Price Surveillance Bulletin

January-April 2015

ACF INTERNATIONAL Expertise and Advocacy Department/ Food Security and Livelihoods

General Statement on International Price Variations

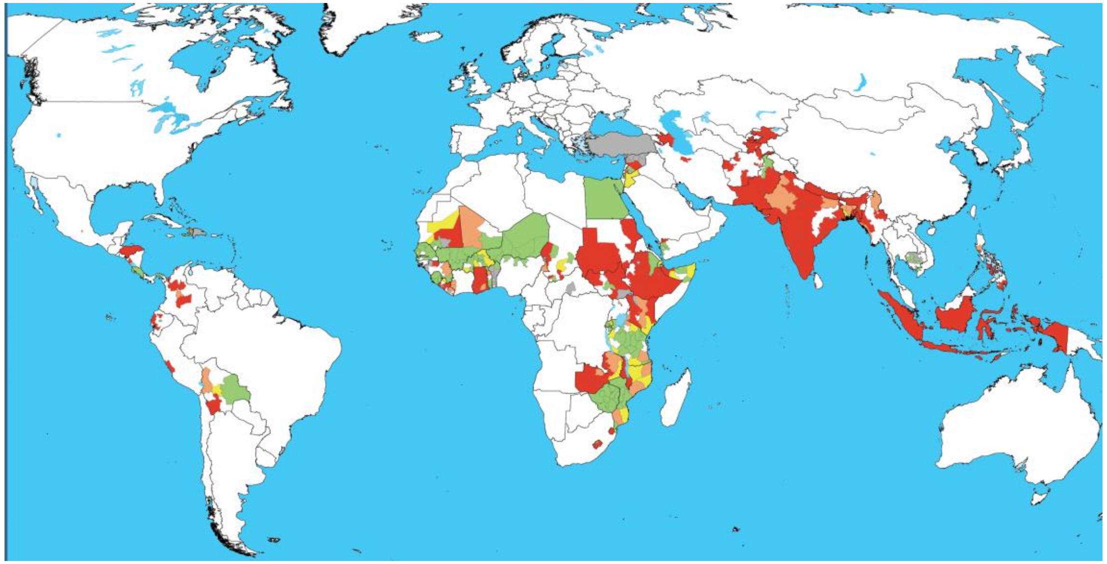
Evolution of Food Prices at a Global Scale and Main Determinants:

Early prospects for cereal supplies in 2015/16 are mostly favorable, partly sustained by large stocks accumulated over the previous two seasons[1]. International cereal prices remain lower than they were at this time last year – the price of rice has dropped by 7.7 %, wheat by 17 %, and maize by 16.6 %.

- **Wheat**: FAO's first forecast for global wheat production in 2015 indicates a likely small contraction (- 1%), mostly reflecting an unexpected decline in Europe from last year's record output. Export quotations of wheat declined significantly in February as ample world supplies continued to weigh on international prices. A strong US dollar has also had negative impacts on sales from the United States of America, thus contributing to the decline in export prices[1].
- **Maize**: Export prices of maize in February were generally weaker. Large global supplies and favorable 2015 production prospects in South America, where harvesting has begun, put downward pressure on prices[1].
- **Rice:** International rice prices remained under pressure in February, with the FAO All Rice Price Index down 1% from the previous month, marking the sixth consecutive month of decline. Overall, prices in the first four months of 2015 were 6.3% lower than in the corresponding period in 2014.

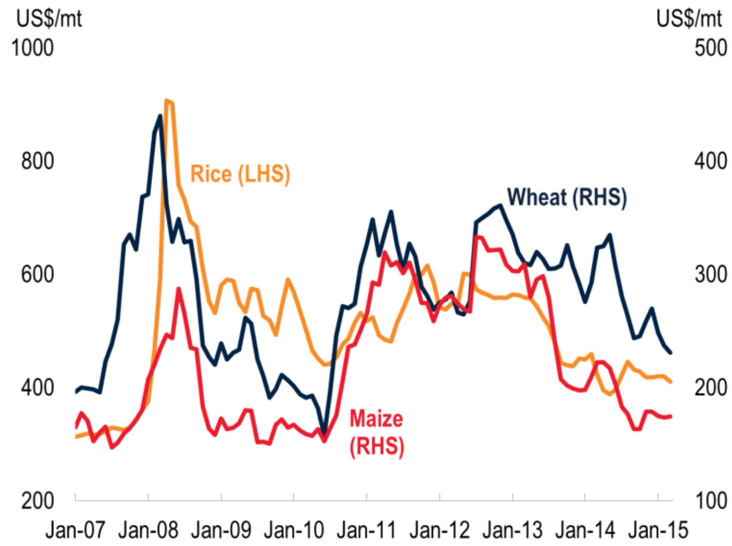
Countries Requiring Vigilance:

- **Nepal:** In the wake of the devastating April 25th earthquake, a decrease in availability and access to food and other resources will very likely affect food prices. This bulletin will be updated as more information becomes available.
- **Central African Republic (CAR):** Staple food prices are expected to increase due to rampant civil insecurity and conflict, which also pose grave concerns for the population, territory, and economy. Widespread disruption of agricultural and marketing activities, as well as large-scale displacements, continues to affect food prices.
- **Yemen:** Staple food availability remains limited or completely restricted in many markets, thus significantly affecting national food prices. The population's food security situation has continued to deteriorate and will likely lead to a humanitarian catastrophe if swift action is not taken.
- **South Sudan:** Market disruptions in conflict-affected states have increased cereal prices by up to 300%. Poor road conditions and fuel shortages have further constrained already low levels of trade.



Impact of Staple Commodity Price Changes on the Cost of the Basic Food Basket **Source: WFP; base map: UNCS**
Q1-2015 (January to March) vs Q1-Baseline (Avg. January to March over the past five years)

Impact Codes	Low (< 0%)	Moderate (0-5%)	High (5-10%)	Severe (> 10%)	Monitored but without baseline	Water bodies



