



GIEWS Updates

VOLUME 2009

The **GIEWS Updates** are issued by FAO's **Global Information and Early Warning System (GIEWS)** from mid-2004. The updates focus on developing anomalous conditions aimed at providing early warnings, as well as latest and more elaborate information than other GIEWS regular reports on the food security situation of countries, at both national and sub-national levels.

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FAO/GIEWS Global Watch

9 January 2009

Food Security Situation Update: Kenya

Latest reports from Kenya indicate an alarming food situation in Meru North and other parts of eastern Kenya due to significantly below average seasonal rains. Tens of thousands of people are reported to be in need of assistance. Already, large numbers of people, particularly in pastoral areas, are receiving food assistance due to slow recovery from previous drought and continued pastoral conflict and cattle raids. Incidence of Peste des Petits Ruminants (PPR) - a virus that typically affects sheep and goats - in north-eastern Uganda and pastoral areas of Kenya has also caused high rates of small stock mortality, undermining pastoralists' purchasing power, and reducing their food access.

Overall, harvesting of the 2008/09 maize crop is over and the total production has been revised down to 2.6 million tonnes following the crop failure in Eastern province due to a poor and short rainy season. At this level the outturn is about 2 percent and 7 percent lower than in 2007/08 the average of the previous five years, respectively. The price of maize in December 2008 in the Nairobi market, quoted at USD 303 per tonne, has dropped by almost USD 50 from November 2008. However, compared to the monthly average in December 2007, this level is still 36 percent higher. In Mombasa, the price of maize in December 2008 registered at USD 333, a slight decline of about USD 5 compared to November.

In order to increase domestic supply the Government of Kenya has approved imports of about 450 000 tonnes of maize, duty free. In addition, the Government has banned exports of maize grain and flour from the country.

FAO/GIEWS Global Watch

9 January 2009

Sri Lanka - Below average rainfall for the early Maha season

Almost of all Sri Lanka's districts have consistently received well below average rainfall in the early weeks of the Maha season. The latest forecast from the Ministry of Agriculture remains optimistic, but the situation warrants close and continued watching.

FAO/GIEWS Global Watch

16 January 2009

Severe Drought Prevails in Northern China, Major Winter Wheat Producing Region

Since the start of the 2008/09 winter wheat season, Northern China has received precipitation levels 70-90% below normal. Drastically lower precipitation affected winter wheat crop in southern Hebei province, western Shandong province, mid-Henan province, and southeastern Shanxi province.

<http://ncc.cma.gov.cn/upload/upload2/hljc/eki090116.gif>

FAO/GIEWS Global Watch

16 January 2009

Central Asia

Generally good winter crop conditions except for localized areas in Afghanistan, Iran, Tajikistan and Uzbekistan.

See European Commission JRC report at <ftp://mars.jrc.it/bulletin/Russia&CAC/CA/> or through <http://mars.jrc.it/>

FAO/GIEWS Global Watch

28 January 2009

Update on the current Kenya Food Security Situation

This brief has been prepared by the FAO Regional Emergency Office for Africa in cooperation with the FAO Office in Kenya

Kenya is currently facing a serious food security situation due to a combination of factors: Displacement, insecurity, poor rainfall, rising food and other commodity prices, reduced cereal production and livestock diseases; these have combined to increase food insecurity among many vulnerable populations, including pastoralists in arid and semi-arid land (ASAL) of northern Kenya, vulnerable population in Eastern Kenya and coastal lowland areas, as well as amongst the urban poor.

Following the post election violence that hit the Rift Valley in January-February 2008, displaced farmers have seen their access to land dramatically reduced; high input prices (in particular fertiliser and fuel) have forced low income farmers to reduce the surface under cultivation and the use of inputs; erratic rainfall has reduced maize yields in eastern and northern Kenya. All the above has contributed to a marked decline of maize production during the 2008/09 farming season. Current estimates, taking in full consideration the results of the "short rain" planting season, are now pointing towards an overall output of 2.16 million tons instead of the 2.6 million tons initially anticipated. Considering current levels of consumption and draw down from stocks (largely in the hands of private traders), an overall deficit of some 190,000 Mt is expected and current stocks should last until May, well before the onset of the new harvest in the middle of July 2009.

At the same time, the Strategic Grain Reserve (SGR) cannot play its institutional role injecting grains in the market as stock was drawn down during the summer in anticipation of a good long rains harvest. However, the season was mediocre and the remaining SGR stock was released on to the market in October-November in a bid to moderate the sharply rising prices. Due to the limited quantities injected and mismanagement of the operation, no positive effects were observed.

The shortfall of maize combined with very high prices prevailing in the international markets in the first half of the year have pushed the internal price of maize to a very high level, thereby reducing access to food by the most vulnerable section of the population. At the end of 2008, the retail price of maize flour (staple food) was Ksh. 60/Kg or some 50% higher than in the same period last year. Wholesale maize prices equally went up some 50% from Ksh. 1,350 to Ksh. 2,100-2200.

At the end of November, the Government of Kenya took the following measures in order to reduce the market price:

- Reducing Maize flour price from Ksh.60/Kg to Ksh.36/Kg for middle income citizens and Ksh. 26 for the most vulnerable.
- The National Cereals and Produce Board has been ordered to release at least 27,000 Mt of maize grains to the millers for processing with immediate effect.
- The Government has increased the Cereal Board of Kenya's (CBK) buying price to Ksh.1,950 per bag from Ksh.1,750 in order to encourage farmers to sell their maize. Under this arrangement the National Corn Producer Board (NCPB) would buy maize directly from the farmers at Ksh. 1,950 per bag (USD 277/MT) and re-sell the same to the millers at Ksh. 1750/bag (USD 250/MT).
- With the anticipation of a good harvest, importation has been put on hold until after the short rains harvest was finalized.

These measures have not had any significant impact on the retail price of maize flour, which continues to remain very high. Only reduced quantities of maize were commercially imported from Tanzania and Uganda (on average 15,000 Mt/month). It is to be noted that Tanzania has still a ban on maize export and prices in Uganda and Tanzania are very close to the ones recorded in Kenya.

