Price Surveillance Bulletin

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Evolution of Food Prices at a global scale and Main Determinants

Abundant supplies and strong export competition kept international grain prices low, with quotations of wheat and maize in January averaging well below their year-earlier levels. International rice prices followed mixed trends depending on the origin.[1] The **FAO Cereal Price Index** declined 1, 7 % in from December bellow January. Ample global supplies, increased competition for export markets and a strong US dollar continued to weigh on international wheat and maize prices, with the US maize quotations falling to multi-year lows. Rice prices declined only marginally.[2] During Q4 (quarter) -2015, FAO's global cereal price index fell by a further 15.2% year-on-year because of abundant supplies and sluggish demand. The index returned to the level seen before the food price crisis of 2007-08. [3]

- **WHEAT:** The real price of wheat dropped by 8% over the last quarter. It fell by more than 25 % compared with Q4-2014 mainly because of world record production and higher ending stocks.[4] The benchmark US wheat price is averaged more than one-quarter down from a year earlier. A weaker US dollar in early December and larger export sales underpinned prices. Concerns about the impact of unusual dry weather and mild temperature on winter wheat in the Northern Hemisphere also provided support. However, the upward pressure was short-lived as supplies remain large and competition for export markets has intensified. Export prices from other countries generally weakened in December, particularly in Argentina with the nearly-harvested 2015 crop.[5]

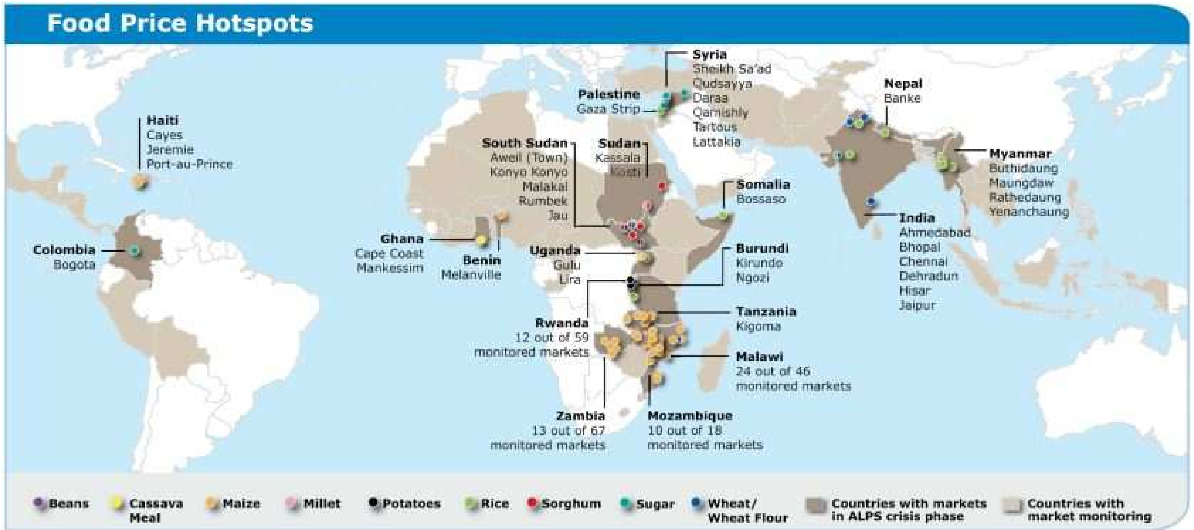
- **MAISE:** The real price of maize remained constant compared with Q3-2015. Despite lower than expected production forecasts for 2015/16, global supplies were comfortable amid above-average closing stocks.[6] The international benchmark US maize is 8% lower than the corresponding period last year. Despite a weaker US dollar and an increase in export sales at the start of the month, export quotations remained overall under downward pressure, reflecting abundant world supplies and slow trade amid increased competition from other exporters, especially South America. Maize export prices from Ukraine changed little, while they increased in Brazil supported by strong export demand.[7]

- **RICE:** During Q4-2015, the real price of rice decreased by two percent. As in Q3, prices were 15 percent below 2014 levels. However, global rice supplies may tighten in 2015/16.[8] The FAO All Rice Price index averaged 12 percent below its level in December 2014. The arrival of new crop supplies generally weighed on Thai quotations, in particular for the fragrant varieties. In the Americas, prices generally declined in Argentina, the United States and Uruguay, while they continued to firm in Brazil, on a tightening of supplies.[9]

[1] FAO FPMA bulletin monthly report on food price trends, February 2016
[2] FAO Food Index Price , February 2016
[3] WFP the market monitor, January 2016
[4] WFP the market monitor, January 2016
[5] FAO Food Price Monitoring, January 2016
[6] WFP the market monitor, January 2016
[7] FAO Food Price Monitoring, January 2016
[8] WFP the market monitor, January 2016
[9] FAO Food Price Monitoring, January 2016

Countries requiring vigilance

- **Cameroon:** The cost of the minimum food basket increased severely during Q4-2015 in Cameroon with 48% for cassava and 22% for sorghum.[10]
- **South Soudan:** : In January 2016, the annual inflation rate increased by 165%, mainly on account of elevated cost of transport, hotel and restaurant services, bread and cereals. The rising cost of living is piling additional pressure on households that highly depend on markets particularly urban poor and vulnerable populations in rural areas. The national food market remains tight. On the demand side the evolving economic downturn has reduced income earning opportunities for many urban poor households while at the same time wiping out their purchasing power. On the supply side, availability of grains and legumes are limited in most areas due to reduced import flows and low local production in the last season; while imported food prices continue to rise, primarily because of the currency devaluation, in spite of the government waiver of import duties for imported foods[11]
- **Syrian Republic Arab:** Currently a liter of diesel in Deir ez-Zor is being sold at 1,435 SYP, which is 10 times higher than last year and more than seven times compared to the price in Damascus. While in Darayya City, a liter of diesel is sold at 2,500 SYP, gas cylinder 30,000 SYP, high prices that are not affordable for most households. Prices of basic goods are extremely high in besieged areas. In Deir ez-Zor, for example, the cost of the standard food basket was SYP 240,000 which is 16 times higher compared to their pre-siege prices of SYP 15,000 and 12 times higher than the cost of the same food basket in central Damascus. In East Ghouta and Qudsayya, the food basket costs at least 2 to 3 times more than Damascus central market.[12]