Source: World Bank Data last updated April 2015

Price Surveillance by Country: Classification Based on Food Price Trends

Country	Main Staple Food Price Trends	Other Elements Impacting Food Security	Severity and Potential Actions
Central African Republic (CAR) ***not classified due to lack of information**	The most current information available on market price trends dates back to August 2014. Due to widespread civil insecurity and conflict, prices are expected to be higher than the seasonal or yearly average[1].	Food crop production in 2014 remained 58 % below the pre-crisis five-year average, due to the ongoing socio-political crisis, widespread insecurity, erratic rainfall in western parts of the country, and pest attacks. A new surge in violence reported since the beginning of the year is triggering new internal and cross-border population movements resulting in approximately 50,000 additional people being displaced since the beginning of the year[2]. Findings from rapid assessments conducted by Action Against Hunger (ACF) in IDP camps in certain villages in Ouham prefecture show a high percentage of households with "poor" food consumption scores and/or consuming just one meal a day[3].	As of March 2015, about 1.5 million people are in need of urgent assistance (IPC Phase 3 "Crisis" and IPC Phase 4 "Emergency) with 1.3 million of them located in rural areas and 200,000 in Bangui[4]. The repeated violence in January and February 2015 was followed by de-escalation in attacks in March, though widespread fear slows return movements and further hampers the planned humanitarian response designed to assist displaced populations[5]. In December 2014 the international community launched a Strategic Response Plan, which aims to assist 2 million beneficiaries.
Iraq	Wheat flour prices in Anbar, Kirkuk, and Salah Al-Din are more than twice the price in Baghdad, presumably because of reduced distributions of public distribution system (PDS) wheat flour in these areas[6]. Food prices are generally stable, but disruptions of markets, cross-border trade, and restricted movement of food commodities are a concern[7].	While vegetation conditions are healthy in the north and south, they are stressed in the conflict-affected governorates of Anbar, Salah Al-Din and Diyala, suggesting that the conflict is impacting irrigation, agricultural inputs, and fieldwork[8]. The conflict has made food prices high and volatile in Anbar, Kirkuk, and in parts of Salah Al-Din; in these areas the food basket costs 25 to 30% more than in the capital Baghdad[9].	Conflict in Iraq has disrupted food markets, leading to price hikes in Anbar, Salah Al-Din and Kirkuk; around 5.2 million people are in need of humanitarian assistance, and over 2.5 million people are currently displaced.

[1] GIEWS CAR Country Brief, Reference Date 8 April 2015
[2] UNHCR
[3] FEWS NET
[4] GIEWS CAR Country Brief, Reference Date 8 April 2015
[5] FEWS NET
[6] WFP Global Food Security Update Issue 17 March 2015
[7] GIEWS Iraq Country Brief, Reference Date 10 February 2015
[8] WFP Global Food Security Update Issue 17 March 2015
[9] WFP Global Food Security Update Issue 17 March 2015

South Sudan	During the first quarter of 2015, seasonally adjusted prices rose 33% for millet and 11% for sorghum compared to the fourth quarter of 2014[10]. Market disruptions in conflict-affected states have increased cereal prices by up to 300%[11]. In Unity State, sorghum prices were three to four times higher than in non-conflict affected areas[12]. In Greater Upper Nile, food prices are very high, up to ten times higher than pre-crisis levels in some areas, such as Bentiu and Rubkona[13].	Key contributing factors to the country's food insecurity are conflict-related displacement, disruptions in livestock and crop-based production, high staple food prices, and high malnutrition. Staple food stocks are projected to deplete within this first quarter of 2015. There have been ongoing unprecedented levels of inter-clan conflict and cattle raiding, which significantly affect livelihood stability[14].	In South Sudan, 2.5 million people are facing Crisis (IPC Phase 3) or Emergency (IPC Phase 4) levels of food insecurity. Phase 4 Emergency conditions now prevail in parts of Jonglei and Unity. Food insecurity in this area could worsen if humanitarian assistance is disrupted or is not scaled up, and/or if agreements to cease hostilities are not upheld during the tense dry season, when conflicts usually escalate[15].
Syrian Arab Republic	In January 2015, the Syrian government issued a decree that increased the official price of subsidized items including bread, gas and diesel; as a result, prices increased by more than 10% compared to December 2014[16]. On average, 1 kilo of rice is available at 226.8 SYP (1.20 USD), which represents a 25.8% increase since August 2014. Similarly, between August 2014 and February 2015, the average retail price of bread rose by 33%[17]. Coupled with localized food shortages and the weakening currency, these price increases are likely to increase inflation and further destabilize the food security situation of millions of people[18].	Due to an official increase in food prices in January 2015, the purchasing power and food security situation of poor households, who mainly depend on local markets, has further deteriorated[19]. Assuming continuing favorable climatic conditions, cereal production is expected to recover compared to the drought-stricken harvest of 2014. However, given the severity of the conflict and a lack of essential inputs, recovery will be slight[20].	Half of Syria's population is now assessed as food insecure[21]. 9.8 million people require food, agriculture and livelihoods-related assistance; of these, around 6.8 million people live in high priority districts and need critical food assistance[22]. Although some international food assistance is being provided, host communities in neighboring countries find themselves stressed by the arrival of Syrian refugees in need[23].

[10] FAO, Crop Prospects and Food Situation No.1 March 2015
[11] IPC
[12] FAO, Crop Prospects and Food Situation No.1 March 2015
[13] GIEWS South Sudan Country Brief, Reference Date 23 Janauary 2015
[14] IPC
[15] IPC
[16] WFP Syria Market Price Watch 2015
[17] WFP Syria Market Price Watch 2015
[18] GIEWS, Syrian Arab Republic Country Brief, Reference Date 7 April 2015
[19] WFP Syria Market Price Watch 2015
[20] GIEWS, Syrian Arab Republic Country Brief, Reference Date 7 April 2015
[21] WFP
[22] WFP Global Food Security Update Issue 17 March 2015
[23] FAO, Crop Prospects and Food Situation No.1 March 2015

