



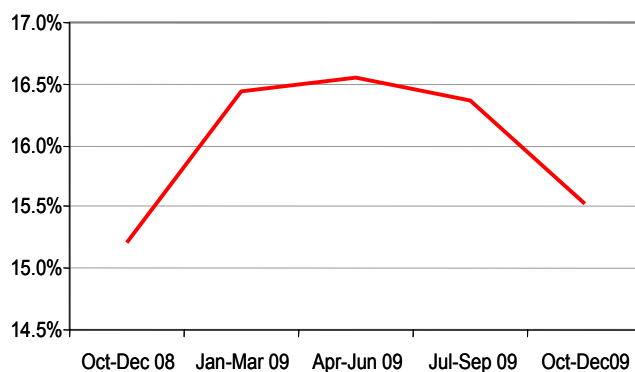
Nepal Food Security Bulletin

Issue 26, October - December 2009

Situation Summary

- The recent completion of the major harvest period of the year has improved the overall short-term food security situation across the country. At a national level WFP household surveys revealed that food stocks and consumption levels have seen an improvement since late last year when the harvest began.
- However, a number of districts in the Karnali and Far Western Hills are suffering high or severe levels of food insecurity due to successive periods of drought, poor recent harvest, insufficient supply of food in local markets and overall lack of economic opportunity. Over 50 percent of households surveyed reported crop losses at 30-70 percent.
- WFP Food for Work programming, which targeted 1.6 million people in 2008/09, has significantly reduced the portion of the total population which are highly and severely food insecure. However, 145 VDCs across 12 districts of Nepal (mostly in the Mid- and Far-Western Regions but including 2 in the East in Sankhuwasabha) have been identified by the NeKSAP District Food Security Networks as being highly or severely food insecure. In these areas the estimated population which are unable to sustain their basic food consumption needs is 395,500.
- The major district of concern is Bajura where all three summer crops: paddy, maize, and millet almost completely failed across most of the district. Household food stocks were largely depleted prior to the harvest period and have not been replenished. Due to the severity of food insecurity, households in the worst affected areas have reported consuming their seed stocks, so there is additional concern regarding the prospects of the next crop. Market supply is also a key problem with some local markets having very limited or no food stocks. Other districts with multiple VDCs experiencing high food insecurity include: Humla, Mugu, Jumla, Kalikot, Dailekh, Achham, Doti, Baitadi, and Darchula.
- National food price inflation remains of significant concern to food security in Nepal and needs to be closely monitored by both the government and the international community. While international food prices have reduced significantly over the past year (since the peak of the food crisis in 2008), prices in Nepal have continued to increase. Compared to 12 months ago the price of black-gram is up by 44 percent, wheat flour by 25 percent, musuro (broken lentil) by 25 percent and coarse rice by 14 percent. Furthermore, there is a strong likelihood that food prices will continue to increase in the first half of 2010. This will be the likely result of: poor national production in 2009, expected further increases in international prices due to a poor global harvest in 2009 (including a generally weak harvest across Asia); and the potential of fuel and transportation prices increasing (the major driver of food costs in remote areas of Nepal).

Figure 1. Percentage of population food insecure



Harvesting of the Summer crop and initiation of new WFP Food/Cash for Work programming have reduced the number of food insecure

Hunger Overview

Food Security Cluster	Current	Change	3 month	6 month
1. Karnali	Highly food insecure	→	→	↓
2. Far-Western Hill and Mountain	Highly food insecure	→	→	↓
3. Rapti-Bheri Hills	Moderately food insecure	↑	→	↓
4. Western Terai	Food secure	→	→	→
5. Central & Eastern Terai	Food secure	→	→	→
6. Western Hill and Mountain	Food secure	→	→	→
7. Central Hill and Mountain	Food secure	↑	→	↓
8. Eastern Hill and Mountain	Moderately food insecure	↑	→	↓
Food insecure population	3.5	↑	→	↓

Classification key See page 3 for more detailed classification explanation

- Food secure
- Moderately food insecure
- Highly food insecure
- Severely food insecure
- Humanitarian emergency/ famine

Harvesting of the summer crop, initiation of new WFP Food/Cash for Work programming and re-opening of roads after the monsoon have improved food security across most of Nepal in the short term.