The situation is further complicated by reported poor handling of the Strategic Grain Reserve, of market interventions and decisions on imports. Several sources are also suggesting that big producers and traders are holding on to their stocks in order to create an artificial dearth of maize on the market and keep prices at a high level.

At the beginning of January 2009, the President of Kenya declared the food shortage a national disaster. As a short term measure, the Government has approved the importation of 900,000 MT (10 million 90kg bags) duty free maize grains into the country in order to boost supply. This will be done by both the Government and the private sector. The Government will import seven million bags (630,000 Mt) for its strategic grain reserves,

while the millers and traders will import three million bags (270,000 Mt). In addition and in order to keep the local domestic production within the country, exports of maize grain and flour have been banned. It is not expected that new imports of Maize will reach the country before February/March 2009.

For the time being, the Government has indicated that 10 million persons are highly food insecure. This number includes a provisional estimate: (i) of 3.2 million drought affected marginal farmers, agro pastoralists, and pastoralists in the arid and semi arid districts of northern and eastern Kenya; (ii) about 150,000 IDPs; (iii) 850,000 school children that will be incorporated into an emergency school feeding programme; (iv) 3.5 million urban slum dwellers, and (v) about 2.2 million persons affected by HIV/AIDS, including HIV orphans. These numbers need to be verified, therefore, it is still early to make a final judgement and a much better picture will be provided by an interagency assessment planned to start at the end of January 2009.

Kenya's difficult situation was anticipated by the Emergency Humanitarian Response Plan (EHRP) issued in November 2008. Among other needs, EHRP appealed for US\$ 173 million of food aid for 1.3 million people and US\$ 17 million for livelihood support interventions. Nevertheless, these figures were based on the initial more optimistic estimate of a national production of some 2.7 million MT. The appeal is currently under revision and the forthcoming assessment will provide essential information in terms of updated figures on population in need of assistance.

4 February 2009

44 percent of winter wheat areas in China under extreme drought conditions

Severe drought prevails in Northern and Western China, major winter wheat producing areas. Since the start of the 2008/09 winter wheat season, Northern and Western China have received precipitation levels 70-90 percent below normal. Drastically lower precipitation severely affected 9.5 million hectares of winter wheat (some 44 percent of total area planted) in the following provinces: Henan, Anhui, Shandong, Hebei, Shanxi, Shaanxi, and Gansu. Potentially affected output amounts to about 10 percent of China's total annual cereal production.



<http://ncc.cma.gov.cn> map: <http://ncc.cma.gov.cn/upload/upload2/hljc/eki090204.gif>

FAO/GIEWS Global Watch

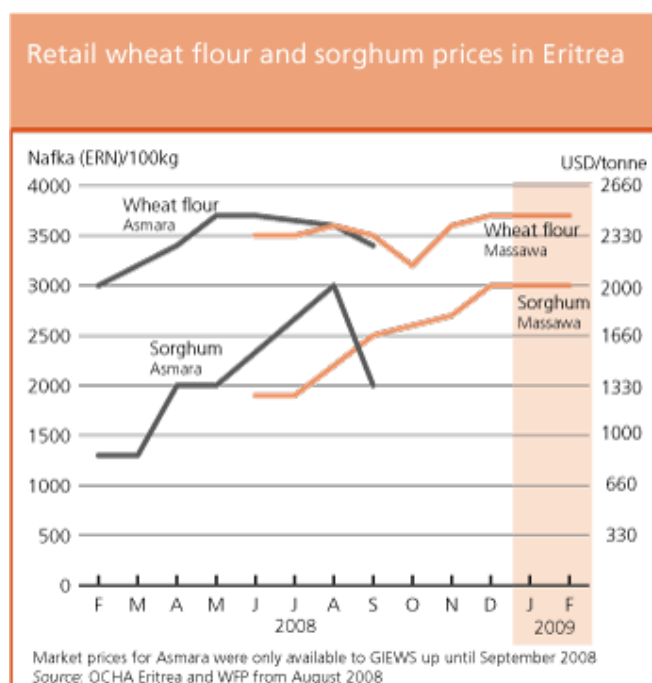
30 April 2009

Eritrea Update - Sustained High Cereal Prices Cause for Serious Concern

In Eritrea, the price of wheat flour and sorghum increased notably since February 2008 but has shown some stabilisation during January and February 2009, following the main harvest in November/December. Between September 2008 and February 2009 the price of wheat flour, which is mostly imported, increased by 6 percent in the main port town of Massawa. Similarly, during the same period, the price of sorghum increased by 20 percent. This substantial price rise will negatively and significantly impact on the food security of the population, particularly in rural areas where sorghum is the main staple. Furthermore, US dollar based prices in Eritrea, using official exchange rate, indicate considerably higher price levels as compared to regional neighbours.

In 2008, below average rainfall during the main "kremti" growing season resulted in reduced cereal production. Satellite based estimates made by the Joint Research Centre of the EC last year indicate the level of production at about 200 000 tonnes, about half of the previous year. The vegetation index from September 2008 verifies the poor vegetation growth, except for the western Gash Barka region, which exhibited moderate growth. Overall, however, total domestic cereal production covers less than half the national cereal requirement.

In 2009, the "bahri" rainy season, which normally lasts from October to February and is important for pasture regeneration and the coastal secondary season crop production, was delayed and only began during late December 2008. The below average vegetation index for February 2009 confirms the poor performance of the bahri rains.



FAO/GIEWS Global Watch

6 May 2009

**Food Security Update for Sri Lanka:
Over One Million People Affected in Five Northern Districts, Drought in a Southern Area**

The intensified conflict between the national government and the Liberation Tigers of Tamil Eelam (LTTE) has affected over one million people living in five northern districts (Jaffna, Kilinochchi, Mannar, Mullaitivu and Vavuniya). Over 100 000 people have fled the conflict zone since 20 April 2009, joining those already in temporary camps which now shelter some 192 000. About 50 000 people are also estimated to be trapped between firing lines, and some 40 000 civilians, expected to flee the conflict zone in the next two weeks, will require emergency food aid interventions.