Source: WFP the Market Monitor, January 2016

[10] WFP The Market Monitor , January 2016

[11] WFP South Sudan market price monitoring bulletin, January 2016

[12] WFP Syria - Worsening food security conditions in besieged areas, January 2016

Prices Surveillance by Country

Country	Main Staple Food Price Trends	Other Elements Impacting Food Security	Severity and Potential Actions
Cameroon	In Cameroon, prices changed sharply because erratic rainfall compromised crop development before the second harvest season (+48% cassava, + 22% sorghum and + 5% rice). All food prices have increased compared to last year from 10% for cassava, 24% for maize, 60% for red sorghum up to 70% for local rice. [13]	Cameroon continues to face a complex and multilayered humanitarian crisis. Boko Haram-related violence has led to the internal displacement of 92.000 Cameroonians and the influx of some 65.000 Nigerians who have sought refuge in the Far North region.[14] Furthermore, assessments continue to show that people fleeing the escalating violence have left their productive assets behind, compromising their livelihoods and consequently disrupting agricultural production.[15]	1.4 million Persons in the worst-affected areas of Far North Cameroon who are considered moderately to severely food insecure.[16] The number of food insecure people has more than doubled in Cameroon since June 2015 – now at 2 million.[17]
Ethiopia	In December 2015, the overall year-on-year inflation rate was 10%; the food inflation rate was higher, at 12.1%. Regionally, there were wide disparities: the highest inflation rate was recorded in Afar (15.6%), followed by Addis Ababa and Oromia (12.5). Compared to the long term average (2010-2014), the national average white wheat prices increased by	The current El Niño wreaked havoc on Ethiopia's summer rains in 2015. This comes on the heels of failed spring rains, and it has led to food insecurity, malnutrition and water shortages throughout the country.[19] Eastern Ethiopia had a severe drought that contributed to low crop production for the Belg and Meher harvests, poor livestock health, low water availability, and lack of demand for agricultural labor. Significant livestock mortalities,	Early estimates by the Ethiopia Humanitarian Country Team (EHCT) were that up to 15 million people will require food assistance in 2016. This includes around 7 to 8 million people needing emergency food assistance. The highest number of people in need and the most severe food insecurity are likely to be during the peak lean

[13] WFP The Market Monitor , January 2016
[14] OCHA Global Humanitarian overview, January 2016
[15] WFP insecurity in the lake chad basin – reginal impacts, January 2016
[16] WFP insecurity in the lake chad basin – reginal impacts, January 2016
[17] FAO- FAO in the humanitarian appeals 2015-mid-year-update, January 2016
[19] OCHA, Global Humanitarian overview, January 2016

	29%. Unprocessed pulse wholesale prices remained at elevated levels across all wholesale markets which indicate supply constraints. Over the last 12 months, pulse prices have been continually increasing, in particular lentil prices. Prices of lentils, fava beans, field peas and chickpeas have almost increased by 50% or a bit more over the last 12 months. We also have the reduction of the purchase price of coffee at the farmers' cooperatives, which means a loss of significant gain with a price between 7 and 11 Bihr / kilo against 15 Bihr normally."[18]	eroded purchasing capacities, widening consumption gaps; extreme water scarcity jeopardize food security.[20]	season in Meher-producing areas from June to September 2016. As recovery of assets may take a long time in northern pastoral areas, many households in southern Afar and Sitti Zone may remain in Emergency (IPC Phase 4), in the absence of humanitarian assistance, for much of 2016.[21]
Nepal	Compared to the same period last year, most prices showed an upward trend (with the exception of red potato). Overall, the price of most commodities over the past 12 months showed an upward trend with expected seasonal fluctuations, while that of black gram and broken lentil have remained high since May 2015. The inflation rate, as measured by the year-on-year increase in	Nepal's devastating earthquakes of 25 April and 12 May 2015 struck just as farmers were harvesting wheat, planting maize and approaching the rice sowing season. In the six most affected districts, around 50 percent of farming families lost nearly all of their stored crops. Many farmers also lost seed stocks, which are now difficult to source in local markets and may lead to crop shortages during the summer and winter seasons.[23]	In the far western region, the DFSN (District Food Security Networks)in Bajura indicated a potential deterioration in the food security situation, with 10 VDCs possibly being classified as severely food insecure (Phase 4) and 17 VDCs (Village Development Committees) likely to be classified as highly food insecure (Phase 3) due to the lean agricultural

[18] WFP Ethiopia monthly market watch, December 2015
[20] FEWSNET, Ethiopia large scale food security emergency projected for 2016, October 2015 to march 2016
[21] FEWSNET, Ethiopia large scale food security emergency projected for 2016, October 2015 to march 2016
[23] FAO-FAO in the humanitarian appeals 2015-mid-year-update, January 2016

	the CPI, was 11.6 percent. The food and beverage group of the consumer price index (CPI released by Nepal) was 14.8 % year-on-year; several sub-groups showed higher year-on-year increases: legume varieties (48.9 %), ghee and oil (42.3 %), fruit (14.3 %) and meat and fish (13.9%).[22]		period, limited wage employment opportunities, less remittance inflow, possible food price hikes and the phasing out of the Rural Construction and Infrastructure Works (RCIW) Programme. Similarly, in the Karnali, the DFSN in Mugu projected that the 12 VDCs currently classified as highly food insecure (Phase 3) might become severely food insecure (Phase 4) because a large (85 percent) production drop in summer crops. Furthermore, DFSNs anticipated that 7 VDCs of Dolpa, 17 VDCs of Humla, 12 VDCs of Mugu and 10 VDCs of Kalikot will likely be classified as highly food insecure (Phase 3). In all of these districts, DFSNs attributed the scenario to production drops in summer crops and food price hikes.[24]
South Soudan	The prices of cereals continued to increase, defying seasonal trends. In Juba, the sorghum price was 302% higher than December 2014, whereas in Rumbek and Kuajok, retail white sorghum increase by	Despite the signing of a peace agreement in August 2015, conflict in South Sudan has continued to cause deep suffering and humanitarian needs for civilians in large parts of the country. Fighting between armed actors and intercommunal	It is projected that about 2.4 million people (a 60% increase from same period last year) will continue to face severe food and nutrition insecurity, the majority of whom are in Unity,