Yemen	Retail prices of wheat flour have been increasing sharply since the recent crisis began in Yemen. Compared to the pre-crisis month (February 2015), prices of wheat flour during the 4th week of April have risen by 50% in less affected areas and by 90% in the hardest hit locations. Current prices have increased by an estimated 30% from the 2011 crisis months, when they were already unseasonably high[24]. Scarcity and skyrocketing prices of fuel continues.	Such high price escalations in recent months have led to a larger food insecure population. Food expenditure by poor households takes over half of their total spending share. Of the total food expenses, staple foods (mainly wheat) constitute about 60%. Currently, wheat flour is not available in almost all markets of the most crisis-affected governorates that include Aden, Ad Daleh, Sa'ada, Taiz, and Sana'a, due to the disruption of the supply chain and market functioning, as well as the restriction of movements due to a lack of fuel, ongoing war, and insecurity[25].	Approximately 40 % of the population is considered food insecure[26]. The continued blockade of the country has halted commercial importation and humanitarian aid supply. Consequently, the population's food security situation has continued to deteriorate and will likely lead to a humanitarian catastrophe if swift action is not taken[27].
Cameroon	Cross-border attacks by Boko Haram are disrupting trade in the region and increase insecurity; as a result, seasonal quarterly prices rose in Northern Cameroon in the first quarter of 2015 for the main staples (+26% for sorghum, +13% local rice, and +10% for maize)[28]. Disruptions due to ongoing violence are expected to continue to affect food prices throughout the year.	In addition to recurrent droughts and floods, an influx of refugees in the east from the Central African Republic (CAR) and Nigeria exacerbates food insecurity in Cameroon[29]. In the Sahelian region (North and Far North) of the country, malnutrition, epidemics, and food insecurity are a threat to thousands of Cameroonians and refugees. According to satellite imagery, seasonal rains started in March in southern parts of the country, allowing the sowing of the first maize crop of 2015[30].	Overall, the humanitarian situation in the Eastern areas where refugees from CAR and Nigeria are seeking refugees is dire, with host communities and refugees competing over the already depleted natural resources. Humanitarian agencies, in close cooperation with the government, are providing assistance (albeit limited) to refugees and host communities[31]. In the Far North, the situation is much worse in terms of food security and aid is not as mobilized as it is in the Eastern part of the country.
Chad	Most notably, prices of maize in Bol shot up sharply between January and March, and continue to rise. Prices for maize are nearly double the five-year average and well above last year's levels. Prices for millet in Moussoro are lower than they were at this time last year and reflect the five-year average. Nominal retail prices for sorghum in N'Djamena remain in line with the five-year average. Prices for maize in Moussoro remained stable with minimal fluctuation in the beginning of the year and started to increase slightly in March, while rice prices in N'Djamena remain stable. Imported and local rice prices also remain stable[32].	Insecurity in Chad's neighboring countries puts additional pressure on the domestic market[33]. In areas hosting IDPs and refugees, resident family resources are strained. For example, In Lac and western Kanem, assistance from resident households to refugees has led many resident families to pre-maturely exhaust their food stocks – more than half of these households currently rely on markets to meet their food needs; normally, at this time of the year, only a third of local households rely on markets for food consumption[34]. It is important to note that the most vulnerable households always rely on markets at this time of the year.	A large influx of refugees, mainly due to the Boko Haram conflict, puts additional pressure on local food supplies. Over 653,000 people are estimated to be in IPC Phase 3 and in need of food assistance according to the latest Cadre Harmonisé analysis[35]. In the absence of humanitarian assistance, Crisis and Emergency outcomes, including increased levels of acute malnutrition, are expected over the next six months for the worst affected households in Chad and the bordering Lake Chad region.

[24] WFP VAM Yemen Weekly Market Monitoring Updates 27 April 2015
[25] WFP VAM Yemen Weekly Market Monitoring Updates 27 April 2015
[26] FAO, Crop Prospects and Food Situation No.1 March 2015
[27] WFP VAM Yemen Weekly Market Monitoring Updates 27 April 2015
[28] WFP, The Market Monitor, Issue 27 April 2015
[29] FAO, Crop Prospects and Food Situation No.1 March 2015
[30] GIEWS, Cameroon Country Brief, Reference Date 19 March 2015
[31] GIEWS, Cameroon Country Brief, Reference Date 19 March 2015
[32] FEWS NET Chad Price Bulletin April 2015
[33] GIEWS Chad Country Brief, Reference date 06 February 2015

Liberia	The price of imported rice has increased over the last several months, mainly due to exchange rate depreciation[36]. (Food prices in the capital and in ACF intervention zones (Bong, Lofa, Margibi, Montserrado) are expected to remain stable[37]. In other areas, food prices for April to July 2015 are predicted to rise seasonally to reach above average levels, due to low food stock levels at the market and household levels, strong demand for seed, and high transportation costs[38].Between August and September 2015, prices for imported rice are expected to remain stable across most markets, although certain price increases will likely be observed in isolated rural areas due to transportation difficulties during the rainy season[39].	The Ebola Virus Disease (EVD) continues to disrupt markets, farming activities and livelihoods, which seriously affects the food security of large numbers of people. EVD accounts for the food insecurity of 170,000 people[40]. Liberia relies heavily on imported food with a cereal import dependency ratio of over 60%. Border closures, quarantine measures and other restrictions have seriously disrupted marketing of goods, including agricultural commodities[41]. Increased unemployment rates compared to last year's levels likely contribute to reduced household food access through market purchase for affected households[42].	The number of food insecure people is expected to reach 750,000 by March 2015[43]. People are more vulnerable in the western zone of Liberia, which includes Gbaroplu, Grand Cape Mount and Bomi counties.
Libya	Food prices have sharply risen since the escalation of the conflict, and the trend is anticipated to continue. Prices of basic food items such as cooking oil, tomatoes, rice and wheat flour have gone up by more than 40% on average compared to the pre-crisis period. IDP/returnee households spend more than half of their expenditure on food, which is considered to be high compared to the pre-crisis period[44].	Libya relies heavily on imports (up to 90%) for its cereal consumption requirements. The actual import requirement is projected at 3.2 million tonnes in 2014/15, an increase of about 7% compared to 2013/14[45]. Basic services such as water, gas and electricity have been disrupted frequently. In Adjabiya, cooking gas has been out of stock for more than one month[46].	Escalating civil conflict halted economic recovery and deteriorated food security prospects. Security uncertainties led to destruction of public infrastructure and disrupted procurement and distribution systems resulting in lost income opportunities for farmers unable to market their production and food shortages in urban areas. As of October 2014, over 287,000 people were internally displaced. The WFP aims to assist up to 175,000 beneficiaries[47] with food rations and hygiene kits[48].

[34] FEWS NET
[35] FAO
[36] GIEWS Liberia Country Brief, Reference Date 22 January 2015
[37] ACF
[38] FEWS NET West Africa Special Report, April 2015
[39] FEWS NET West Africa Special Report, April 2015
[40] FAO, Crop Prospects and Food Situation No.1 March 2015
[41] GIEWS Liberia Country Brief, Reference Date 22 January 2015
[42] FEWS NET West Africa Special Report, April 2015
[43] GIEWS Liberia Country Brief, Reference Date 22 January 2015
[44] WFP Libya Inter-agency Rapid Assessment, December 2014
[45] GIEWS, Libya Country Brief, Reference Date 26 January 2015
[46] WFP Libya Inter-agency Rapid Assessment, December 2014
[47] GIEWS, Libya Country Brief, Reference Date 26 January 2015
[48] UNHCR