At the national level, food supply is satisfactory; paddy production for the 2009 Maha season is officially forecast at 2.5 million tonnes, 18 percent increase compared to last year's good production. However, the standing crops in the two conflict districts: Kilinochchi and Mullaitivu have been severely affected by the conflict, while crops in the southern district of Badulla have been stricken by drought. Based on the latest official forecasts, the paddy output during this Maha season is likely to decrease compared to last year: by 30 percent in Killinochchi (21 500 tonnes compared to 31 000 tonnes, with a population of 142 000), by more than 45 percent in Mullaitivu (10 380 tonnes compared to 19 200 tonnes, with a population of 145 000), and by about 80 percent in Badulla (18 900 tonnes down from 88 000 tonnes, with a population of 837 000). Food insecurity in these districts is, therefore, anticipated in 2009/10.

All international humanitarian agencies operating in the LTTE-controlled Kilinochchi and Mullaitivu districts have been ordered to relocate to Vavuniya as of September 2008. They still have no access to the conflict areas.

FAO/GIEWS Global Watch

16 June 2009

Argentina:

Unfavourable prospects for 2009 cereal production

Dry weather determines very low production of 2009 coarse grains

Harvesting of 2009 maize and sorghum crops is about to be completed and production is early forecast at 12.7 and 2 million tonnes, respectively, between 40 and 30 percent below the good levels of the last two years. Scarce and erratic precipitations and hot temperatures until the end of January coupled with relatively high prices of inputs have delayed planting operations and often prevented farmers to accomplish with their planting intentions. In the case of early planted varieties, February and March rainfall were somehow too late to determine a beneficial effect on yields, because most of the damage caused by the lack of soil moisture during crucial flowering and pollinating phases was already irreversible. Most affected provinces are La Pampa, Entre Ríos, Santa Fe and part of Buenos Aires.

Extended areas with coarse grains not profitable to be harvested

Some 35 per cent of total planted area with maize and sorghum, accounting to almost 1.5 million hectares, is reported to be in poor conditions and it is not profitable to harvest it for grain, so farmers have often decided to use it for pasture. This difficult situation is expected to reduce Argentina's exportable surplus of maize in marketing year 2009/2010 (March/February) to only 7.5 million tonnes, about 60 per cent of the average volume traded in the last five years.

Alarming situation for 2009 winter wheat

Dry weather conditions and cold temperatures are hampering planting of 2009 winter wheat crop. At the beginning of June only 400 000 hectares have been planted compared to 800 000 hectares in 2008 and 1.3 millions in 2007. Scattered precipitations have recently benefited some producing areas such as central and south eastern Buenos Aires, but more precipitations are needed to fully recharge subsoil moisture levels. In Northern provinces, the lack of timely rainfall prevented farmers to plant long cycle wheat varieties and the higher risk associated to short cycle varieties may induce them to switch to other crops such as barley or rapeseed. The effects of unfavourable weather conditions are coupled to the low profitability of the crop that has been limited by high prices of inputs, low domestic prices and a high export tax. Estimates of planted area with 2009 winter wheat have been gradually downward revised in the last few weeks due to unfavourable weather conditions: now they stand at only 3.7 million hectares, the lowest level in the last 100 years, but may go further down if rainfall does not resume immediately.

FAO/GIEWS Global Watch

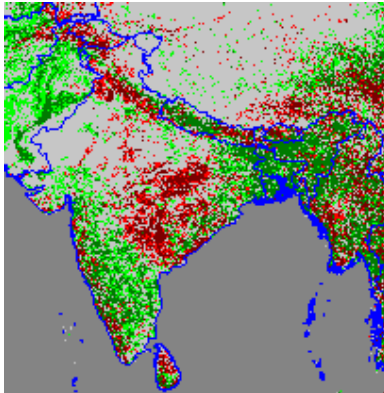
13 July 2009

India Update - Late start of the monsoon season – Northwest most affected

In **India** the southwest summer monsoon rains normally start early June in the south and work their way to the north by mid-July to begin the main *kharif* cropping season. However, according to the India Meteorological Department, the cumulative rainfall from 1 June to 9 July this year was 34 percent below a verage for the country as a whole. Total precipitation, however, had improved from the 43 percent deficit the week before. The most below-normal rainfall has been experienced in the north-western areas of western Uttar Pradesh, Uttarakhand, Haryana, Chandigarh , Delhi , Punjab , Himachal Pradesh and Gujarat .