However, due to poor summer crop production it is expected that the food security situation of many households in the most food insecure regions will remain critical in the first quarter of 2010 and diminish further in the longer term.

The current food security situation is of high concern in two Food Security Cluster regions: the Karnali and the Far Western hill and Mountains



नेपाल खाद्य सुरक्षा अनुगमन प्रणाली
Nepal Khadya Surakhya Anugaman Pranali (NeKSAP)
Nepal Food Security Monitoring System

For the latest information relating to Food Security in Nepal check out the NeKSAP Google Group:
<http://groups.google.com/group/NeKSAP?hl=en>

Join the group and receive regular up to date information products.



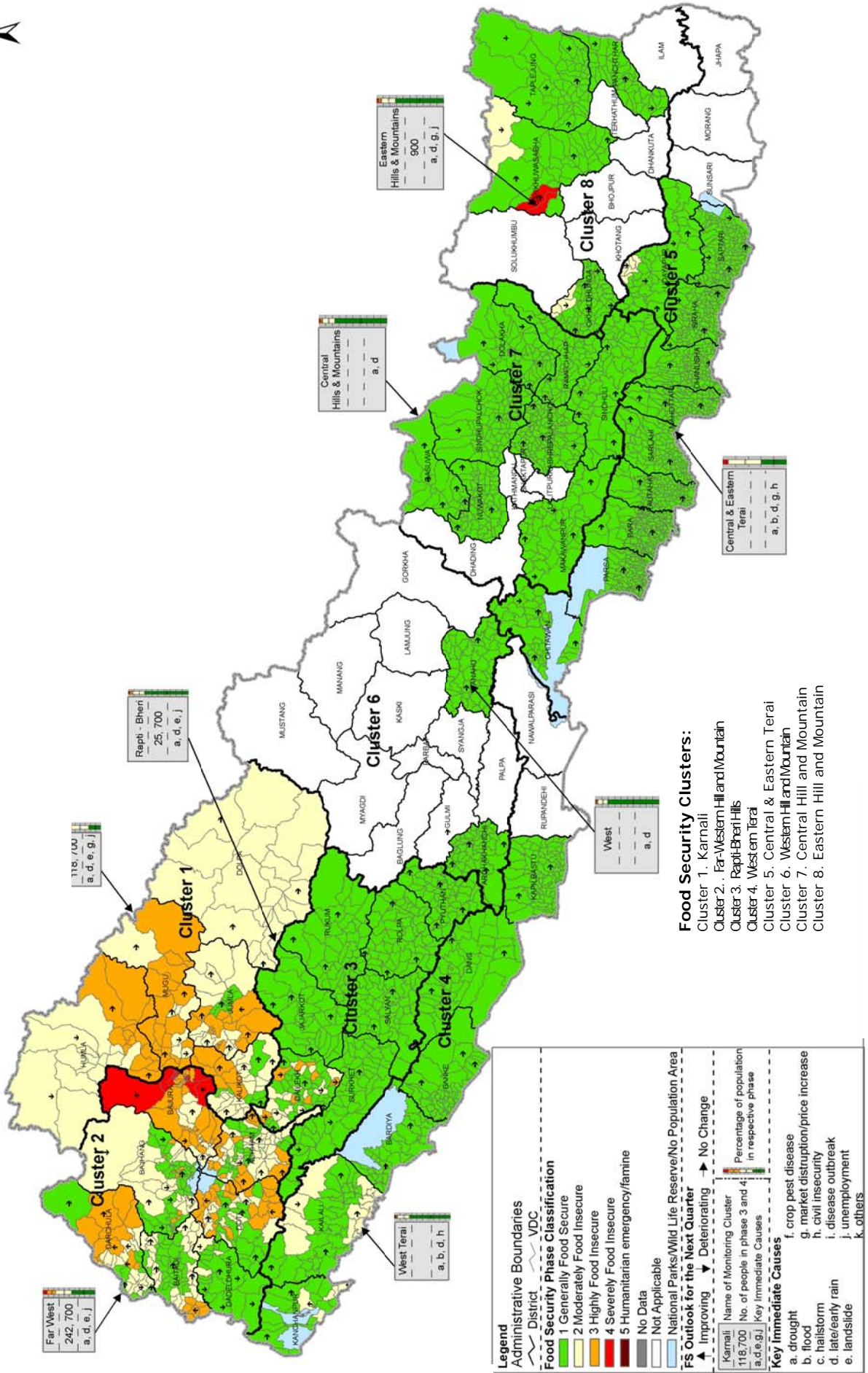
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Food Security Country Map