[22] WFP Nepal- Market Watch, December 2015

[24] Ministry of Agricultural Development and WFP Nepal Food Security Monitoring System Outlook: mid-November 2015 to mid-March 2016

	146 and 170% respectively over same time.[25] In January 2016 the consumer price index (CPI) increased by 165% an all-time peak, on account of elevated prices for transport, hotel & restaurant services, bread and cereals. The annual CPI increased in Juba by 153% and in Wau by 172.7% from January 2015 to January 2016. Latest figures from the National Bureau of Statistics indicate that the current inflation is the worst in South Sudan history, recording the highest level since the basket was rebased in June 2011. Month-on-month inflation remained volatile and high (22.3% from December 2015 to January 2016), the highest monthly inflation since the beginning of "rising price period" that started in March 2015.[26]	violence continue to spread, forcing people to flee. Disease, economic decline and price hikes exhausted the coping capacity of populations in Unity and Upper Nile, Jonglei, Lakes, Western Equatoria and Central Equatoria states. Overall, nearly 2.3 million people (about 25% of the population) are displaced, of whom more than 1.6 million are displaced within South Sudan.[27]	Upper Nile and Jonglei States. Further, in the period just before the start of the lean season (January to March) an estimated 2.6 million will remain severely food and nutrition insecure and 440.000 people would be in Emergency (IPC Phase 4).[28]
Syrian Arab Republic	According to the WFP Market Monitor, the impact of staple food price changes on the cost of the basic food basket from October to December 2015 was severe. Ongoing conflict continued to disrupt trade and access to food: seasonally	Nearly five years into the crisis in Syria, the country's humanitarian situation continues to deteriorate, with a devastating impact on the lives of millions of Syrians. The conflict is estimated to make over half of the population displaced, including 1.2 million people in 2015, many for the	Inside Syria, 4.5 million people are living in hard to reach and besieged areas. 2.5 million People living in these areas are severely food insecure. 400,000 severely food insecure people live in besieged areas (Deir EzZor city,

[25] WFP South Soudan market price monitoring bulletin, December 2015
[26] WFP South Sudan market price monitoring bulletin, January 2016
[27] OCHA, Global Humanitarian overview, January 2016
[28] IPC, the Republic of South Soudan, September 2015

	adjusted prices surged for sugar (+23%) and oil (+21%). The besieged governorate of Deir Ezzor recorded the highest quarterly price increase (+27% sugar and +62% oil); sugar and oil were respectively 17 and 10 times more expensive than last year.[29]	second or third time. Over 4.2 million Syrians are now refugees.[30]	Daraya, Madaya, Foah and Kafraya, East Ghouta, ArRastan, etc.) while 2.1 million live in hard to reach areas in Ar-Raqqa, Aleppo, Homs, Hama, Dara'a, Idlib governorates and Deir-ez-Zor rural.[31] The number of moderately or severely food insecure Syrian refugees in Lebanon has burgeoned since 2014. Out of the 1,174,690 Syrian refugees registered with UNHCR by June 2015, about 763,549 were estimated to be mildly food insecure, 272,528 moderately food insecure and 5,873 severely food insecure. Just 129,216 were considered food secure[32]
Yemen	In Yemen, food availability improved in December 2015 keeping quarterly price increased in check for wheat flour (+7%), sugar (+5%) and vegetable oil (+12%) by comparison with previous surges. Yet, wheat flour increased significantly in Amran (+17%), Hajjah (+18%), Sa'ada (15%) and Al Hudaydah (+10%) in the fourth quarter. Wheat flour and oil prices	More than 2.3 million people have been forced to flee their homes and violence and import restrictions have accelerated a decline in living conditions and reversed the fragile improvements recorded in late 2014.[34] The December Task Force Population Movements (TFPM) report estimated that the number of internally displaced persons (IDPs) was approximately 2.509.062, a nine percent increase since October. The displaced continue to	Food security has continued to deteriorate, with initial analysis estimating that 14.4 million people are now food insecure including 7.6 million who are severely food insecure. Nearly six in 10 Yemenis need food security or livelihoods support including three in 10 who need immediate life-saving food

[29] WFP Syria - Worsening food security conditions in besieged areas, January 2016
[30] OCHA Global Humanitarian overview, January 2016
[31] WFP Syria - Worsening food security conditions in besieged areas, January 2016
[32] WFP Vulnerability assessment of Syrian refugees in Lebanon, 2015
[34] OCHA, Global Humanitarian overview, January 2016

	increased 15% and 14% respectively compared to the same month last year. However sugar prices decline 3% in the same moment. A chronic fuel shortage pushed prices up in Yemen: q/q prices rose by 19.5% for gasoline and by 13% for diesel; y/y price increases were at record levels (+269.6% gasoline; +248.4% diesel).[33]	have limited access food and income, and they place additional burdens on the financial, water, food, and other resources of the host community.[35] The fragile food security situation may likely to remain unchanged for the majority of the population in the country whose livelihoods have seriously been disrupted and coping mechanisms severely eroded.[36]	assistance.[37]
Zimbabwe	The national average maize grain price for December is 42% higher compared the same month last year and 39% from the same quarterly last year.[38] Maize grain prices will continue to be atypically high. In the Northern provinces prices are expected between above last year and the five-year average until at least march. Price levels in the southern provinces, though likely to remain higher than in the	The country had received below average rainfall with some southern and western areas receiving less than half of normal rainfall amounts for this period. Areas planted with cereals is significantly lower than last year, a below average season. A high proportion of households in the south did not plant due to persistent dryness. In northern parts of the country, crops are in fair condition; however some are experiencing moisture stress in some marginal areas.	The food security situation is expected to worsen during this last quarter of the 2015/16 consumption year with the proportion of the rural households who are deemed food insecure doubling from the May 2015 projection of 16% to 30%.[41] The food security situation between January and March 2016 will largely depend on the levels of humanitarian assistance, especially in the south.[42]