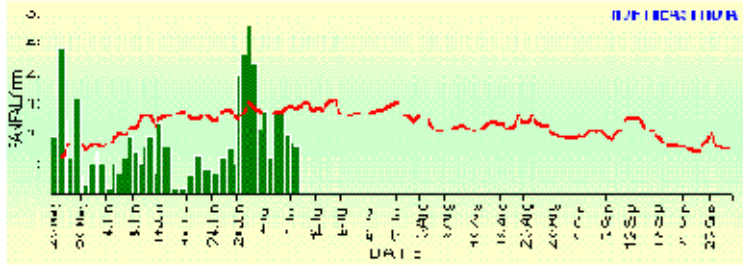
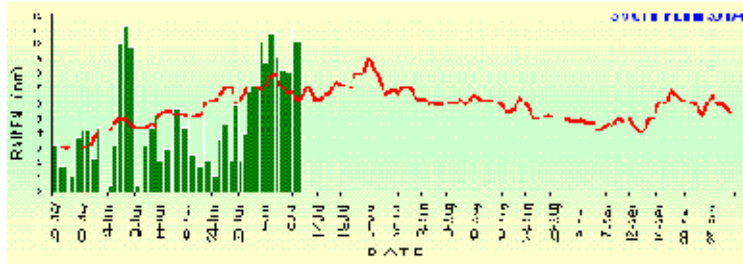
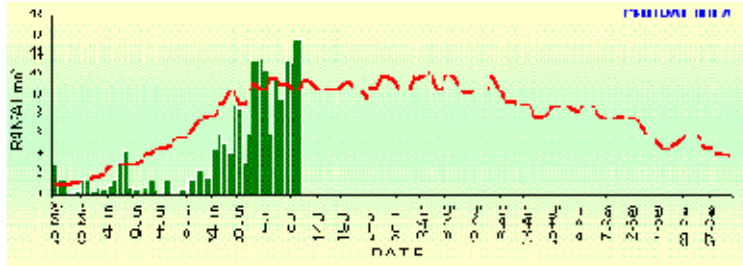
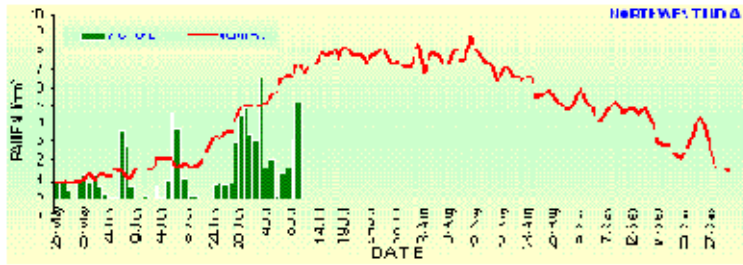
The impact of late and below normal cumulative rains on vegetation growth is seen in the NDVI (Normalized Difference Vegetation Index) satellite image below (Figure 1). Although the exact impact of late plantings is not yet known, t he early outlook for *kharif* crops including rice and coarse grains is unfavourable in some of the major producing regions. Based on the past five year average, cereal production from the *Kharif* season amounts to about 53 percent of total annual production, or an average of 107.5 million tonnes per year.

Figure 1: NDVI June 2009, dekad 3



Source: FAO–ARTEMIS, SPOT Image.
<http://www.fao.org/gIEWS/english/spot4/mas/index.htm>

Figure 2: Daily rainfall



Source: India Meteorological Department.

FAO/GIEWS Global Watch

28 July 2009

India and Bangladesh:

A late start of the monsoon and erratic rains affect northern States of India and northern region of Bangladesh

A drought-like situation is developing in parts of India and Bangladesh. The rain deficit is affecting water supplies and farmers in the affected areas of both countries are reportedly facing electricity and fuel shortages or higher costs for pumping water for irrigation.

In **India** the southwest summer monsoon rains normally start early June in the south and work their way to the north by mid-July to begin the main *kharif* cropping season. However, according to the India Meteorological Department (IMD), the cumulative rainfall from 1 June to 16 July this year was 24 percent below average for the country as a whole. Total precipitation, however, had improved from the 34 percent deficit the week before. According to IMD, the rainfall situation slightly improved over northwest India compared to the week before but decreased drastically over northeast India. The most below-normal rainfall has been experienced in the north-west and the north-east including the important food producing States of Punjab, Haryana, and Uttar Pradesh. Rainfall deficit problems were also reported in Bihar (Times of India).

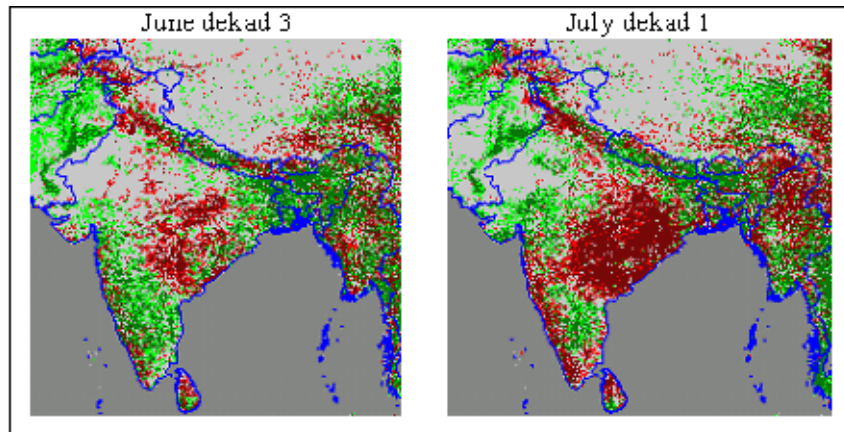
The National Crop Forecasting Centre has indicated that as of 17 July 2009, area sown nationally under all *Kharif* crops was 48.032 million hectares, which is 9 percent below the last year's area sown by this time. Water stock in selected 81 major reservoirs in the country during the second week of July was 55 percent of the 10-year average level. Better rainfall during the second week of July has improved the stock from 48 percent the week before (Central Water Commission).

Ironically, severe localized flooding has affected certain districts of Assam, Bihar, Gujarat, Kerala, Maharashtra, and West Bengal.

The impact of late and below normal cumulative rains on vegetation growth is shown in the NDVI (Normalized Difference Vegetation Index) satellite images below (Figure 1). Although the exact impact of the late plantings is not yet known, the early outlook for *kharif* crops including rice and coarse grains is unfavourable in some major producing regions. Based on the past five-year average, cereal production from the *Kharif* season amounts to about 53 percent of total annual production, or an average of 107.5 million tonnes per year.

In **Bangladesh**, according to the Bangladesh Meteorological Department, the country received 37 percent below normal rainfall between June 1 and July 20. The situation is reportedly worse in the northern and central region, seriously affecting rice-paddy plantings during this Aman season. The drought-like situation has been eased after light to heavy rainfall was recorded over the country in the last several days. According to news reports (bdnews24.com and Financial Express) the government has announced financial assistance to farmers, in particular free electricity for irrigation, to protect rice production in the 16 affected districts.