Nepal Food Security Map

December, 2009

Map 1.



An A3 size Food Security Country Map is available for download from the NeKSAP

Google group: http://www.neksap.googlegroups.com/web/FSPMAP2009_3.pdf?



Highly and severely food insecure populations

Across Nepal the population of moderately, highly and severely food insecure is estimated by WFP to be 3.5 million. This number has been greatly reduced due to the recent harvest and WFP's food for work and cash for work programming which has extensively targeted the most food insecure districts in Nepal. The table below provides estimated figures of concentrated populations experiencing high or severe levels of food insecurity in the most food insecure districts across Nepal. At this level of food insecurity consumption has drastically reduced and the household is undertaking severe and unsustainable coping mechanisms such as skipping meals, selling assets, and removing children from school.

District/VDCs affected	Highly Food Insecure	Severely Food Insecure	% of total district population
	Phase 3	Phase 4	
Cluster 1. Karnali			
Jumla: Badki (1, 6-8), Narakat (5-9), GhodeMahadev, Malikathanta, Tamti, BumraMadichaur, Malikabota, Shanigaun, Haku, Lamra, Talium, Tatopani	37,100	0	35.30%
Humla: Barain, Saya, Gothi, Rodikot, Melchham, ShreeMashta, Darma, Mimi, Jaira, Shreenagar, Madana, Kalika, and Maila	21,400	0	45.39%
Mugu: Dhainakot, Kotdanda, Bhie, Natharpu, Photu, Jima, Ruga, Hyanglu, Kimri, Pulu, Dolphu, Sukadhik, Khamale, Mangri, Rara, Kalai, and Rowa	31,800	0	56.94%
Kalikot: Dhoulagoha, Khina, Thirpu, Ramnakot, Nanikot, and Badalkot	28,400	0	23.24%
Cluster 2. Far-Western Hills and Mountains			
Bajhang: Bhatekhola (1), Rilju (1), Luyanta (2,8), Subeda (3,9), Deulek (4, 7), Syandi (3,6,9), Sunkuda (3, 5), Banjh (8), Parakatne (7), Dangaji (1, 6), and Majhigaun (3)	7,600	0	3.94%
Bajura: Bichhiya, Bandhu (1-5), Gotri, Sappata, Rugin, Jagannath, Kuldevmandu (1), Wai (4-9), Wai (1-3), Kuldevmandu (8), Budhiganga, Bandhu (6-9), Jukot, Manakot, Chhatara, Toli (4,5,8,9), Jayabageshwari, Kotila, Antichaur, Dahakot, Brahmatala (1,3,5,7), Gudukhati, Jugada (4-7), Kolti, and Kailashmandu	72,200	30,600	83.30%
Darchula: Rapla, Ghunsha, Khandeshwori, Sunsera, Sitola, Guljar, Dhaulakot, PipalChauri, Eyarikot, Dhulgada, and RaniShikhar	17,500	0	12.43%
Baitadi: Amchaur (1-8), Shivanath (1-8), Udayadev (1-4, 7,8), Pancheshwor, Kulau (1-5, 7-9), Mahakali (1-6), and Sarmali (1, 4-6, 8,9)	15,500	0	5.86%
Doti: Chappali, Girichauka, Toleni, Warpata, Lanakedareshwor, Kanachaur, Dhanglagaun/Ghangel, Simchour, Gaguda, Pokhari, Gairagaun, Kedarakhada, Wagalek, Khatiwada, Daud, Kalikasthan, Tijali, Ganjari, Mannakapadi, Dhirkamandau, Kalena, and Ladagada	60,800	0	24.95%
Achham: Kalekanda, Barala, Chafamandu, Khaaptad, Patalkot, Devasthan, Kuskot, Thanti, Rishidaha, Sutar, Dhungachaina, Payal, Seudi, Balata, Warala	46,000	0	17.60%
Cluster 3. Rapti-Bheri Hills			
Dailekh: Badalamji, Salleri, Baluwatar (6-9), ChhiudiPusakot, Rum (3, 6-9), Piladi, Badabhairab, and Singhasain	25,700	0	9.86%
Cluster 8. Eastern Hills and Mountains			
Sankhuwasabha: Tamku (9), and Bala (8)	0	900	0.52%
TOTAL THIS QUARTER	364,000	31,500	N/A
TOTAL LAST QUARTER	576,500	30,600	N/A
DIFFERENCE	-37%	+3%	N/A