[33] WFP the market monitor, January 2016
[35] FEWSNET Food Security Update, December 2015
[36] WFP Yemen- Monthly Market Watch, December 2015
[37] OCHA Yemen humanitarian need overview, November 2015
[38] WPF The Market Monitor, January 2016

	northern areas, will be largely cushioned, and influenced by maize flour supplies.[39]	Drought as a result of the ongoing El Niño has resulted in poor to critical water and pasture conditions in the south and parts of the north. As a result, higher than normal cattle deaths have been recorded. Typical livelihood and coping options such as on- and off-farm casual labor continue to be limited in most areas between January and March. Zimbabwe is exposed countries to such increases.[40]	
Afghanistan	Wheat prices were generally above the five-year average in December, but similar to the previous year. In Jalalabad, Maimana, and Mazar-i-Sharif, wheat prices were similar to last year but were above the five-year average by 12, 15, and 20%, respectively. In Kabul, there was a 4% increase in the price of wheat compared to December 2014, and a 17% increase above the five-year average.[43] Compared to the same month one year ago (December 2014), the average wheat price slightly decreased by 0.4%, On the two-year comparison (December 2013),	Acute food insecurity in this post-harvest situation is a result of high insecurity causing limited market functionality that distorts food prices; deteriorating purchasing power of the poor, lower resilience of disaster affected populations; and serious erosion or depletion of livelihood assets during a hard 2015 lean season in many provinces.[45]	An estimated 208.000 people are classified in acute food insecurity emergency over September to November 2015. They are unable to meet their food consumption needs. Projected situation November 2015 to march 2016 provide that in three provinces Badhakshan, Kunduz and Paktika 10 to 15% of the population are in Phase 4 Emergency situation that would need lives and livelihoods saving support.[46]

[41] ZimVac January 2016
[42] FEWSNET Anticipated below normal seasonal rains will constrain food access in the south, October 2015 – march 2016
[39] FEWSNET Anticipated below normal seasonal rains will constrain food access in the south, October 2015 – march 2016
[40] FEWSNET Drought conditions expected to affect planted and crop conditions this season, January 2016
[43] FEWSNET, Afghanistan food security outlook update, January 2016
[45] IPC, Afghanistan : indicative current (Sep.- Nov. 2015) and projected (nov.2015-march 2016) acute food insecurity situation
[46] IPC, Afghanistan : indicative current (Sep.- Nov. 2015) and projected (nov.2015-march 2016) acute food insecurity situation

	the average price slightly increased by 8.5% and the last 5-year comparison average price of the same months (December 2010 - 2014), the price significantly increased by 15.5%.[44]		
Central Africa Republic	According to FAO, the average inflation rate, which jumped from a low 1.5% in 2013 to 15% in 2014, mainly due to the increase in food price inflation and disruption exchanges, dropped to 8% in 2015, mainly due to a slight improvement security and oil prices fall. However, constraints to crop production and sectors of livestock and fisheries will continue to support the high prices of food and general inflation, due to insecurity.[47]	The conflict situation did not change significantly in January 2016. According to the Commission of Population Movement, the number of internally displaced people has not increased since the peak of 469,307 persons registered in November 2015 and estimated at 470,000 in January 2016. But the quiet, currently noted in favor of the hopes associated with presidential and general elections, remains fragile and could tip at any time depending on the outcome of the second series of elections. There is also a food crop which is in deficit for three consecutive crop years with a corresponding deterioration of livelihoods and reduced flows and supplies especially those in the Northwest market, the Centre and the South West most affected by the continuing conflict. Following these adverse conditions, food availability remains a concern in these areas despite the humanitarian assistances.[48]	In September 2015, half of the population (50.5%) was in food insecure, a bit less than 2 million. Approximately 15.2 percent of the population is in severe food insecurity, about 586,000 people. These households have very poor food consumption; they are vulnerable and resort to emergency called coping strategies that threaten their future livelihoods of Irreversibly. 35.3% is in moderate food insecurity, about 1 million 360 thousand people.[49] One in six women, men and children struggle with severe or extreme food insecurity, while one in three are moderate food insecure, not knowing where their next meal is coming from.[50]

[44] WFP, vulnerability Analysis and Mapping (VAM)- Afghanistan, December 2015
[47] WFP République Centrafricaine- Evolution de la sécurité alimentaire en Situation d'urgence, Décembre 2015
[48] FEWSNET, La situation d'insécurité alimentaire persiste malgré le calme sécuritaire, Janvier 2016
[49] WFP République Centrafricaine- Evolution de la sécurité alimentaire en Situation d'urgence, Décembre 2015
[50] OCHA Car humanitarian Bulletin, January 2016

Chad	Late rains delayed planting and drove up seasonal cereal prices in Lake and southern regions: Hadjer Lamis (+13% sorghum, +10% millet and +19% for maize) and Longone Oriental (+17% sorghum and +9% for millet). Sorghum and millet prices increase 5 and 1% respectively and maize decrease 3%.[51]	Insecurity in the Lac region prevails, with several suicide-attacks reported at the end of the year 2015 while the state of emergency is still in place. The security context limits access to markets but also humanitarian assistance compromising food security.[52]	The EFSA (the emergency food security assessment) covered 96,058 IDPs registered by the Chadian authorities. It indicated that 35% of the IDPs are affected by food insecurity of which 4 percent are affected by severe food insecurity. Among this population, two of three displaced households have accumulated debt in the last three months. Results also indicate that 5.8 percent of children are moderately malnourished while 0.3 percent has a severe form of malnutrition.[53].
Haiti	In Haiti, quarterly prices for local maize were 16% up in the Sud Est because of heavy crop losses. The ALPS indicator was at crisis level for maize in Jeremie and Port-au-Prince. Imported wheat flour and vegetable oil are 18% and 8% higher respectively compared to last year at the same month, local maize increased 36%.[54]	Severe drought in Haiti has caused many farmers to lose a significant part of the harvest they depend on to feed their families. Also, many vulnerable rural households lost part of their income due to the decrease of agricultural work opportunities which mean loss or purchasing power.[55] According to FEWS Net projections, the number of Haitians facing a crisis level of food insecurity could rise to 1.5 million by March 2016.[56]	More than 3, 6 million people estimated in food insecure / out of which 1, 5 million are severely food insecure.[57]

[51] WFP the market monitor, January 2016
[52] OCHA Chad Situation in the Lac region and the impact of the Nigerian crisis, December 2015- January 2016
[53] WFP Country Brief Chad, July- September2015
[54] WFP The Market Monitor, January 2016
[55] EFSA WFP assessment conducted in December 2015
[56] WFP- FAO 2015- 2016 El Niño Monitoring countries, January 2016