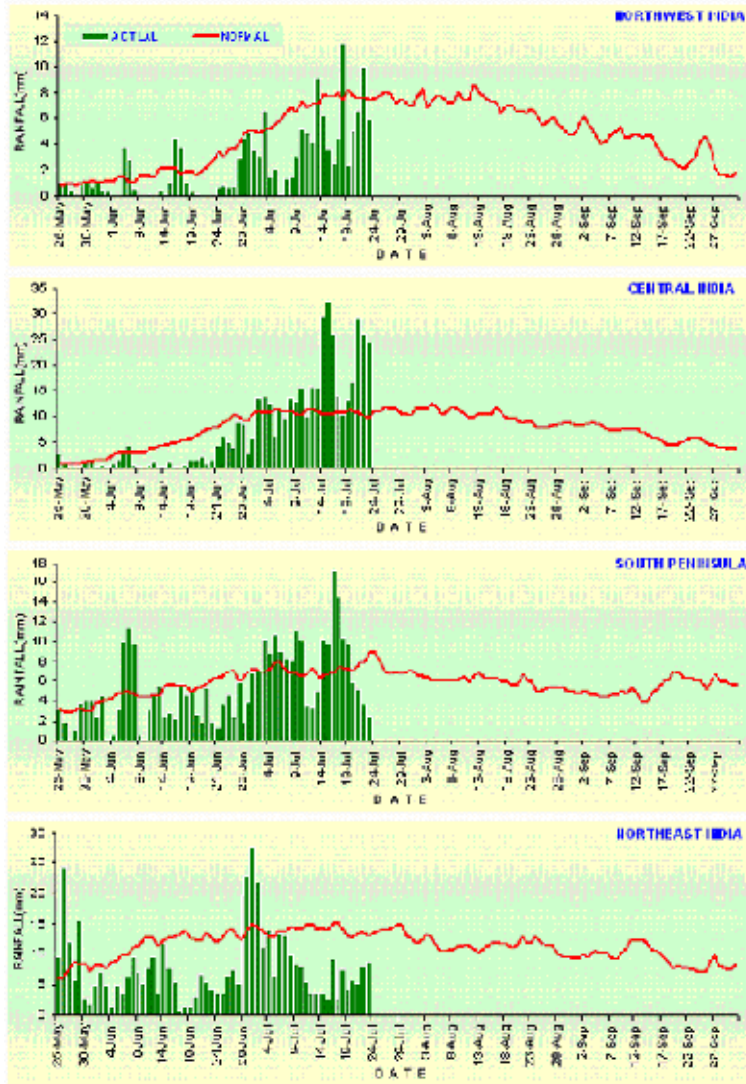
Figure 1: NDVI satellite images



<Legend: Dark red=Large Decrease to dark green =Large Increase>

Source: FAO-ARTEMIS, SPOT Image.
<http://www.fao.org/giews/english/spot4/mas/index.htm>

Figure 2: Daily rainfall



Click on the image to view a larger version.
 Source: India Meteorological Department.
http://www.imdpune.gov.in/mons_monitor/homo.gif

FAO/GIEWS Global Watch

04 August 2009

Moldova -

Drought in Southern Moldova Threatens 2009 Food Production

The area sown to crops for harvest in 2009 exceeded 1.1 million hectares, including 433 000 hectares of winter crops (mainly wheat and barley). Until late April, winter crops developed satisfactorily. However, drier and hot conditions as of May adversely affected the yield potential of grain-filling winter crops, and severely stressed spring maize in southern areas. As a result, the average yield of winter wheat has fallen below the five-year average (2004-2008). Preliminary official reports indicate that the aggregate output of wheat is only 650 000 tonnes (cleaned weight), only half of last year's bumper harvest of 1.3 million tonnes and an average of 875 000 tonnes. The reduced quantity is offset by better quality and higher gluten levels of the wheat.

The dry conditions have severely affected the main spring crop, maize, notably in the districts of Kahul, Chadry-Lunga, Bassarabjaska, Leova, Stefan Voda, Taraska and Streshen. Early reports indicate that the Government expects maize yields to be between 1.6-1.8 tonnes per hectare; that is almost 40 percent below the five-year average of 2.9 tonnes per hectare, and only about half of last year's bumper yield. The effect of drier weather on other crops, potatoes, vegetables and fruit is expected to be more muted as their production is spread throughout the country and often takes place on household plots. The yield of sunflower is reported to be about average.

Following last year's bumper harvest, the implications for aggregate food security are not disastrous but household and farm income (already amongst the lowest in Europe) will be further reduced in the affected areas. Production of wheat is sufficient to meet domestic needs, and substantial stocks are available to be drawn down. The maize supply situation is tighter, but a stock drawdown will ensure that, compared to the really poor harvest of 2007, twice the amount of maize will be available for feed. Indications are that, providing the harvest forecasts eventuate, and with a stock drawdown of over 300 000 tonnes, both food and feed use of cereals will remain close to trend at the aggregate level. However, in the affected districts, individual farmers could experience shortages.

FAO/GIEWS Global Watch

10 August 2009

Moldova Update- Drought in Southern Districts

This is an update of the August 04 posting.

The area sown to crops for harvest in 2009 exceeded 1.1 million hectares, including 433 000 hectares of winter crops (mainly wheat and barley). Until late April, winter crops developed satisfactorily. However, drier and hot conditions as of May adversely affected the yield potential of grain-filling winter crops, and severely stressed spring maize in southern areas. As a result, the average yield of winter wheat has fallen below the five-year average (2004-2008). The table below, from the European Commission's Joint Research Center shows expected yields for barley, maize and wheat.

MOLDOVA							
CROPS	Yield t/ha					% variation	
	2007*	MARS 2009 forecasts			Avg 5yrs**	Avg09 vs 07	Avg09 vs 5yrs**
		Avg	min	max			
barley	0.9	1.0	0.7	1.5	1.69	+10.7	-58.6
grain maize	0.8	1.9	1.6	2.2	2.89	+144.2	-34.3
wheat	1.3	1.6	1.2	1.9	2.13	+23.7	-24.9

* FAOSTAT 2007
** FAOSTAT (2002-2006)

Preliminary official reports indicate that the aggregate output of wheat is only 650 000 tonnes (cleaned weight), only half of last year's bumper harvest of 1.3 million tonnes and an average of 875 000 tonnes. The reduced quantity is offset by better quality and higher gluten levels of the wheat.

