

FOOD ASSISTANCE OUTLOOK BRIEF

January 2011

PROJECTED FOOD ASSISTANCE NEEDS FOR JULY 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, and 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 JULY 2011

*AFGHANISTAN: *Dryness continues, poor irrigated season likely*

Conditions remain dry as mid-season approaches. Short-term forecasts suggest snow, but the likelihood that adequate snowpack will develop is declining quickly. Poor snow accumulation this winter is likely to result in a below-average irrigated harvest. Even if spring rain-fed harvests are good, needs in July will be above-average. The most substantial needs will occur later in the year and lean seasons beginning 2-3 months early.

Projected lean season (lowlands): **Nov/Dec - March**

*CHAD: *Concerns in the Sahel likely to persist*

A widespread crisis is unlikely, though localized crop damage, an increased reliance on asset sales and borrowing, and a decline in area planted are likely to drive earlier than normal needs among poor agropastoral households in the Sahel. Also, due to uncertainty related to government price and trade policy, traders may not be stocking normally, and the government may have difficulty rebuilding reserves for subsidized sales.

Projected pastoral lean season: **Feb/Mar - July**

*DJIBOUTI: *Coastal rains performing poorly*

Assistance needs in July will be above-average, as the *Heys/Dada* rains continue to be poor in coastal areas, below-average *Sougoum* rains (Mar-May) are currently forecast, and households are more vulnerable than usual due to heavy 2008/09 livestock losses.

Projected coastal lean season: **April - August**

*GUATEMALA: *Heavy rains damage crops, likely to depress labor demand*

Due to crop damage related to tropical storms and heavy 2010 rainfall, the government estimates that approximately 480,000 people will need external food assistance. Needs will begin in February among poor and very poor households in the western highlands and will continue through at least Oct/Nov, when the next harvest begins. Elsewhere, food assistance needs are likely to begin in March and continue through Aug/Sept.

Projected lean season (W. Highlands): **February - Oct/Nov**

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

The lean season, and assistance needs, will peak in April/May. Roughly two million people are expected to need food assistance. By June, needs will likely decline slightly, but remain above average due to the combined impacts of the January 2010 earthquake, Hurricane Tomas, the cholera epidemic, and political unrest. Spring crop production will be heavily affected by cholera epidemic impacts on labor.

Projected rural lean season: **March - June**

KENYA: *Short rains very poor in cropping and pastoral areas*

The 2010 short rains have performed poorly. In northern and northeastern pastoral areas pasture/water availability will be below average, reversing recent recovery from the 2007-09 drought. In marginal southeast and coastal cropping areas crop harvests are likely to be poor, with little or no crop harvested in several areas, including Kitui, Mwingi, Kilifi, and Malindi. High fuel prices are also a concern.

Projected lean season (SE cropping): **March - November**

NIGER: *Early 2011 lean season, especially in pastoral areas*

Severe flooding, in combination with limited pasture and water earlier in the season, led to high levels of animal mortality in pastoral areas during 2010. June is typically the peak of the pastoral lean season and assistance needs will be above normal in 2011. The agropastoral lean season will also be longer than usual, though coping capacity in these areas this year is relatively better due to good harvests.

Projected lean season (pastoral areas): **February - July**

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

Deyr season cereal production is a complete failure in most areas and pasture/water availability is below-average. The ongoing pastoral lean season (Jan-Mar) will be worse than usual and the agropastoral lean season will begin in March, two months early, and be especially severe. A poor Apr-Jun *Gu* season is possible and would result in an even more severe crisis. The onset of such a crisis would be especially rapid in pastoral areas.

Projected agropastoral lean season: **March - June**

AVERAGE ASSISTANCE NEEDS PROJECTED IN JULY 2011

ETHIOPIA: *Needs higher than initially anticipated*

Overall July needs are likely to be average as localized crop damage related to wheat rust, floods, and pests, in combination with drought in pastoral areas, offsets an average to above-average 2010 main season harvest.

Projected lean season (belg): **April - September**

SUDAN: *Average needs expected post-harvest*

Assuming a peaceful referendum, April assistance needs are expected to be below average in the north and near average in the south following a good main season in most cropping and pastoral areas. Population movement from north to south is also expected. If significant post-referendum insecurity occurs, resulting displacement and market disruption would likely drive above-normal external assistance needs.

Projected lean season: **May - August**

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

NIGERIA: Needs expected in the extreme north, though an appeal for external assistance is unlikely. **BURKINA FASO, MALI, MALAWI (none), MAURITANIA (none), MOZAMBIQUE (none), TANZANIA (none), UGANDA, ZAMBIA (none), ZIMBABWE (none)**

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.