Indonesia	The seasonally adjusted price for sugar increased slightly in Indonesia (+1%). Rice, vegetable oil, sugar and wheat prices are all increase respectively 8%, 5%, 13% and 2% compared the same month from last year.[58] In addition to the rising trend, recent prices are also at relatively high levels, even after adjusting for inflation. The price in November, after taking account of inflation and seasonality, is 9.2% higher than average prices over the past four years. Furthermore, domestic prices are substantially above world market prices, by approximately 80% (after adjusting for quality and marketing and transport costs).[59]	Following a delay in the onset of the monsoon season, rains have started in most of Indonesia. However parts of eastern Indonesia continue to face severe drought. An estimated 3 million Indonesians live below the poverty line in severely drought impacted districts with 1.2 million of these reliant on rainfall for their food production livelihood. Late onset of rains and subsequent delays in planting have two critical cascading effects: extension of the lean season and increased exposure of the second rice planting to peak dry season which increases the probability of crop damage or failure.[60]	In total, 3 million Indonesians living in these 38 districts will face significant challenges in meeting basic requirements as they already live in poverty. Among these, 1.2 million are in need of assistance as they are dependent on rainfall for their livelihoods as food producing farmers and reside in areas highly impacted by drought.[61]
Iraq	December mVAM market data indicates that the average cost of a standard food basket increased by 12% in Salah Al-Din. Meanwhile in Anbar, following several months of steadily increasing food prices, the trend finally showed a decline; however, in conflict affected Ramadi,	As of December 2015, there were about 3.2 million people displaced within Iraq, of whom nearly 2 million have been displaced since January 2014. Many of these people have been repeatedly displaced. In addition, heavy rains in late October caused flooding which affected at least 84 000 displaced people staying in more than 40sites and	An estimated 2.4 million people are food insecure, and malnutrition is emerging.[65] Loss of assets and income opportunities from farming, together with disruptions in marketing activities and related logistics, have exposed

[57] EFSA WFP assessment conducted in December 2015
[58] WFP The Market Monitor, January 2016
[59] WFP Indonesia food security monitoring Bulletin, January 2016
[60] WFP Indonesia food security monitoring Bulletin, January 2016
[61] WFP Indonesia food security monitoring Bulletin, January 2016
[65] OCHA Global Humanitarian Overview, January 2016

	Khalidiyah and Fallujah districts, the cost of a food basket was 24, 41 and 38% higher than the governorate average respectively.[62] Reduced distribution of wheat flour via the PDS is supporting high flour prices in the governorates most affected by the conflict. Wheat flour and sugar prices in Anbar are more than 50% higher in Baghdad. Conflict-disrupted supply lines are resulting in shortages of fresh fruits, meat, dairy and eggs. The governorates with relatively good access report more stable market prices.[63]	camps, mostly in Baghdad and Anbar governorates. Conflict is negatively affecting food security of the Iraqi population. One out of four IDP households is using negative coping strategies. Among displaced people, about 70% report poor and borderline level food consumption scores in Anbar, Kirkuk, Ninewa, and Salahedin governorates.[64]	large number of people to severe food insecurity.[66]
Jordan	In Jordan, the appreciation of the Jordanian dinar pulled down the annual headline inflation by 21.7%, due to the sharp drop in exports and cheaper imported products. Compared to the last year at the same month bread price are not changed, vegetable oil increase by 7% and sugar and imported rice decrease respectively by -6% and -1%.[67]	Jordan is a resource-poor, food-deficient country with limited agricultural land, no energy resources and scarce water supply. By November 2015, over 632,000 Syrian refugees were registered with UNHCR, stretching Jordan's resources and exacerbating the protracted economic crisis in the Kingdom. Around 82 percent of registered Syrian refugees live in communities, with the rest living in two camps (Azraq and Za'atri) and two transit centres (Cyber City and King Abdullah Park). Refugees are not officially allowed to work and are	Results were drastic, with the number of households with poor food consumption rising steeply from 0 to 27% in a matter of weeks. Over 80 % of families were borrowing money to buy food, and 13% sent a family member to beg, compared with only four percent before. Such rapid deterioration in a short period of time shows how vital the continuation of WFP food assistance is for Syrian

[62] WFP VAM Iraq food security analysis, January 2016
[63] FAO Iraq Giews country Brief, January 2016
[64] FAO Iraq Giews country Brief, January 2016
[66] FAO Iraq Giews country Brief, January 2016
[67] WFP The Market Monitor, January 2016

		thus largely dependent on humanitarian assistance to meet their needs[68]	refugees.[69]
Madagascar	Quarterly changes in the Consumer Price Index (CPI) and the food CPI were low or negative in most countries but we have headline inflation accelerated in Madagascar (+7.4%).[70]	The 2015 rice crop is estimated at 6% below the previous year while maize and cassava are at 10% below the previous year. Above-normal rains are expected in the centre and north (with the risk of flooding) and normal to below-normal in the south, exacerbating the drought. El Niño has contributed to below-average rainfall in the south of the country - a region last year affected by drought conditions, which affected 200,000 people.[71]	The latest Crop and Food Security Assessment Mission (CFSAM) in Madagascar undertaken jointly by FAO and WFP, reports that 1.89 million people are food insecure of whom 400,000 are severely food insecure and need immediate assistance. The southern regions of Madagascar suffer from recurrent droughts and are the most affected by food insecurity. In the six most affected districts (Bekily, Beloha, Tsihombe, Ambovombe, Ampanihy and Amboasary), 77% of the population, roughly 971,000 people, are food insecure.[72]
Myanmar	In Myanmar, the price for low quality rice decreased in Q4-2014 (-4%) thanks to a good harvest season; however, prices were at alert level in Magway, Maungdaw and Yenanchaung markets according to the ALPS. The low quality rice price for	The conflict continues to undermine food security and disrupt agricultural activities. Around 240 000 people have been displaced for several years due to inter-communal violence in Rakhine, Kachin and northern Shan states. Major floods and landslides in rural Myanmar between July and October 2015	An estimated 841,000 IDPs and other conflict and natural disaster affected people in Myanmar continue to be food insecure and/or are in need of livelihoods support. Vulnerable people in Myanmar who continue to be food

[68] WFP Jordan situation report, November 2015
[69] WFP Jordan country brief, December 2015
[70] WFP the Market Monitor, October 2015
[71] FAO 2015- 2016 EL Niño early action and response for agriculture, food security and nutrition, February 2016
[72] WFP VAM global good security update, December 2015