Food security classification:

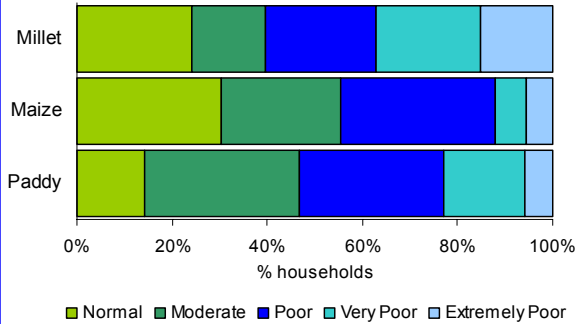
- Phase 1. Food Secure – household has secure access to food.
- Phase 2. Moderately Food Insecure – household members have reduced their consumption, calorie and nutrient intake of household members is borderline sufficient. In addition, the household is undertaking coping mechanisms such as borrowing money and selling non productive assets.
- Phase 3. Highly Food Insecure – household members have significantly reduced their consumption, calorie and nutrient intake is highly deficient. In addition the household is undertaking irreversible coping mechanisms such as selling productive assets and taking children out of school.
- Phase 4. Severely Food Insecure – household members have significantly reduced their consumption, calorie and nutrient intake is highly deficient. The household has limited coping mechanisms left and is likely to be selling final assets/ land.
- Phase 5. Humanitarian Emergency - there is no opportunity for the household to gain access to food, leading to starvation if no intervention is made.

* A detailed description of methodology used by WFP to calculate food insecure is provided on the NeKSAP google group: http://neksap.googlegroups.com/web/Population_Tracking.pdf?hl=en&hl=en

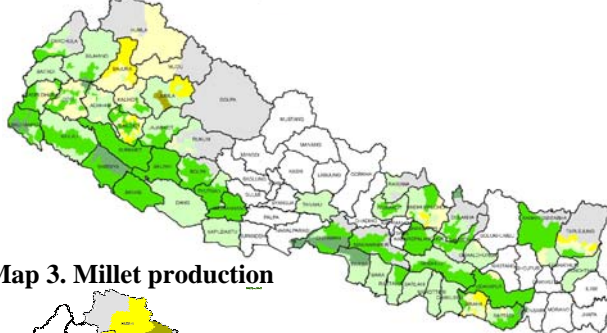


Crop production

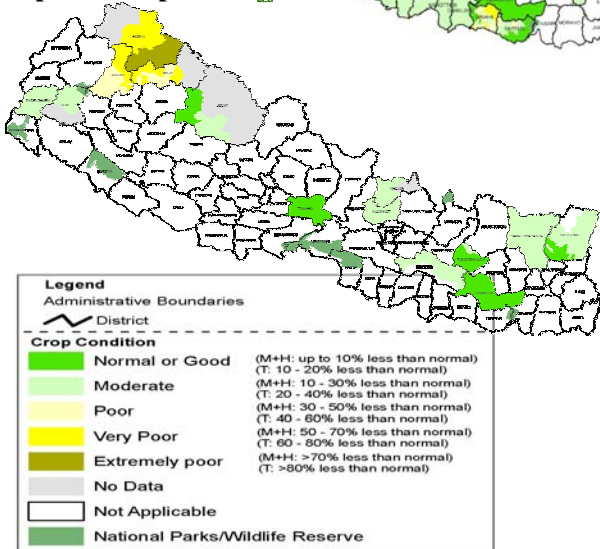
Figure 2. Household perception of crop production outlook (Oct-Dec 2009)