The dry conditions have severely affected the main spring crop, maize, notably in the districts of Kahul, Chadry-Lunga, Bassarabjaska, Leova, Stefan Voda, Taraska and Streshen. Early reports indicate that the Government expects maize yields to be between 1.6-1.8 tonnes per hectare; that is almost 40 percent below the five-year average of 2.9 tonnes per hectare, and only about half of last year's bumper yield. The effect of drier weather on other crops, potatoes, vegetables and fruit is expected to be more muted as their production is spread throughout the country and often takes place on household plots. The yield of sunflower is reported to be about average.

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FAO/GIEWS Global Watch

20 August 2009

**Guatemala: Drier than Normal Conditions Lower
Harvest Expectations for Maize and Beans**

Since July 2009, overall, cumulative rainfall levels significantly below average have been reported in eastern and southern departments of Guatemala, including El Progreso, Baja Verapaz, Jutiapa, Jalapa, Chiquimula and Zacapa.

These departments are known as the dry corridor of Guatemala and are annually affected by the recurring phenomenon of *canícula or veranillo*, which is an extremely dry spell that occurs during the rainy season.

This year the dry conditions have been prolonged with particularly severe effects on agricultural production. In these departments, which account for approximately 15 percent of domestic maize production, the main maize crop is about to be harvested and preliminary estimates indicate a lower output due to the loss of thousands of hectares of cultivated land. Significant losses of beans, one of the main components of poor households' diet, have also been reported.

The Ministerio de Agricultura, Ganadería y Alimentación (MAGA) has recently spent more than \$7.2 millions to purchase seeds and inputs for the forthcoming maize secondary season and for emergency food rations for immediate distribution, between August 24th and September 11th, to the affected communities, approximately 54,564 families. A Contingency Plan is expected to be activated in the following days. This includes the delivery of family rations for 30 days in municipalities with very high risk of food insecurity.

For additional information on food security situation in Guatemala, please visit: The SESAN website on <http://www.sesan.gob.gt/> and refer to their *Monitoreo en Seguridad Alimentaria y Nutricional*. The FEWS website on <http://www.fews.net/> and refer to the section on Guatemala updates.

FAO/GIEWS Global Watch

08 September 2009

India: About half of Indian districts face drought: 278 districts in 11 states have been declared as drought-hit

In India, a late start of the monsoon, followed by erratic and scanty rains is expected to result in crop losses in about 45 percent of the districts. The rain deficit is also affecting water supplies and farmers in the affected areas are reportedly facing electricity and fuel shortages or higher costs for pumping water for irrigation.

The southwest summer monsoon rains normally start in early June in the south and work their way to the north by mid-July to begin the main *Kharif* cropping season. However, according to the India Meteorological Department (IMD), the cumulative rainfall from 1 June to 26 August this year was 25 percent below the long term average for the country as a whole. The cumulative rainfall deficit was highest in the North - 40 percent in the North-West and 25 percent in the North-East, while, the Central parts of the country faced 20 percent deficit. The South Peninsula was affected the least, experiencing some 14 percent rain deficit.

The National Crop Forecasting Centre has indicated that as of 28 August 2009, the area sown nationally under all *Kharif* crops was 86.756 million hectares, which is 8 percent below the last year's area sown by this time. Major reductions in paddy plantings are observed in the central states of Uttar Pradesh, Bihar and Jharkhand, southern state of Andhra Pradesh and the eastern state of West Bengal. Area planted in some of the northern states was likely helped due to available irrigation facilities there.

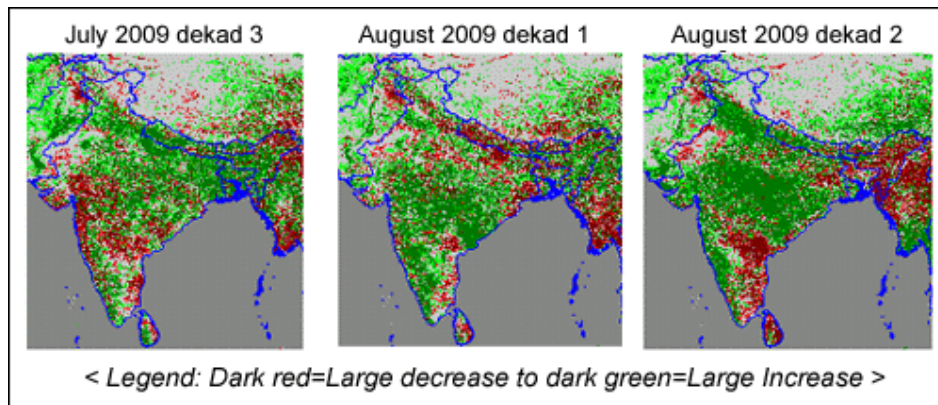
Water stock in selected 81 major reservoirs in the country during the first week of July was below 50 percent of the 10-year average level. Better rainfall in July in parts of the country had improved the stock to almost 100 percent of the average. The current level, however, is measured at 67 percent (Central Water Commission). Ironically, severe localized flooding has affected certain districts of Assam, Bihar, Gujarat, Kerala, Maharashtra, and West Bengal states this season.

The impact of late and below normal precipitation on vegetation growth is shown in the NDVI (Normalized Difference Vegetation Index) satellite images below (Figure 1). Although the exact impact of the late plantings is not yet known, a statement in late-August by the Minister of Agriculture indicated a reduction in rice production by 10 million tonnes (equivalent to about 12 percent of last year's *kharif* rice production). According to the country's Finance Minister, the drought is likely to reduce farm production for the Kharif season by 15 to 20 percent. Based on the past five-year average, cereal production from the Kharif season amounts to about 53 percent of total annual production and about 85 percent of the main staple rice production. India produced 117.7 million tonnes of foodgrains during the last *Kharif* season. The crops that are most affected include - sugarcane and rice-paddy in irrigated areas and coarse grains and pulses in dry land areas. This could slowdown the country's gross domestic product (GDP) growth, which some sources forecast at 6.5 percent during the second half of this fiscal year, down from a 9 percent last year.