	December is 20% higher compared the same month last year and 18% from the same quarterly last year [73]	had a devastating impact on agriculture, increasing the vulnerability of already food insecure people. Significant losses of crops, seeds, livestock, tools and fertilizer were reported. Floods killed more than 96.600 heads of livestock and damaged or destroyed 70% of crops in Sagging – the worst affected region casual agricultural labor also dried up in many areas, leaving landless workers cut off from income. Although most of the 1.7 million people temporarily displaced by the disaster have returned home, they will face a higher risk of food insecurity and malnutrition into 2016.[74]	insecure and/or in need of livelihoods support are the following: 129,837 conflict-affected people in Kachin and northern Shan states, 252,000 people in Rakhine who remain affected by the ongoing inter-communal tensions and restrictions on their movements and an estimated 459,386 people in need of humanitarian support after floods.[75]
Somalia	In Somalia, sorghum prices increased seasonally (+4%) in Q4-2015 but remained well below last year's levels in all regions (-20%). Compared to the same month last year, sorghum and rice imported prices drop 23% and 29% respectively. [76]In areas that flood, staple food prices will likely sharply increase after floods, but as feeder roads reopen and markets are resupplied, they will fall more in line with surrounding areas. In the Northwest, local cereal prices will remain stable near their current highs	El Niño conditions led to drought in Somaliland now also made official in Puntland with the problem of access to water for human and animal and significant displacements of populations to areas of pasture or the pressure is increasing and heavy rains in other parts of the country. In the southern and central parts of the country, rivers overflowed in December, forcing people to leave their homes. [78] Insecurity, conflict and high food prices continue to contribute to poor household food security and high malnutrition rates. Clashes between the government supported by the African Union Mission in Somalia (AMISOM) and Al	1 million severely food insecure through December 2015, 4.9 million people will remain in need of humanitarian assistance over 1 million of whom are facing severe levels of food insecurity. Protracted conflict, new and continued displacement and recurring natural disasters have heavily impacted harvests and markets in Somalia. 62% of the people in crisis and emergency phases of food insecurity are internally displaced.[81]

[73] WFP The Market Monitor, January 2016
[74]FAO-FAO in the 2016 humanitarian appeals Saving livelihoods saves lives, January 2016
[75] OCHA Myanmar Humanitarian Needs Overview , November 2015
[76] WFP the market monitor, January 2016
[78] WFP El Niño 2015-2016 Preparedness and Response Situation Report #2, 28 January 2016

	until Karan harvest in November. With expected below-average production in this region, they will decline less than usual after that.In areas with trade restrictions due to conflict in the Shabelles, the Jubas, Bakool, and Hiiraan, both locally-produced and imported commodities will be less available. Prices are likely to remain higher while trade restrictions remain in place. Heavy Deyr rains are likely to further reduce trade and push prices up in these areas, as traders are unable to stock in anticipation of the rains in many of these areas.[77]	Shabaab are likely to continue to impede trade and population movements, agriculture, and access to markets for livestock, crops, and labor.[79] About 1.1 million people are internally displaced and highly vulnerable to natural hazards, disease outbreaks and protection risks. Decrease prices of livestock which is the main source of income of population and therefore a term deleterious exchange for virtually all Somali Rural.[80]	
Ukraine	In Ukraine seasonally adjusted prices for potatoes went up by 30%, but down by 10% for bread and oil. All prices increase from last year at the same year, 57% for bread, 61% for oil and 90% and 34% respectively for potatoes and milk. Q/Q prices decreased for gasoline (-4.2%) and diesel (-7.1%) but were still high compared with Q4-2014 (+17% gasoline	Ukraine recent political and economic constraints continue to threaten food security in affected areas. The Ukrainian economy is currently undergoing a crisis with the decline of GDP growth rates, decrease of foreign investments, increase of government debt, and the significant devaluation of its national currency (estimated as much as 50%). Consumer prices are growing at a faster pace than household income, limiting families'	The ongoing conflict has affected tens of thousands of people who are in desperate need of help. It is estimated that more than 1.5 million people have been displaced in Ukraine since the beginning of the crisis in 2014. WFP would extend emergency operation in eastern Ukraine to provide more than 260,000 conflict-

[81] FAO-FAO in the 2016 humanitarian appeals Saving livelihoods saves lives, Janauray2016
[77] FEWSNET Food Security Update, January 2016
[79] FEWSNET Food Security Update, JANUARAY 2016
[80] OCHA, Global Humanitarian overview, January 2016

	and +4.3% diesel) due to the increase in the levy for fuels.[82]	purchasing power and general access to food.[83]	affected people in the region with food assistance until the end of June 2016. Food security is expected to worsen during the cold winter months from January to April, making this time especially critical.[84]
Bangladesh	After a generally stable period in 2014, the year-on-year inflation rate rose gradually on December of 2015, driven partly by increasing food prices with 6,4% for rice and 7,9% for pulse. However flour price decrease 19% from the high level of the previous year.[85]	During the flooding, crop land and homesteads deluged with water and caused severe damage to standing crops. The three floods have damaged standing crops. An early flood occurred in May and damaged jute, groundnut, sesame, sesbania and vegetables. Supply of vegetables has decreased due to destruction of production. Large areas of Amon crops have been damaged which has had strong impact on job opportunities for the daily labor. The majority of the people in Gaibandha and Kurigram are involved in crop agriculture. The flood caused severe damage to standing crops and vegetables. Small and marginal farmers and agricultural daily laborers have lost their income and employment.[86]	Up to 500 000 Rohingya refugees from Myanmar are stateless and face discrimination, persecution and exploitations. Food insecurity and undernutrition are further aggravated by limited access to water, sanitation and basic health services. Natural disasters like flood, landslides further increase their vulnerability. The Northwest of Bangladesh is prone to regular flooding and considered as the poorest and most food insecure region of Bangladesh; 370.000 people are affected by chronic food insecurity.[87]
Burkina Faso	Seasonally adjusted prices decreased in Burkina Faso (-1% sorghum and -1% millet), Inflationary pressure on food	In the northern area livestock transhumance and millet (livelihood zone 8) in the extreme north, the animals continue to receive adequate feeding and	The government and humanitarian interventions in areas previously Stress food insecurity (IPC Phase 2

