

FOOD ASSISTANCE OUTLOOK BRIEF

October 2011

PROJECTED FOOD ASSISTANCE NEEDS FOR APRIL 2012

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 APRIL 2012

AFGHANISTAN: Below-average harvest confirmed by field assessment

Though high wheat prices are likely to be somewhat moderated by the recent Kazakh harvests, below-average local harvests, and low livestock prices and labor wages are likely to result in above-average needs in April, particularly in the rainfed farming areas of the north.

Projected lean season (lowlands): *Sept/Oct - April*

DJIBOUTI: Pastoral areas in crisis, but some improvement expected

Though average October-December rains are forecast, food assistance needs in Djibouti are expected to remain above-average following worse than expected *Karan* rains between July and September.

Projected Central/NW lean season: *January - March*

***ETHIOPIA: Above-average needs likely to persist**

The current emergency in southern pastoral areas, a delayed and below-average *belg* harvest, localized *meher* crop deficits, and the possibility of poor March-May 2012 rains mean that, though needs are expected to decline over the coming 6 months, they will remain above average in April.

Projected lean season (marginal meher): *April/May - Sept*

***KENYA: Improvements expected to follow Oct-Dec season**

October-Dec rains are forecast to be average, though the asset losses which have resulted from the recent drought will drive above-average needs in April. A poor start to the April-June rains, a possibility given the developing La Nina, would further exacerbate expected food insecurity.

Projected lean season (northern pastoral): *Ongoing - Oct*

***MAURITANIA: Season ends poorly, cereal deficits likely**

Harvests of rainfed and flood recession cereals, as well as wild foods, are likely to be significantly below-average following poor performance of main season rains. High international prices and reduced sorghum production are likely to limit food access for poor households.

Projected agropastoral lean season: *March - August*

SOMALIA: Famine expected to persist through at least the January/February Deyr harvest

Famine has been declared in six areas of the south. Continued limitations on humanitarian access, disease outbreaks, and further increases in local cereal prices are expected. Though average October-December rains are forecast, and will support improved crop and livestock production, the magnitude of the current crisis is likely to keep food assistance needs far above typical levels in April 2012, especially if April-June rains start poorly.

SOUTH SUDAN: Insecurity, population movement, and high food prices

Assistance needs are likely to remain above average given displacement, trade restrictions, and localized crop deficits. Needs will be concentrated in border states. Crop production, while poor in some areas, are likely to have improved in others, particularly in long cycle sorghum areas.

Projected lean season (border areas): *Mar/Apr - August*

***SUDAN: Very poor harvest and government imposed limits on assistance**

Below average production, continued conflict and the reduced value of local currency are expected to drive above-average needs during 2012. The most food insecure areas over the coming consumption year are likely to be Blue Nile, South Kordofan, Darfur, Abeyi, and Red Sea state.

Projected lean season: *March - August*

AVERAGE ASSISTANCE NEEDS PROJECTED IN APRIL 2012

BURKINA FASO: Average assistance needs despite localized crop deficits

Though crop production was mixed in the Sahel, the overall harvest is likely to be 15 percent above-average and recent price behavior suggests that traders do not anticipate cereal deficits during the coming consumption year.

Projected pastoral lean season: *March - June*

CHAD: Localized food assistance needs anticipated

Assistance needs will be concentrated in the southern transhumant zone and the eastern rainfed cereals zone. In the southwest (particularly Mayo Kebbi), agricultural production may be below average, and asset losses due to African Pig Plague may reduce local coping capacity.

Projected pastoral lean season: *March - June*

GUATEMALA: Early start to 2012 lean season expected in the east

National needs are likely to be average, though high prices and pest damage are likely to drive higher than usual needs in the eastern dry corridor.

Projected lean season (East): *Mar/Apr - August*

***NIGER: Localized crop deficits, overall production average**

Crop production is likely to be near average, with localized deficits concentrated in Tillaberi region where food security during 2012 is likely to be worse than average, but not exceed Crisis (IPC Phase 3) levels.

Projected agropastoral lean season: *June - August*

NIGERIA: Widespread insecurity in the north

Insecurity, particularly in the north, has driven large-scale displacement and the cancellation of seasonal food security assessments.

Projected lean season (northern agpast.): *June -Sept.*

BELOW-AVERAGE ASSISTANCE NEEDS OR NO ASSISTANCE NEEDS PROJECTED IN APRIL 2012

HAITI, MALAWI (none), MOZAMBIQUE, RWANDA (none), UGANDA, ZAMBIA (none), ZIMBABWE

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.

BURUNDI	-	Despite a good 2011B harvest, food availability in Eastern Burundian markets will likely be limited during the lean season because of the Tanzania export ban.
EL SALVADOR	-	Food security conditions are beginning to improve as the <i>Primera</i> harvest begins and prices fall.
HONDURAS	-	Food security is expected to improve, beginning in September, with the <i>Primera</i> season harvest.
*LIBERIA		Food security remains tenuous, but has improved slightly with the voluntary return of refugees to Cote d’Ivoire and the start of green harvests.
*MALI		Food insecurity will be significantly above average, beginning in January 2012, particularly in the northern agropastoral zone, flood- and irrigation-dependant cropping areas, due to poor rainfall and relatively low river levels.
NICARAGUA	-	Food security is expected to improve following a normal <i>Primera</i> season and forecasts for average <i>Postrera</i> rains in all key growing areas.
SENEGAL	-	Cereal production is expected to be at least average nationally, though millet prices are 12-35 percent above last year due to poor production near Goudiry commune.
SIERRA LEONE	-	Food security has improved following the recent onset of the green harvest and seasonal increases livestock value.
TAJIKISTAN		Though wheat grain prices remain high, remittances have also increased substantially and wheat from Kazakhstan will likely meet demand despite a poor domestic 2011 harvest.
TANZANIA		As the country enters the lean season, food prices across the country have remained high and continue to increase in both deficit and surplus areas despite an export ban.
YEMEN		Political instability, sporadic violence, and rising wheat prices continued in September. There are reports of high levels of malnutrition in northern Yemen. Cholera in southern Yemen is reportedly under control.

-  Important anomalies in proximate causes of food insecurity have been observed and outcomes corresponding to Crisis (IPC Phase 3) or higher on the IPC Acute Food Insecurity Phase Scale are likely to occur now or in the future.
-  Important anomalies in proximate causes of food insecurity have been observed and outcomes corresponding to IPC Phase 2 Stressed on the the IPC Acute Food Insecurity Phase Scale are likely to occur now or in the future.
- No anomalies of concern have been observed.

LEAN SEASONS IN FEWS NET MONITORED COUNTRIES AND REGIONS