Madagascar	As of December 2014, prices for both local and imported varieties of rice were approximately 9% (local) and 4% (imported) below their year-earlier values, reflecting both the improved 2014 rice output and adequate volumes of imported rice[49]. The continuous wet weather in most of the country has disrupted the production of wood charcoal, the main cooking fuel for the majority of the population (even in urban areas), leading to a sharp increase in its price. From 20 February to March 2015, prices for a bag of wood charcoal and a loaf of bread each rose by 33%; a kilo of flour, a kilo of rice, and a kilo of vegetables rose by 40%, 8%, and 150%, respectively[50].	2015 crop production prospects are mixed, due to heavy rains, damage by Cyclone Chedza, and an extended dry spell in the south[51], where ACF is active in the country. Most of the country has had excessive rainfall since January 2015, except for the southern region, which is suffering from severe drought. As such, food insecurity remains severe in southern regions, due to limited cereal availability, while dry weather has lowered production expectations for the 2015 crop[52]. Many people in the southern regions must now resort to eating cactus and wild plants[53].	As of March 16, OCHA reports that an estimated 200,000 people in the Great South are in need of immediate food assistance[54] due to crop failure. Assessments following the heavy rains and cyclone estimate that 39,000 people were displaced. The government, in coordination with UN agencies, is providing emergency assistance to the cyclone-affected populations, while food assistance is being provided to vulnerable households in southern regions affected by the prolonged dry period[55].
Mongolia	Wheat flour prices in Ulaanbaatar were generally stable for the seventh consecutive month in January, but were 29% above last year's level. Prices are underpinned by a continued strong domestic demand and a strong depreciation of the local currency[56]. Prices of beef and mutton meat in Ulaanbaatar strengthened in January due to high demand; however, both remained below their levels from the previous year.	The official estimates for 2014 wheat production have been revised upward, to a record level of 488,000 tons, 33% up from last year's weather-depressed harvest. Cereal imports (mainly from the Russian Federation and Kazakhstan) in the 2014/15 marketing year are forecast to decrease by 12% from last year's above-average level, to 105,000 tons[57].	In Mongolia, the growing season lasts for 90 days and unpredictable weather conditions affect crop production and, in turn, dietary diversity and nutrition[58]. A successful three-year government-funded program on knowledge sharing and capacity building in the agricultural sector recently concluded and will soon be followed by a second follow-up phase[59].

[49] GIEWS, Madagascar Country Brief, Reference Date 20 March 2015
[50] WFP Global Food Security Update Issue 17 March 2015
[51] GIEWS, Madagascar Country Brief, Reference Date 20 March 2015
[52] FAO, Crop Prospects and Food Situation No. 1 March 2015
[53] WFP
[54] WFP Global Food Security Update Issue 17 March 2015
[55] GIEWS, Madagascar Country Brief, Reference Date 20 March 2015
[56] GIEWS, Mongolia Country Brief, Reference Date 27 February 2015
[57] GIEWS, Mongolia Country Brief, Reference Date 27 February 2015
[58] WFP
[59] WFP

Nepal	Although seasonally adjusted prices rose slightly in Nepal for wheat (+6%) and rice (+2%) from last quarter, reflecting lower rice production and the higher cereal import requirements for the 2014/15 year[60], prices will be mostly driven by the devastating April 25th earthquake.	As of 28 April 2015, the 7.8 magnitude earthquake that struck Nepal in April 2015 has left more than 5,000 people dead. The damage to the agricultural sector has not yet been evaluated, but many households are likely to have lost their food stocks and agricultural inputs. The food security of these individuals is also negatively impacted by market disruptions due to destroyed roads, which hamper access to food[61]. Nepal's vulnerability to high food prices, especially in remote mountain areas, drives hunger. Average food prices (before the earthquake) in the mountain and hill regions are over 100 percent higher than in other locations[62].	An estimated 8 million people have been affected by the earthquake[63]. The Nepalese government has declared a state of emergency in the affected areas and has officially requested international assistance[64]. Over the next three months, WFP aims to provide food for 1.4 million people in urgent need of assistance after the quake[65]. ACF is also playing an active role to provide access to clean water, food, and hygiene kits for those who have lost everything.
Afghanistan	Increased prices for wheat and low-quality rice staples represent a 1% increase in the cost of the food basket from the previous quarter[66] and a severe 20.6% increase in the cost of the food basket from the 5 year baseline[67]. Compared to 2013, bread and cereals in 2014 recorded an increase of 4.5%, while the largest increase was recorded by fresh and dried fruits (over 15%)[68].	Cereal production prospects for the winter crops in Afghanistan are uncertain, as a result of below-average cumulative precipitation up until mid-February[69]. Lower production yields could result in higher prices. Cereal import requirements (mainly wheat) in the current 2014/15 marketing year (July/June) are forecast at 2 million tons, about 5% above last year and the five-year average. Ongoing conflict between the government and insurgent forces continues to result in displacement and threatens food security.[70]	The overall food security situation has generally been stable, due to the above-average harvest over the last three years (2012-2014). Nevertheless, 2.1 million people are classified as very severely food insecure, of which 1.7 million are targeted with food assistance. Over 700,000 people are internally displaced, mostly in Helman province[71].

[60] WFP, The Market Monitor, Issue 27 April 2015
[61] GIEWS, Nepal Country Brief , Reference Date 27 April 2015
[62] WFP
[63] WFP
[64] GIEWS, Nepal Country Brief , Reference Date 27 April 2015
[65] WFP
[66] WFP, The Market Monitor, Issue 27 April 2015
[67] WFP mVAM Bulletin Afghanistan April 2015
[68] GIEWS Afghanistan Country Brief, Reference Date November 2014
[69] FAO, Crop Prospects and Food Situation No.1 March 2015
[70] GIEWS Afghanistan Country Brief, Reference Date 10 November 2014
[71] FAO, Crop Prospects and Food Situation No.1 March 2015