[82] WFP The market Monitor, January 2016
[83] WFP Ukraine Country Brief October-December 2015
[84] WFP Extends food assistance in Eastern Ukraine until June 2016, January 2016.
[85] ACF Bangladesh data food price, January 2016
[86] Food security Cluster Bangladesh- Secondary data analysis- monsoon flooding 2015
[87] Emergency Response Coordination Centre (ERCC)- ECHO Bangladesh- Humanitarian crisis, November 2015

	prices eased in Burkina Faso (-3.7%). Compared to the last year at the same month sorghum and millet prices decrease -2% while maize prices increase + 15%.[88]	watering conditions and their fitness ensures their prices profitable sale. In small ruminants in particular an average price range is observed in December to 14 % above the five-year average, according to the market. The main income generating activities such as gold panning and market gardening are normally conducted in an environment characterized by good water availability and a general level of prices similar to the average of the past five years. The income from these activities will be available as usual until the beginning of the rainy season in May-June and promote household access to food.[89]	communes of the province of Oudalan and surrounding). Improving consumer with crops, farm labor opportunities, and expected normal prices will lead to results of acute food insecurity Low (Phase 1 of the IPC) between October 2015 and March 2016 across the country.[90]
Djibouti	Most staple food prices remained stable over the past six months. However, bean prices in Djibouti city were 300 Djiboutian Franc (DJF) in early December, up from 240 DJF in July. Bean prices are expected to remain above average through at least March 2016.[91]	Recurrent drought conditions induced by climate change over the past two decades have led to a significant deterioration in Djibouti's humanitarian situation. The climate is already one of the harshest in the world. Heat and arid conditions have left only 0.01 per cent of the land arable with minimal annual rainfall.[92]	More than 58% of the rural population is food insecure and about 23% live in extreme poverty. [93] As a result, poor households have limited access to milk and livestock products. An estimated 110,000 people in southeastern pastoral, northwestern pastoral, and Obock pastoral areas are currently in Crisis (IPC Phase 3) and

88 WFP the market monitor, January 2016
89 FEWSNET les prix des denrées alimentaires restent normaux après les récoltes moyennes, January 2016
90 FEWSNET des récoltes moyennes en 2015 vont conduire à l'insécurité alimentaire aigue minimale, October 2015
91 FEWSNET Crisis (IPC phase3) persists in Southeastern, and northwestern, and Obock pastoral areas, December 2015
92 OCHA Global Humanitarian overview, January 2016
93 OCHA Global Humanitarian overview, January 2016

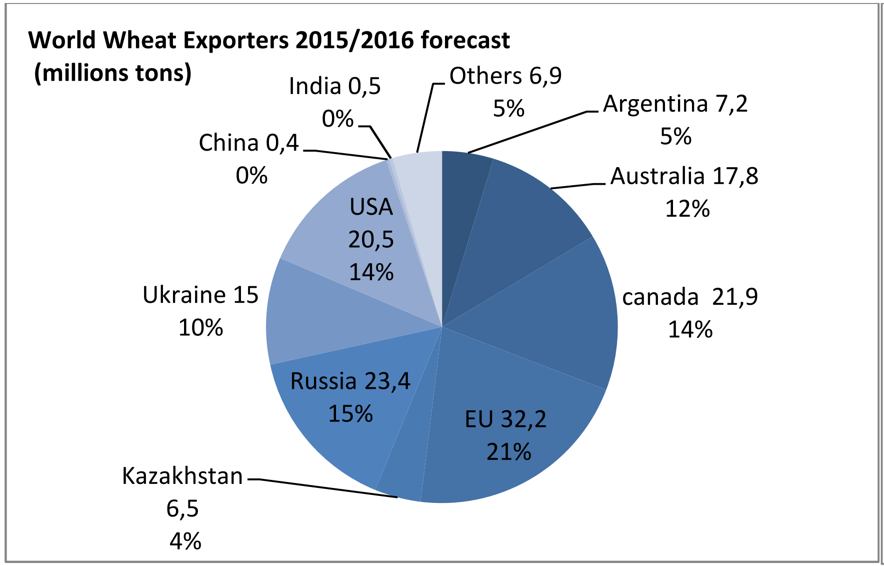
			are expected to remain in Crisis (IPC Phase 3) through March 2016.[94]
Guinea	Markets continued to rebound in Ebola-affected countries and seasonally adjusted prices decreased in Guinea -5% rice and -9% palm oil headline inflation also edged up in Guinea (+7.4%). The imported rice and palm oil prices are not changed between last year and this year at the same period.[95]	The increase in rice production for the 2015/2016 campaign, estimated at 11.75% by the National Agency for Food and Agricultural Statistics indicates that households have more inventory currently available (January to March 2016) compared to a normal year not only for food but also to increase their income. The availability of agricultural products and well-stocked markets will keep prices at a relatively stable level until the beginning of the lean season in late May, and therefore accessible to poor households.[96] The Ebola Virus Disease (EVD), which significantly affected farming activities in 2014, has been largely controlled. As a result, the aggregate cereal production in 2015, estimated at about 3.5 million tons, is 7% above the previous year's output and 11 percent above-average. Of this total, paddy rice production is estimated at 2.047 million tons, a 4% increase from the year before and accounts for the bulk of the cereal production.[97]	The return of the hand of agricultural opens after Ebola and the resumption of post-Ebola activities in the field of agriculture, livestock, and fisheries and the revival of trade on the domestic and export markets (palm oil, groundnuts, cocoa, etc.) increase the food supply and enable producers and traders, especially in areas affected by Ebola to improve their income, which contributes to the minimum requirements (Phase 1 CPI) food insecurity in the country until at least March 2016.[98] Although the Ebola outbreak has ended, according to the latest "Cadre Harmonisé" analysis, about 40 500 people, located mostly in Nzerekore and Kindia, are currently estimated to be in Phase 3: "Crisis" and above and are in need of urgent assistance.[99]
Liberia	Markets continued to rebound and prices decreased in in Liberia (-5% rice, -6% cassava and -8% palm oil) thanks to growing production and imports.	2015/16 rice production levels in Liberia were average to above average, with recent official government reports suggesting that Lofa County, a surplus rice-producing zone where 2014 farming	Labor opportunity from off-season cropping and the recovery of many seasonal livelihood activities will provide most households with