Government recently announced an increase in support price of paddy from INR 850 to INR 950 per quintal and similar increases for some other food crops have been promised.

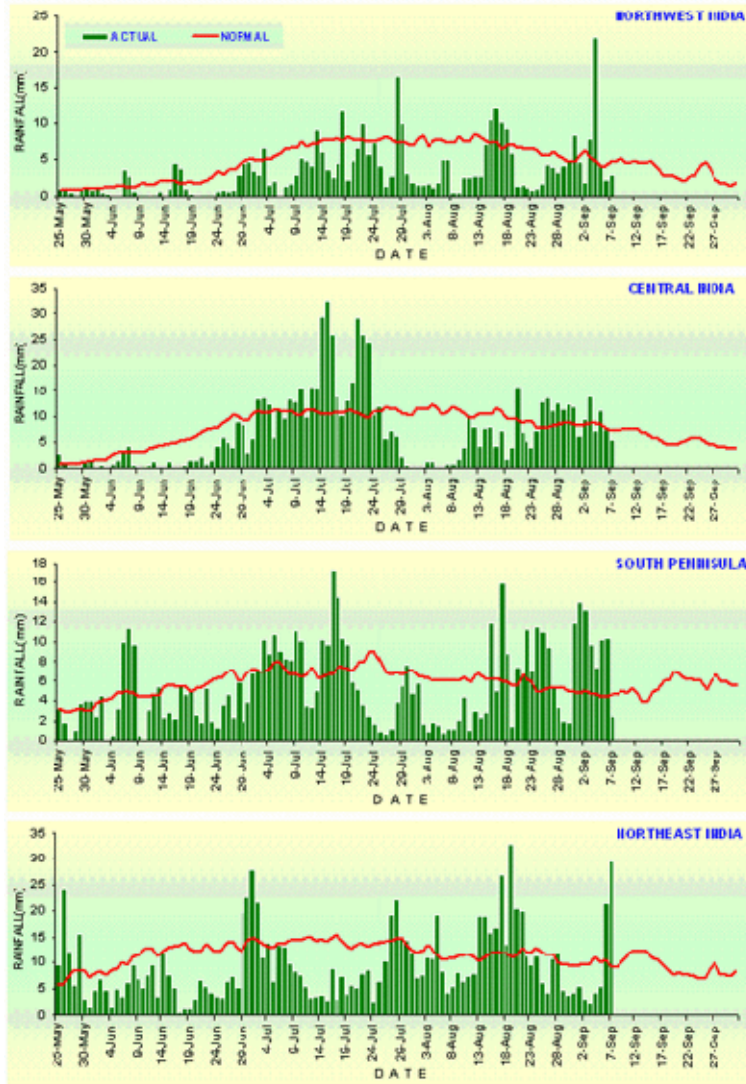
In spite of the expected reduction in foodgrain production of this season, the overall food security in India is considered to be satisfactory given the high level of food stocks on hand (estimated at some 33 million tonnes of rice and 25 million tonnes of wheat), continuation of the export ban, and the provision of highly subsidised rice or wheat distribution programme especially for the below-poverty line families under the National Food Security Act. The fast developing situation, however, needs to be watched carefully.

Figure 1: NDVI satellite images



Source: FAO-ARTEMIS, SPOT Image.
<http://www.fao.org/gIEWS/english/spot4/mas/index.htm>

Figure 2: Daily rainfall



Click on the image to view a larger version.
 Source: India Meteorological Department.
<http://www.imd.gov.in/section/nhac/dynamic/monsoonct.htm>

FAO/GIEWS Global Watch

24 September 2009

Argentina: prolonged drought has affected grain production and will reduce export surplus

During July, localized heavy rains in central and southern Buenos Aires left most of the other provinces almost completely dry. Additionally, below average temperatures, which pertained until mid-August in southern farming areas, were recorded throughout the country. Negative crop development anomalies have appeared in the NDVI (*Normalized Difference Vegetation Index*) since the very beginning of the winter cropping season (May 2009).

During the last weeks of August, the green light was given for the planting of the 2010 maize crop campaign in the Santa Fe province, and sowing is expected to start in September in the rest of the country. Maize producers are facing a water shortage, lack of financial liquidity, as an effect of low yields obtained in the last campaign, and low cereal market prices; planted area with maize is thus expected to decrease to 1.8 million hectares. Consequently, for rented fields it is likely that farmers will opt to plant more profitable cash crops such as soybeans instead of rotating crops.

On the other hand, soiling of 2009 wheat cropping season is completed. The area sowed with wheat increased marginally compared to last forecast exceeding 2.8 million hectares. In spite of this, the total acreage still remains well below the 4.2 million hectares planted in 2008. With the exception of Entre Rios province, the Buenos Aires region, which alone accounts for more than 40 percent of the country's wheat production and some other localized areas, planted area was severely reduced. A decline in cultivated land above 70 percent was reported in northern and central Cordoba and northern and central Santa Fe.

Given the low expected wheat output for the current season, production surplus is likely to be severely reduced. In the 2009/2010 marketing year between 1.5 and 2 millions tonnes of wheat will be available for export compared to 3.8 millions tonnes in 2008 and more than 10 millions tonnes in 2007.

Although it might be late for boosting wheat production, the maize area could still be increased by the Government's lifting of export taxes on wheat and maize for small and medium-scale growers.

Sources: Secretaría de Agricultura, Ganadería, Pesca y Alimentos <http://www.sagpya.gov.ar/SAGPyA/index.php>
Bolsa de Cereales
<http://www.bolcereales.com.ar/>

23 November 2009

Unfavourable food security prospects in the eastern part of West Africa, notably in Chad and Niger

In 2009, agricultural production has been affected in Chad, Niger and Nigeria by late onset of rains, prolonged dry spells and significant pest infestations. In Nigeria, this was compounded by continuing lack of access to fertiliser. An expected increase in crop production in Benin will not be enough to offset lower supplies in neighbouring countries. Rising food insecurity, especially in Niger and Chad is, therefore, likely in 2010, as discussed below.