Bangladesh	Overall, staple food prices are stable in Bangladesh[72]. Domestic rice prices decreased in the first three weeks of March, reflecting adequate supplies from the previous 2014 bumper “aman” harvest, an anticipated record “boro” crop and considerably higher rice imports by the private sector. Rice prices were slightly below last year’s level. Prices of mostly imported wheat flour decreased slightly during the first three weeks of March and were below their year-earlier levels. Continuing government wheat distribution also put downward pressure on wheat prices[73].	Despite growth in wages over the past five years, food price spikes prevent millions of people, particularly the urban poor and rural landless, from having a balanced diet[74]. In the northern districts of the country, including Rangpur and Sylhet, ongoing civil protests have disrupted the supply of fertilizers and fuel, which may result in localized crop losses[75]. Most of the northern districts and sub-districts have a surplus in rice production, but they have deficits in fish, eggs, meat, and milk – diversification of food production represents a big challenge[76].	The northern districts of Bangladesh suffer from an alarming level of acute malnutrition. Due to flooding in 2014, the current situation of acute malnutrition may further deteriorate, as water and sanitation systems were seriously damaged. As of December 2014, 48% of the population is classified in Humanitarian phase (Phase 3 and Phase 4) of which 35% are in Crisis Phase 3 and 13% in Emergency Phase 4[77].
Burkina Faso	Reflecting three consecutive years of good production, markets remain generally well-supplied and coarse grain prices have remained mostly stable over the last two years. Similarly, price of imported rice, mainly consumed in urban centers, have remained almost at the same level since 2010. Overall, food prices are likely to continue to follow normal patterns[78].	In spite of a generally favorable food supply situation, the food security situation remains difficult, mainly in the Sahel and North regions, due to localized rainfall deficits in 2014[79]. A massive influx of refugees from Mali places additional pressure on local food supplies – over 32,000 Malian refugees are estimated to be living primarily in the Oudalan and Soum provinces as of January 2015[80]. These provinces have already been facing food insecurity and high malnutrition rates.	Faced with the early exhaustion of food stocks, a spike in staple food prices, and a decline in income, which comes mainly from live-stock rearing, poor households in the communes of Tin-Akoff, Nassoumbou, and Koutougou in the extreme north of the country are experiencing Stressed (IPC Phase 2) acute food insecurity[81].
Cote d’Ivoire	Measures to limit the spread of the Ebola Virus Disease (EVD) have disrupted local markets and have caused the price of imported foodstuffs to skyrocket. In terms of imported goods, the price of frozen fish has risen from CFA 100 (.17 USD) to CFA 300 (.51 USD), and the price of rice has risen from CFA 350 (.59 USD) to CFA 400 (.68 USD)[82]. In terms of local goods, as of December 2014, the price of red palm oil has gone down by 40% and the price of a basket of cassava has fallen from CFA 500 (.85 USD) to CFA 200 (.34 USD).	The government has taken a number of measures to reduce the risk of EVD spreading to the country; these preventative measures have disrupted commodity movements, which seriously impacts livelihoods, income, and access to food, especially in border towns. In particular, the ban on bush meat is depriving many households of an important source of nutrition and income[83].	Labor shortages due to population displacements, fragmentation of markets, and other difficulties related to civil security have had serious negative impacts on agricultural production and food markets in recent years[84].

[72] ACF
[73] GIEWS Bangladesh Country Brief, Reference Date 27 March 2015
[74] WFP
[75] GIEWS Bangladesh Country Brief, Reference Date 27 March 2015
[76] IPC
[77] IPC
[78] GIEWS Burkina Faso Country Brief, Reference Date 27 February 2015
[79] GIEWS Burkina Faso Country Brief, Reference Date 27 February 2015
[80] FAO, Crop Prospects and Food Situation No.1 March 2015
[81] FEWS NET Food Security Outlook : West Africa
[82] FAO in Emergencies
[83] GIEWS, Côte d’Ivoire Country Brief, Reference Date 03 March 2015
[84] GIEWS, Côte d’Ivoire Country Brief, Reference Date 03 March 2015

Djibouti	Prices for wheat flour and rice remain relatively unchanged compared to last year's levels, with a very slight decrease in prices. These staple foods are expected to remain stable through September 2015, except for seasonal peaks during Ramadan[85]. Sugar prices remain stable, and cooking oil prices are 10% lower than they were during the same quarterly period in 2014[86].	Djibouti struggles with inadequate pasture availability and limited access to humanitarian assistance[87]. Improvements in pasture and water availability reported at the beginning of this year are limited by the poor performance of the *Heys/Dadaa* seasonal rains and the delay of the current *Diraac/Soughoum* season. In some areas, particularly the Southwest Pastoral Border Zone, livestock products, such as milk, are becoming more limited than usual[88]. Beginning in May 2015, informal activities such as petty trade, on which the poorest households depend, will decline, as they normally do every year, as extreme temperatures mark the onset of summer[89].	Approximately 160,000 people are severely food insecure, principally in pastoral southeastern areas and in the Obock region[90]. In these areas, Crisis (IPC Phase 3) is expected between July and September 2015[91]. Despite poor rainfall performance, most pastoral households are expected to remain in either Minimal (IPC Phase 1) or Stressed (IPC Phase 2) between April and September 2015, due to continued income from daily labor, sale of livestock, charcoal production, remittances, and continued inter-annual food assistance.[92]
Ethiopia	Prices of coarse grains declined significantly over the past six months, especially in markets located in main producing areas, due to the commercialization of "belg" and "meher" season crops[93]. Prices of maize in December 2014 were between 3 and 30% below levels of 12 months earlier in most markets; in Addis Ababa, they were 8% higher due to sustained local demand. Prices of wheat, teff, and white sorghum were mostly stable in recent months, and in December they were around the same levels of the previous year[94].	According to the Greater Horn of Africa Climate Outlook Forum, normal to above-normal rains are forecast from March through May in parts of western Ethiopia - The food security situation is likely to improve in these areas once harvests start in July/August 2015. However, normal to below-normal rains are forecast for most areas of the country, which could lead to further deterioration of pasture and water resources[95]. Well below-average pasture conditions are now reported in parts of SNNPR, Oromia, and Somali regions of Ethiopia[96].	Food security conditions continue to improve as newly-harvested "meher" crops are available for consumption[97]. However, an estimated 3.2 million people are in need of humanitarian assistance, mainly in pastoral areas[98], due largely in part to reduced localized crop production. Food stocks are quickly running out in parts of Oromia region that harvested a below-average production at the end of 2014[99].

[85] FEWS NET Djibouti Food Security Outlook April 2015
[86] WFP, The Market Monitor, Issue 27 April 2015
[87] FAO, Crop Prospects and Food Situation No.1 March 2015
[88] FEWS NET Djibouti Food Security Outlook April 2015
[89] FEWS NET Djibouti Food Security Outlook April 2015
[90] FAO, Crop Prospects and Food Situation No.1 March 2015
[91] FEWS NET Djibouti Food Security Outlook April 2015
[92] FEWS NET Djibouti Food Security Outlook April 2015
[93] FAO, Crop Prospects and Food Situation No.1 March 2015
[94] GIEWS, Ethiopia Country Brief, Reference Date 23 January 2015
[95] WFP Global Food Security Update Issue 17 March 2015
[96] FAO, Crop Prospects and Food Situation No.1 March 2015
[97] GIEWS, Ethiopia Country Brief, Reference Date 23 January 2015
[98] FAO, Crop Prospects and Food Situation No.1 March 2015
[99] FAO, Crop Prospects and Food Situation No.1 March 2015