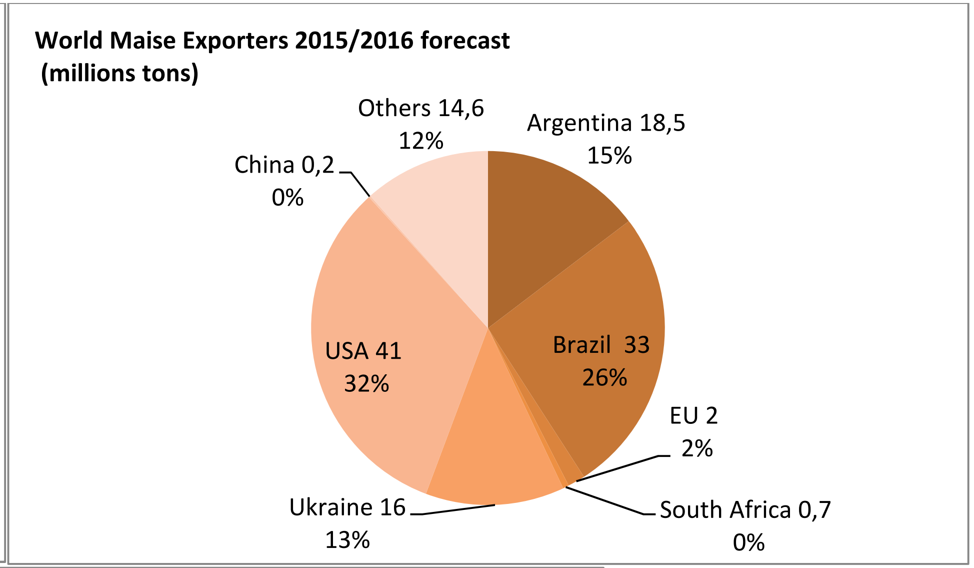
[94] FEWSNET Crisis (IPC phase3) persists in Southeastern, and northwestern, and Obock pastoral areas, December 2015
[95] WFP the market monitor, January 2016
[96] FEWSNET la reprise des activités économiques post-Ebola favorise des bonnes conditions alimentaires, January 2016
[97] FAO Guinea Giews Country brief , January 2016
[98] FEWSNET la reprise des activités économiques post-Ebola favorise des bonnes conditions alimentaires, January 2016
[99] FAO Guinea Giews Country brief , January 2016

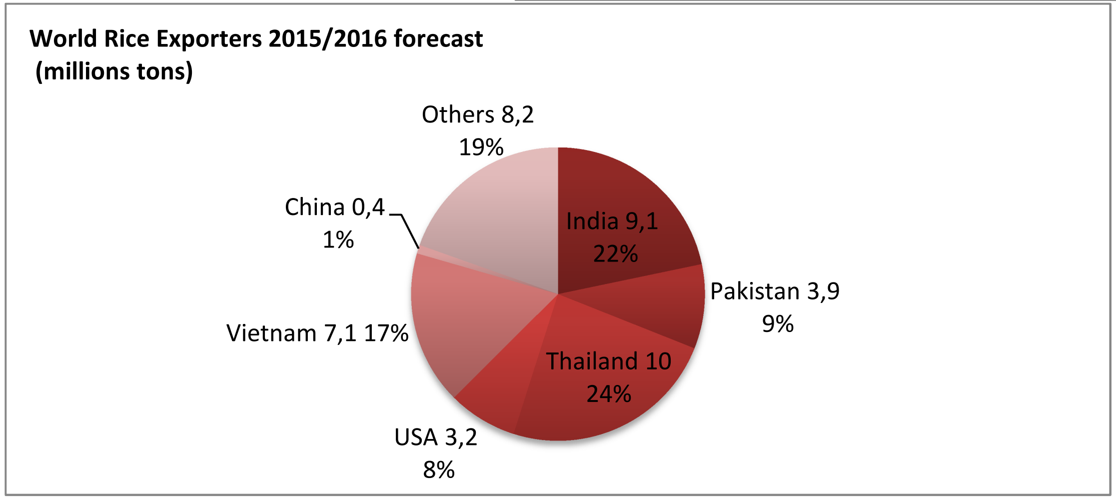
	Compared to the last year at the same month, imported rice, fresh cassava and palm oil decreased respectively -10%, -19% and -7%. [100]	activities were hindered by the Ebola outbreak, experienced a bumper harvest this year. Due to favorable harvests, rice stocks are expected to last longer than they did last year, improving food availability at the household level. With the ongoing harvests and regular rice imports from the international market, food availability at this time is sufficient to meet local demand. [101] Government intervention and its partners in supplying improved seeds, fertilizer and purchasing paddy rice from farmers, preliminary estimates put the 2015 aggregate cereal production at about 295000 tons, 11% above the previous year's output and 6 percent above-average. Cassava production is estimated to have increased by 9 %.[102]	sufficient incomes to meet their essential food and non-food needs and remain in Minimal (IPC Phase 1) food insecurity through at least March 2016. Small populations, making up less than 20% of the total population in all counties, will face Stressed (IPC Phase 2) outcomes through at least March.[103]
Sierra Leone	Market prices for rice, cassava, and sweet potato are stable and normal market activities have resumed because of the lift in the ban on weekly markets.[104]	As food and cash crops continue to be harvested in Kailahun, most farmers have already sold their cocoa and coffee harvests for cash. Household access to income from the sale of rice and cassava is also starting to decrease. However, demand for agricultural labor is at normal levels and expected to increase during the planting period between April and May.[105]	Household food consumption is expected to remain adequate between January and the start of the lean season in May. [106]

[100] WFP The market monitor, January 2016
[101] FEWSNET improving food availability with the recent average to above-average harvests, January 2016
[102] FAO Liberia Giews country brief, January 2016
[103] FEWSNET improving food availability with the recent average to above-average harvests, January 2016
[104] FEWSNET household food consumption is expected to remain adequate through the start on the lean season, January 2016
[105] FEWSNET household food consumption is expected to remain adequate through the start on the lean season, January 2016
[106] FEWSNET household food consumption is expected to remain adequate through the start on the lean season, January 2016

International Exchange







Source for Exports Data: International Grains Council, Grain Market Report, data from February 2016 http://www.igc.int/downloads/gmrsummary/gmrsumme.pdf

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