

FOOD ASSISTANCE OUTLOOK BRIEF

August 2010

PROJECTED FOOD ASSISTANCE NEEDS FOR JANUARY 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. Those needs are compared to typical needs at this time of year during the last five years and categorized as Above-average, Average, and Below-average/No need. A star (*) indicates new information this month. For more detail on these projections, please visit www.fews.net.

ABOVE-AVERAGE ASSISTANCE NEEDS PROJECTED IN JANUARY 2011

*AFGHANISTAN: *Harvest good, but regional trade bans will affect imports*

Russia and Pakistan have enacted cereal export bans following drought and flooding. Similar bans in Ukraine and Kazakhstan are also expected. Together, these bans will reduce cereal availability and push prices higher. This, in combination with flooding in localized areas of Afghanistan is likely to push assistance needs higher than normal, despite a good 2010 wheat harvest.

Projected hunger season: November – March

*CHAD: *Typical seasonal improvements in food security expected*

Needs are expected to decline following the onset of full harvests in October and improvements in pasture and water availability in July. But, given households' reliance on asset sales and increased borrowing and because poor households are planting less this season, poor agricultural and agropastoral households in the Sahel will begin to face food deficits requiring assistance beginning in January.

Projected agropastoral hunger season: Ongoing – Sept.

*HAITI: *Needs likely to decline by October, but remain above-normal*

Commercial food imports have fully rebounded, a good harvest is expected, agricultural inputs are available for the coming growing season and many jobs have been created through post-earthquake assistance programs. These factors increase food availability and access, reducing the food insecure population. However given the continued impacts of the earthquake and expected damage from above-average rainfall and potential tropical storms between September and November, needs for external assistance food in January will be higher than the recent five year average.

Projected rural hunger season: April - June

NIGER: *Harvest expected to significantly reduce assistance needs*

Assuming normal main season harvests, external assistance needs are expected to drop significantly by October. However, above-normal needs are expected, as early as December, given that households will likely sell more of their 2010 harvest than normal to repay debt incurred during the current hunger season and because above-normal labor supply may drive lower wages during the October-December harvest season.

Projected hunger season (cropping areas): Ongoing - Sept.

*SOMALIA: *High levels of need likely to continue over the next six months*

Assistance needs will remain above average due to ongoing food insecurity among IDPs, the urban poor, and drought-affected communities in the central, northeast, and northwest regions. Ongoing conflict, the suspension of food assistance, and low livestock productivity are key drivers. The *gu* harvest (July) is expected to have been largely normal, though current forecasts suggest below normal *deyr* rains (Oct-Dec) which could significantly impact pastoral households who remain especially vulnerable following an extended drought between 2007 and 2009.

Projected pastoral hunger season: September - October

AVERAGE ASSISTANCE NEEDS PROJECTED IN JANUARY 2011

*DJIBOUTI: *Improvements expected with kidding in September*

March-May rains performed well and the July-September season has begun normally. Improvements in food security are expected to begin in September when kidding improves milk availability, though average rural assistance needs will exist January and significant urban food insecurity is likely to persist.

Projected Central/NW hunger season: Ongoing - August

GUATEMALA: *Heavy rains likely to persist*

Tropical Storm Agatha has damaged infrastructure and crops, impacts that have been exacerbated by recent heavy rainfall. This may affect harvests (August-January) and cash crop labor demand, especially in the western highlands, where replanting is less feasible. Forecasts for increased hurricane activity and a La Nina, which is associated with wetter than normal conditions, suggest that heavy rains may continue, with negative impacts on agriculture.

Projected hunger season (W. Highlands): Ongoing – Nov

*SUDAN: *Normal needs expected post-harvest*

Overall, food assistance needs in Sudan are expected to decline significantly by October, following August/September harvests. In northern Sudan needs are expected to be below normal, though two million IDPs in Darfur will continue to require assistance. In the south, needs are likely to be normal despite mixed seasonal progress thus far. Insecurity related to the January referendum could negatively affect food security, especially in areas along the border between the north and south.






Projected hunger season: Ongoing - August



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

BURKINA FASO (none), ETHIOPIA, KENYA, MALAWI, MALI (none), MAURITANIA, MOZAMBIQUE, NIGERIA (none), TANZANIA (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. 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 and additional countries will be added over the coming months.

BURUNDI		Increasing civil insecurity due to recent elections have led to the suspension of agricultural activities in some areas, resulting in reduced area sown, limited flow of food to markets, and increased food prices.
EL SALVADOR		A combination of damage from TS Agatha and heavy rains during the coming months may affect labor demand, <i>primera</i> season harvest and <i>postrera</i> season sowing.
HONDURAS		Food availability is good and prices are stable for basic grains but increasing for some vegetables. However, the forecast of an above-average hurricane season and the forecast of a La Nina, which is also associated with heavy rains, may affect both planting and harvests.
NICARAGUA		As with El Salvador and Honduras, prospects for the hurricane season and increased seasonal rainfall are concerns. Surveys in the dry corridor indicate that food security remains stable, though the lean season is approaching.
SENEGAL	-	Imports are strong, and cereal prices are declining to levels below those of last year. Meteorological forecasts are generally favorable for agricultural production and labor demand. Conflict may affect food security in Casamance.
*TAJIKISTAN	-	Fuel prices have increased steadily since February and wheat prospects in major wheat exporting countries (Kazakhstan and Russia) remain lower than normal.
*YEMEN		Fuel and wheat prices have continued to rise. The post-conflict situation in the north remains fragile.

-  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

TYPICAL HUNGER SEASONS IN FEWS NET MONITORED COUNTRIES AND REGIONS