Guinea	Prices of local rice fell in several markets in recent months and remained below their levels of a year earlier[100]. The downward trend in prices of local rice is driven mostly by increased supplies from the recently-completed harvests combined with subdued demand due to the impact of the Ebola Virus Disease (EVD) on economic activities and income[101]. Prices of imported rice remained unchanged or decreased[102].	In spite of the relatively low impact of EVD on agricultural production at the national level, its impact on economic activities and livelihoods in Guinea has severely affected household food security in the main affected areas. The disruption of food chains due to the closing of markets, road blocks, and quarantines, restricted cross border trading, as well as changes in traders' behavior due to the fear of Ebola significantly reduced the income of EVD-affected communities for producers, consumers, and traders. Production of rice, the main staple crop in the Mano River region, is estimated to have declined by 4% in Guinea. Cereal import requirements in 2015 are estimated at 445,000 tons[103].	Nearly 1 million people are thought to be severely food insecure, of which 230,000 people are affected by EVD[104].Among income groups, petty traders and unskilled laborers have the highest share of food insecure people[105].
Haiti	Prices of main staple imported rice, which represents 80% of domestic consumption, remained stable in most markets and declined in the capital, Port-au-Prince, following trends in prices from the USA, the country's main supplier[106]. Prices remain stable for local maize and imported vegetable oil, whereas prices for wheat flour are increasing (>+10%)[107].	As of December 2014, cereal imports in the 2014/15 marketing year (July/June) are forecast at 705,000 tons, a 7% increase above last year's level. The increase mainly reflects higher imports of rice and maize, which are expected to increase by 8 and 18 percent, respectively, from 2013, due to a sharp drop in 2014 production. The 2014 maize production reached a 10-year low as a result of severe drought conditions during the main first season, accounting for more than half of annual production. As a result, maize import requirements are forecast at a record level[108].	Food insecurity is forecast to increase during the March–June lean season, with Crisis (IPC3) levels of food insecurity predicted in areas of the South East, Gonave Island and in the North West[109]. Preliminary assessments point to 16,000 families being affected by the drop in production in the Central Plateau, North-West, South-East, and Western region of the country. These families currently receive aid in the form of food vouchers from the Haitian government and from other UN agencies, and benefit from cash-for-work programs from WFP[110].

100 GIEWS, Guinea Country Brief, Reference Date 28 January 2015
101 FAO, Crop Prospects and Food Situation No.1 March 2015
102 FAO, Crop Prospects and Food Situation No.1 March 2015
103 FAO, Crop Prospects and Food Situation No.1 March 2015
104 FAO, Crop Prospects and Food Situation No.1 March 2015
105 GIEWS, Guinea Country Brief, Reference Date 28 January 2015
106 GIEWS, Haiti Country Brief 2 December 2014
107 WFP, The Market Monitor, Issue 27 April 2015
108 FAO, Crop Prospects and Food Situation No.1 March 2015
109 WFP Global Food Security Update Issue 17 March 2015
110 GIEWS, Haiti Country Brief 2 December 2014

India	Although prices for rice and sugar are decreasing, and prices for wheat remain stable, current prices still represent an 18% (severe) increase over the last five years on the cost of a household food basket[111]. An expected decline in output and quality of the 2015 wheat crop, following adverse weather conditions, has limited further price decreases[112].	Heavy rains and localized hail in March affected the 2015 *Rabi* season wheat crop. The standing wheat crop was negatively affected in its final stages of development, resulting in a predicted 4% drop in output and a lower quality crop. According to preliminary reports, the areas affected account for approximately 80% of nationwide wheat production[113]. In India, cereal production is expected to remain close to the high level of 2014, which is reflected by adequate input supplies and generally favorable weather[114].	Overall food security in India is considered to be satisfactory, given ample food stocks and the provision of highly subsidized rice and wheat through distribution programs, especially for families below the poverty line.[115]
Indonesia	The average price of medium quality rice increased for a third consecutive month, reaching a record high in February, due to the government's "Rice for the Poor" program and a 10% increase in the government's procurement of rice, which had remained unchanged over the last three years. In an attempt to stabilize prices, the government began, on 25 February, to distribute 300,000 tons of subsidized rice at IDR 7,400 (0.57 USD) per kg, about 26% below February's market price[116].	The rainy season in Indonesia is generally from mid-November to March. In January 2015, hundreds of hectares of rice fields and horticultural plots in Langkat regency, North Sumatra, were reported to have been destroyed by floods. Floods also caused harvest failures for other plants such as cassava, peanuts, long beans, and cucumbers[117]. Landslides due to flooding continue to be the deadliest disaster, while hurricanes cause the most destruction – both have significant impacts on food security[118]. The anticipated increase in rice production is mainly attributed to government support in the rehabilitation of irrigation channels and the distribution of subsidized seeds and fertilizers, as well as the expected increase in planted area[119].	In January 2015, an estimated 205,000 people were affected by natural disasters, including 27 casualties, and 75 districts/municipalities were affected by flooding[120].

[111] WFP, The Market Monitor, Issue 27 April 2015
[112] GIEWS, India Country Brief, Reference Date 16 April 2015
[113] GIEWS, India Country Brief, Reference Date 16 April 2015
[114] FAO, Crop Prospects and Food Situation No.1 March 2015
[115] GIEWS, India Country Brief, Reference Date 16 April 2015
[116] GIEWS, Indonesia Country Brief, Reference Date 6 March 2015
[117] Relief Web
[118] OCHA
[119] GIEWS, Indonesia Country Brief, Reference Date 6 March 2015
[120] OCHA