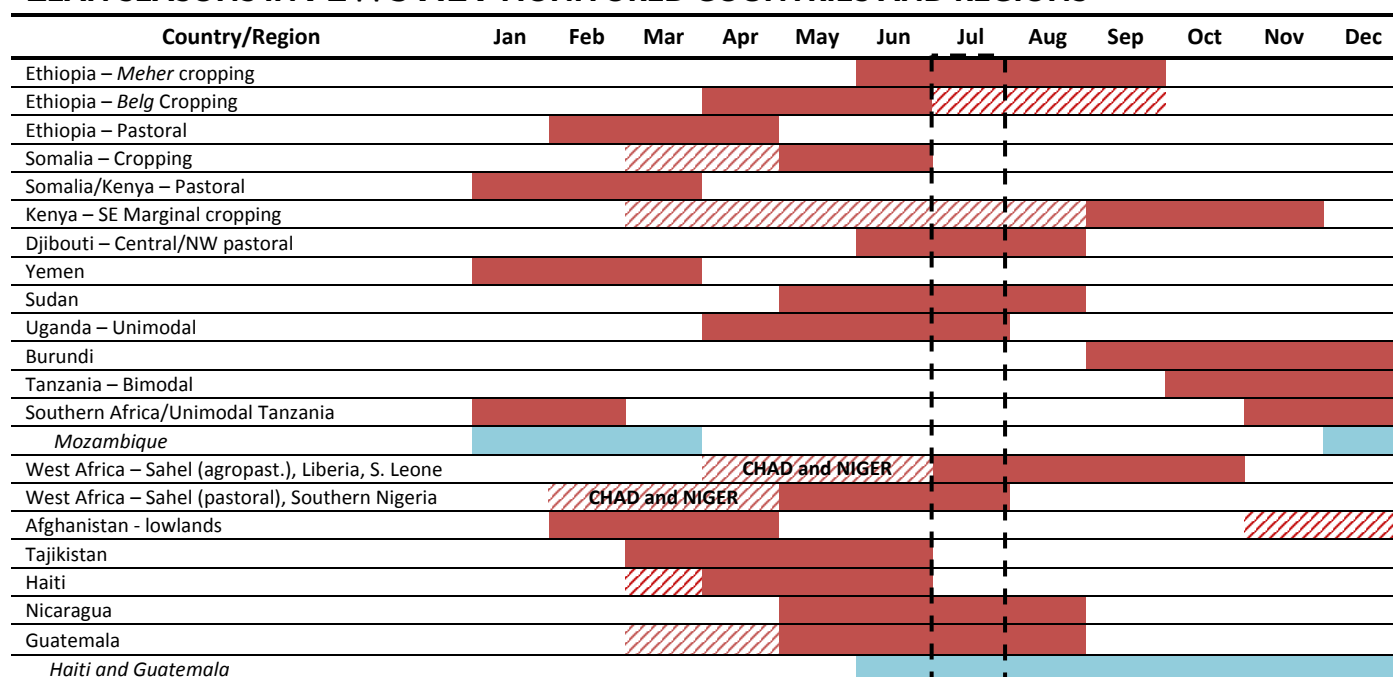
*BURUNDI		The threat of below normal production, due to a delayed start of season, has spread to three livelihood zones: Plateaux humides, Plaine de l’Imbo, and Buragane.
EL SALVADOR	-	Maize and bean prices are generally stable, though some recent increases have been observed. A persistent La Niña may result in an irregular start to the <i>primera</i> season.
HONDURAS		2010 has been the second consecutive year of poor production in areas of the south (LH zones 5, 6, 7, 8, 11). Lean seasons in these areas, which typically start in May, will likely begin 1-2 months early. La Niña threatens the start of the <i>primera</i> season.
NICARAGUA		The lean season in parts of livelihood zones 3, 12, and 13 will likely start in March/April, one to two months earlier than usual, due to <i>primera</i> season crop losses. La Niña threatens the start of the <i>primera</i> season.
*LIBERIA		The continued flow of Ivorian refugees into eastern Liberia is increasing pressure on host household resources during the post-harvest period.
SENEGAL	-	A second consecutive year of good harvests is likely to lead to good food availability and prices near or below the five-year average.
*SIERRA LEONE	-	Main season harvests are complete and food is widely available at the household level. Food security indicators (rice prices, labor cost, exchange rates) follow normal seasonal trend, in most parts of the country.
TAJIKISTAN		Petrol and imported wheat prices remain elevated and continue to affect the food security of poor households.
*YEMEN		The security situation in the northern governorates has improved slightly. Local wheat prices began to rise in December, following international prices, raising food-access concerns.

 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



FAOB Focus month



Typical lean season



Atypical lean season



Hurricane/Cyclone season