Map 2. Paddy production



Map 3. Millet production



Domestic situation

- The Ministry of Agriculture and Cooperatives has estimated that this year's national paddy and maize harvests have decreased by 11 and 4 percent respectively compared to last year. Last year was a record summer crop with national production of paddy at 4.5 million mt. However, due to a winter drought the total annual cereal balance was 132,916 mt deficit in 2008/2009. Preliminary MoAC estimates earlier in the year had the 2009/2010 deficit at around 400,000 mt, however this figure will likely be revised up following the poor summer harvest. The estimated paddy harvest for 2009 is only 4.02 million mt; a figure which is similar to production levels nine years ago. This harvest is highly important to overall food security as paddy makes up more than 50 percent of the national cereal production.
- At a local level, summer crop losses in some areas were severe. Household surveying undertaken by WFP revealed that high crop losses (of 30-70 percent) were experienced or expected by 53 percent of households in relation to their paddy harvest, 45 percent in relation to Maize and 60 percent in relation to millet. Almost 80 percent of these households reported that late/inadequate rainfall was the main reason for crop losses.
- Crop losses were most highly concentrated in the Mid and Far-Western districts and in some of the Eastern districts. For example, 8 VDCs in the east and north of Bajura reported average paddy and maize losses of between 50-70 percent as did VDCs in the eastern and central belts of Jumla, in northern and southern parts of Dailekh.
- Many VDCs across Mugu, Humla, Kalikot, Dailekh, Achham, Doti, Dadeldhura, Rukum, Sindhupalchowk, Okhaldhunga, Udayapur, Saptari, Sankhuwasabha, and Taplejung reported losses in paddy of 30-50 percent. Millet, an important crop to support food security in Humla, Mugu, and Bajura, has largely failed (declined by 50-70%, or more).
- A winter crop outlook is provided on the back page of this report. A joint MoAC / WFP crop and food security verification bulletin is forthcoming.

Regional/ international situation

- Natural disasters, including drought, flooding and typhoon caused substantial regional summer crop losses during 2009. Preliminary reports estimate India will suffer an 11 percent drop in paddy production this year compared to last. Other estimated paddy losses in the region include: Vietnam at 100,000 tons, Pakistan 300,000 tons and the Philippines 500,000 tons. Rice stockpiles of the world's five largest rice exporters - Thailand, Vietnam, the U.S., Pakistan and India - are forecast to plunge to the lowest level in five years.

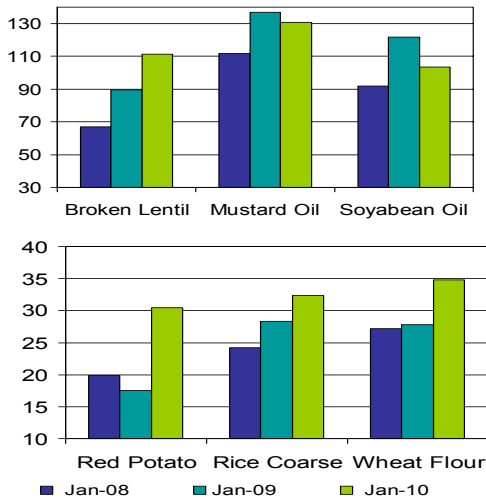
Migration trends

- This is the common period for seasonal out-migration. Due to severe summer drought and resulting crop losses some of the districts in the Mid and Far-West reported increased levels of out migration compared to last year. For instance, between October and December out-migration from Bajura reportedly increased by 20 percent compared to last year, and from Dailekh it increased by 30 percent. In the districts of: Achham, Doti, Baitadi, and Darchula it has increased by more than 10 percent.
- Overall, Nepal is experiencing a reduction in the growth of remittances (due largely to the global economic crisis). However, it appears that demand for lowly skilled Nepalese migrants in India (this represents the bulk of highly food insecure migrants) has not significantly declined; this needs to be monitored closely.