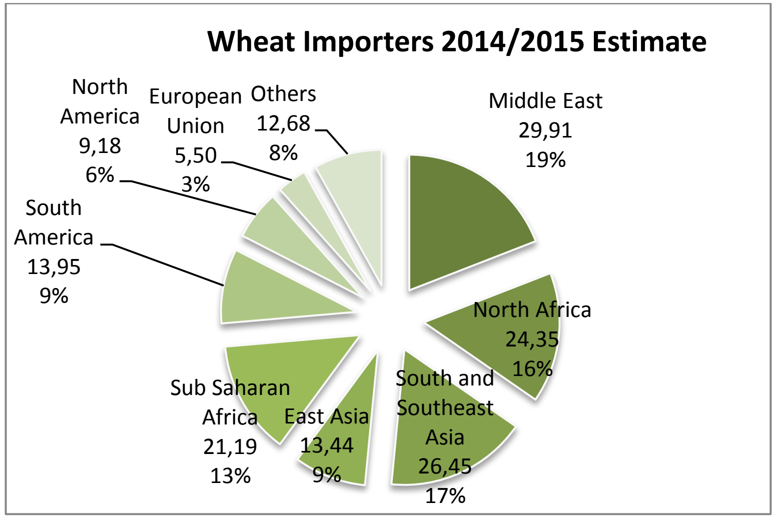
Jordan	Prices for staples in Jordan, namely bread, sugar, vegetable oil, and medium-grain rice, remain stable[121]. Cereal inflation remains low. Despite the budget deficit, wheat bread remains fully subsidized. The government sells wheat flour at 225 USD/ton to bakeries, while market prices near 500 USD/ton. Food inflation is driven by prices of seasonal products, which are set freely[122]. Prices are expected to remain stable throughout the year, due in part to favorable weather conditions.	Cumulative precipitation up to March 2015 in all provinces, except the Al Mafraq governorate, exceeds the long-term average (1989-2012). This wetter-than-usual winter benefits sheep and goat herders by providing adequate pasture conditions and also limits their dependence on other sources of feed, such as subsidized imported barley[123]. Wheat imports are estimated at 925,000 tons, 20% higher than the last five-year average. The increase is due to a rising population and the continued presence of registered refugees, who now comprise approximately 10% of the population[124].	According to the UNHCR, as of late March 2015, an estimated 627,000 Syrian refugees were registered in Jordan – only 4% of these refugees arrived in 2014. The WFP is assisting the most vulnerable refugees through food vouchers in most of the country and through the provision of in-kind food distributions in the Zaatari refugee camp and in transit centers hosting refugees[125].
Myanmar	Wholesale prices of Emata rice, the most commonly consumed variety, increased slightly in February, supported by strong import demand from China. Overall, prices were marginally above their levels of last year[126].	Although Myanmar is a resource-rich country with a strong agricultural base, the 50 million people who live there are among the poorest in the world[127]. Despite an overall stable food security situation, recurrent inter-communal tensions since June 2012 have negatively impacted the food security situation of certain populations[128].	UNHCR estimates that as of July 2014, nearly half a million people remain displaced and food insecure in Rakhine, Kachin, Shan, and southeast areas of Myanmar[129].
Sierra Leone	Food prices rose in line with seasonal trends in March for imported rice (+3%), local rice (+2%) and palm oil (+3%). The higher prices reflect reduced seasonal availability and increased demand due to land preparation. Imported rice prices increased sharply in Bombali/Tonkolili/Koinadugu (+9%), a more remote area of the country that is prone to price fluctuation. Higher palm oil prices are thought to be favorable for households who produce palm oil at this time of year[130].	Anti-Ebola measures in Sierra Leone are resulting in greater disruptions to livelihoods and market functioning in Sierra Leone compared to Guinea and Liberia. Although off-season cropping and the start of land preparation activities provided many rural households with a certain level of food and income in March 2015, household incomes from the most typical sources remains below average; weak purchasing power is expected to be the key driver of acute food insecurity across the region between March and June 2015.[131]	Household food consumption is expected to deteriorate in the next four to six months because of reduced purchasing power and lower food stocks caused by EVD[132].The worst affected areas are expected to be in Crisis (IPC Phase 3) for poor and very poor households by June 2015. Other areas of Sierra Leone are expected to have Stressed (IPC Phase 2) levels of food insecurity[133].

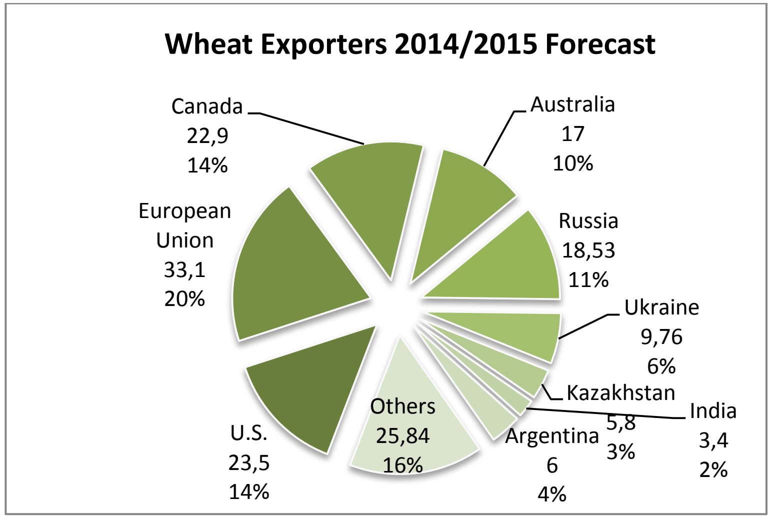
[121] WFP, The Market Monitor, Issue 27 April 2015
[122] GIEWS, Jordan Country Brief, Reference Date 9 April 2015
[123] GIEWS, Jordan Country Brief, Reference Date 9 April 2015
[124] GIEWS, Jordan Country Brief, Reference Date 9 April 2015
[125] GIEWS, Jordan Country Brief, Reference Date 9 April 2015
[126] GIEWS, Myanmar Country Brief, Reference Date 10 March 2015
[127] OCHA
[128] GIEWS, Myanmar Country Brief, Reference Date 10 March 2015
[129] GIEWS Myanmar Country Brief, Reference Date 10 March 2015
[130] WFP mVAM Bulletin Sierra Leone No. 15 2015
[131] FEWS NET, Sierre Leone Remote Monitoring Report, March 2015
[132] WFP Global Food Security Update Issue 17 March 2015
[133] FEWS NET, Sierre Leone Remote Monitoring Report, March 2015

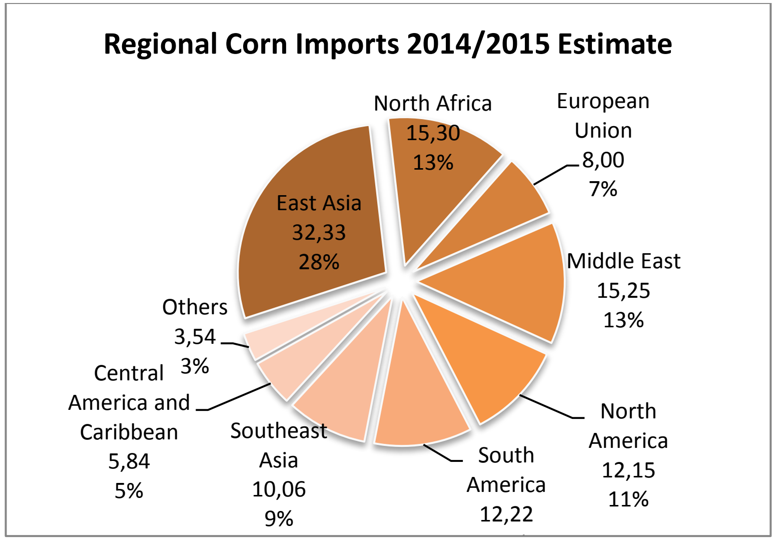
Zimbabwe	Prices of maize are generally below their year-earlier levels as of January 2015. Lower fuel prices and a stronger US dollar (the most popular currency in the country) against the South African Rand, where a large proportion of food imports come from, have also contributed to lowering upward price pressure[134]. Prices for Zimbabwe's two staple foods (maize meal and vegetable oil) are decreasing. Maize is being sold at prices 20% below those of the same month last year, and 14% below those of the same three-month time period[135].	Cereal production in 2015 is expected to decrease, largely due to drier weather in southern parts of the country. Poor households in southern deficit areas experienced poor production this season due to the late start of the season, erratic rains, and prolonged dry spells[136]. Weather forecasts for March- May 2015 indicate that southern provinces will receive normal to below-normal rains, which would offer limited potential for crops to recover from water stress[137].	An estimated 331,000 people continue to require food assistance, although the overall food security situation is stable. There has been a 78 % decrease in the number of food insecure persons compared to 2014, largely due to improved maize supplies[138]. Food security is likely to be aggravated in 2015/16, particularly in southern areas. In the absence of any assistance in these areas, households will likely be in Crisis from July through September[139].