Production prospects

In *Nigeria*, most States in the far northern part of the country witnessed an unfavourable pattern of rainfall. This included a late onset of the rainy season, prolonged dry spells, and unusually late rains in late October/early November, potentially affecting crop maturity and drying. Torrential rains and flooding of farmlands, particularly in the South, also resulted in localized crop losses in July and August. Although regular and well distributed rains benefited crop development in the North Central areas (including most of Gombe, Plateau, Kaduna, Niger and Nassarawa States), distribution of subsidised fertilizer by federal and state governments covers less than 30 percent of requirements. As a result, the joint field evaluation survey conducted by the National Agricultural Extension and Research Liaison Services (NAERLS), the National Food Reserve Agency (NFRA) and the Federal Department of Agriculture in 2009 estimated 16.4 percent and 6.5 percent declines in millet and sorghum production, respectively, compared to 2008. By contrast, maize production is forecast to increase by 9.9 percent, while rice output is expected to expand by 9 percent. An average output is forecast for crops that are concentrated in the Middle Belt and Southern Zones of the country, and less dependent on fertilizer, such as cassava, cocoyams and yams.

In *Chad*, growing conditions for cereal crops and pastures have been poor in most parts of the country, due to a late start of the rainy season, which delayed plantings, and subsequent erratic precipitation. A joint CILSS/FAO//FEWSNET mission has estimated cereal production in 2009/10 at 1.16 million tonnes. At this level, production is about 34 percent lower than both last year's good output and the five years average. Production of sorghum and millet, the most important food crops, is estimated to have declined by 22 percent and 34 percent, respectively, to 460 900 tonnes and 310 500 tonnes. Pastures were seriously affected with reports of livestock deaths in the important pastoral areas of Kanem, Batha Ouest and Nord Biltine.

In *Niger*, the most vulnerable country, erratic rains and extended dry spells throughout the growing season caused serious damage to crops and pastures in several areas. The most seriously affected departments included Bouza, Madaoua, Illéla, and Tahoua in the Tahoua region; N'Guigmi and Diffa in the Diffa region; Doutchi in the Dosso region; Tessaoua and Mayahi in the Maradi region and Magaria, Mirriah, Gouré and Tanout in the Zinder region. Aggregate cereal production in 2009 is estimated at some 3.65 million tonnes, which is 26 percent lower than the bumper crop of 2008 and 3 percent below the average for the previous five years. Furthermore, following severe pest infestations and poor rainfall, production of cowpea, the main source of income for farmers, was estimated to drop by 34 percent to some 840 000 tonnes.

Market and food security prospects

Cereal prices have remained well above the pre-food price crisis levels two years ago, in most countries of the subregion, in spite of last year's record crop. Although coarse grain prices declined somewhat from their peak of August-September 2008, most recent millet prices in markets of N'Djamena (Chad) and Niamey (Niger) ¹ were still 72 and 42 percent higher respectively than in the corresponding period of 2007. In Dawanau International Grains Market in Kano (Nigeria), the biggest in the subregion, the price of millet and sorghum in early November was 40 percent higher than its level of November 2007.

The expected reduction in **Nigeria's** cereal production could lead to a new rise in cereal prices across the subregion with a serious negative impact on rural food-deficit households and urban consumers. This is particularly so in **Niger**, where the combination of reduced cash crop returns, poor rangeland conditions, a fall in production (especially for millet) in Northern Nigeria, and the continuing combination of poverty and persistently high food prices, could lead to sharp increases in malnutrition. Although livestock prices have remained relatively stable, several parts of the country may experience acute food insecurity if the upward trend in food price continues. Large segments of the population will be at risk of food shortages in 2010 and will require targeted and timely assistance. In view of the current food supply situation and unfavourable prospects of imports from Nigeria, the situation is both serious and likely to deteriorate further in Niger and in **Chad**. Therefore, the following urgent actions are recommended:

- Safety net interventions, such as targeted distribution, sales at subsidized prices, food for work or cash

for work activities, will be required during next year lean season, with quantities depending on the extent of food supply and pasture deficits in specific areas;

- distribution of inputs such as seeds and fertilizer is also needed to enable farmers to produce enough food during the current off-season (December-February) and the next cropping season (from June 2010);
- Vulnerable people, especially children, need to continue to have access to therapeutic and feeding centres;
- In each country, market and price conditions and the situation of vulnerable groups, need to be closely monitored in order to respond to any sharp increase in assistance requirements..

1. in September 2009 for N'Djamena and November 2009 for Niamey

FAO/GIEWS Global Watch

11 December 2009

**Madagascar: Concern over possible cyclone damage prompts UN
to appeal for pre-positioning emergency stockpiles**

On 25 November the UN Country Team in Madagascar has appealed for \$6 million in donations to stockpile emergency supplies, including tarpaulins, medicines and water purification tablets against the imminent cyclone season that annually devastates the island ..

The cyclone season usually starts in December and runs trough April and coincides with the main growing season for rice, the main staple food crop in the country. In the last two years five cyclones struck Madagascar affecting over 463,000 people and caused widespread flooding and the destruction of thousand of hectares of farmland..

This year the cyclone season appears to have started early with two cyclones Anja in mid November and Bongani in early December bringing heavy rains in the northern tip of Madagascar. Fortunately they caused no substantial damages. A third cyclone Cleo is currently forming in the Indian Ocean and it is unclear at this stage if it will hit Madagascar and coastal Africa in its path. The situation is being closely monitored.

This report is prepared by the **Global Information and Early Warning System (GIEWS)** of the Trade and Markets Division of FAO. The updates focus on developing anomalous conditions aimed at providing early warnings, as well as latest and more elaborate information than other GIEWS regular reports on the food security situation of countries, at both national and sub-national levels. None of the information in this report should be regarded as statements of governmental views.

For more information visit the **GIEWS Website** at: www.fao.org/giews

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