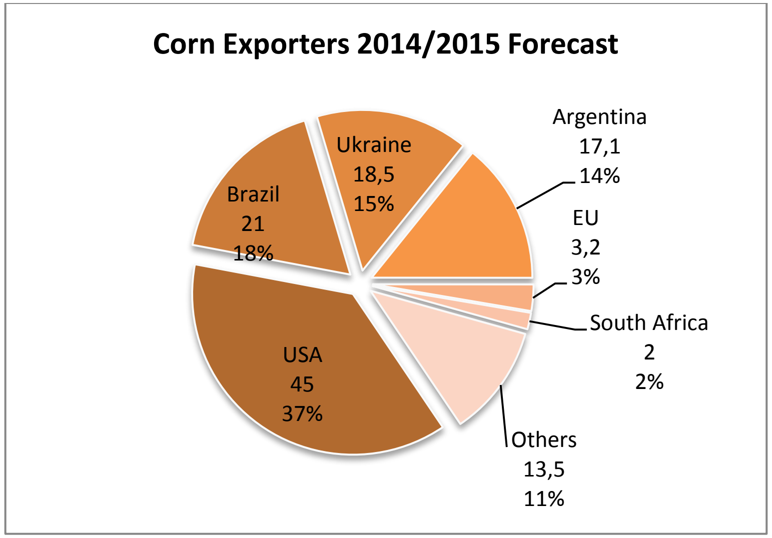
[134] GIEWS, Zimbabwe Country Brief, Reference Date 17 March 2015
[135] WFP, The Market Monitor, Issue 27 April 2015
[136] FEWS NET Zimbabwe Food Security Outlook April 2015
[137] GIEWS, Zimbabwe Country Brief, Reference Date 17 March 2015
[138] FAO
[139] FEWS NET Zimbabwe Food Security Outlook April 2015

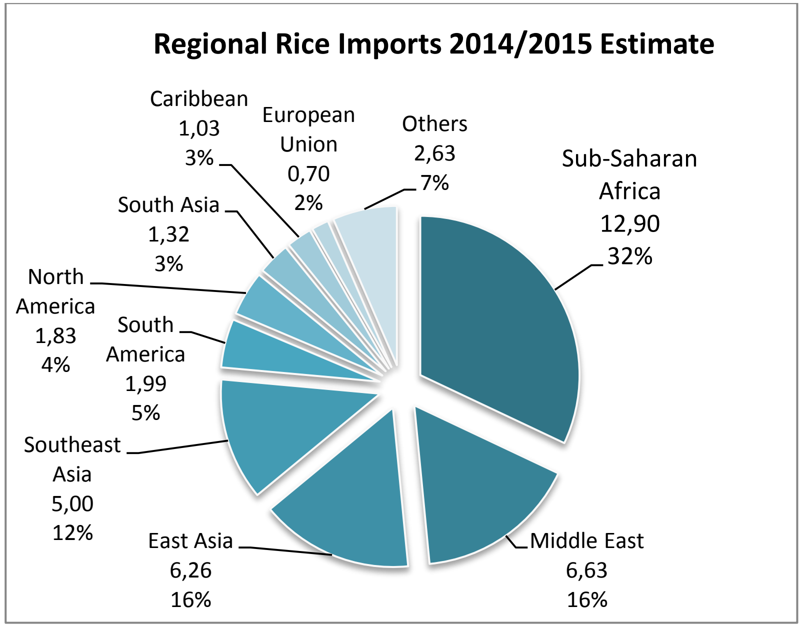
International Exchanges

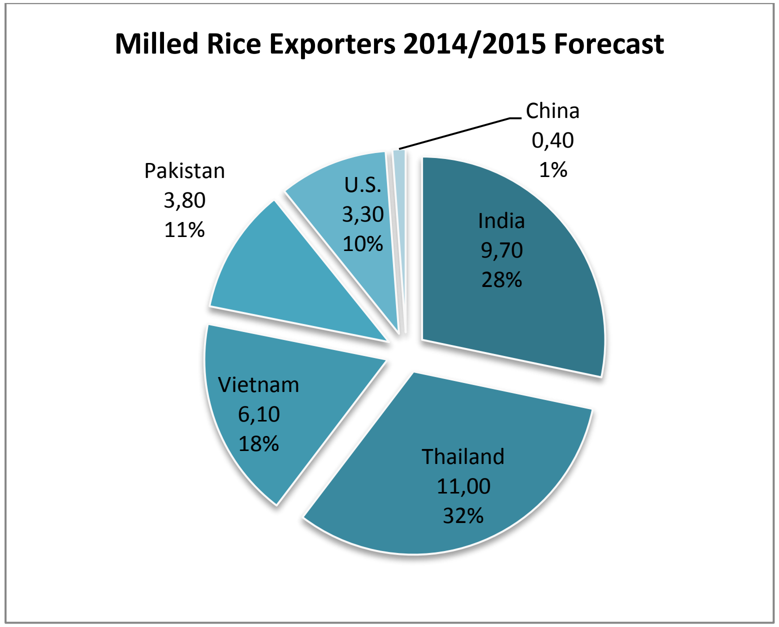












Source for Imports Data: United States Department of Agriculture, Foreign Agricultural Service, data from April 2015
Source for Exports Data: International Grains Council, data from April 2015

The Price Surveillance Bulletin is prepared and updated by the Expertise and Advocacy Department at Action Contre la Faim-France. ACF edits the bulletin on a quarterly basis. The bulletin presents the evolution of food prices in various countries, including in countries where ACF is active, by gathering data from different organizations, actors, and relevant sources. The evolution of prices in countries on alert, listed in red, is updated on a monthly basis. The Price Surveillance Bulletin and its updates are available online at the following URL address: http://www.actioncontrelafaim.org/actualites/publications.

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