Markets

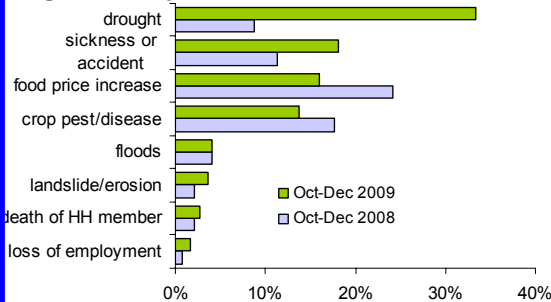
Figure 3. Staple food prices, January 2010



- National food price inflation is of significant concern to food security in Nepal. Compared to 12 months ago the price of black-gram is up by 44 percent, wheat flour by 25 percent, musuro (broken lentil) by 25 percent and coarse rice by 14 percent. Common cooking oils are the only commodity which have not significantly increased during the past 12 months, however these are still very high compared to 2007 prices.
- During the monitoring period 90 percent of markets surveyed reported that supply had remained good or improved following the end of monsoon. This was the result of both improved road access and also the ongoing summer harvest which re-stocked markets with paddy, maize and millet .
- However, a number of hill and mountain markets reported ongoing supply constraints, including Bajura, Dailekh, Dolpa, Mugu, and Hulma. The Kolti region of Bajura is facing a particularly severe food supply situation and NFC supply is virtually the only grain stock available in local markets. This situation is largely due to the monsoon which caused severe damage to transportation routes and blocked food transportation for much of the period.
- Bandhs caused disruption to almost every market surveyed by WFP during the period. In December, almost 70 percent of the 30 markets surveyed were forced to close at least once during the month.

Household food security

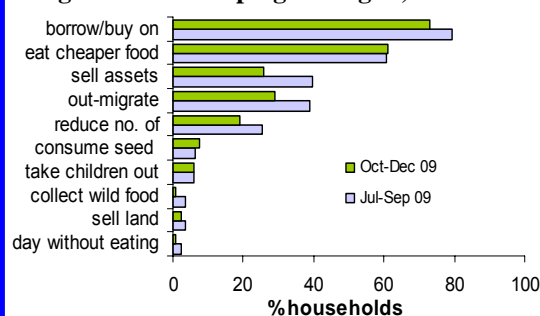
Figure 4. Major Shocks, Oct-Dec 2008 and 2009



Household food shocks

- Overall, more than 80 percent of surveyed households faced one form of shock or another. The main shock this cycle was drought as reported by 33 percent of households. This was quite high compared to the same period in 2008 when only 9 percent reported drought as a major shock. Drought contributed towards food shortages in 26 percent of surveyed households.

Figure 5. Main coping strategies, Oct-Dec 2009



Household coping

- The coping strategies adopted by households show improvement compared to the previous cycle. However, 40 percent of households surveyed were still having to spend their savings on food and 6 percent of households surveyed had taken children out from school to work.
- Thirty-eight percent of households surveyed, had a borderline food consumption pattern — typified by negligible consumption of meat, only three meals of pulses per week, and no vegetables over a seven day period.

Health and Nutrition

- This cycle there was no significant change observed in the MUAC (Mid-Upper Arm Circumference) of 6-59 month year old children compared to July-September 2009. Nutritional status has remained relatively stable due to the recent summer harvest and large scale WFP Food for Work operations in the most highly/ severely food insecure districts (including the provision of fortified food rations to pregnant/lactating women and young children).
- A higher rate of children under 12.5cm MUAC was observed from households that suffered a severe summer crop loss.
- As the pre-harvest hunger season approaches, it is anticipated that the nutrition situation could deteriorate in coming months and this should be closely monitored.



Food security outlook

- Due to the recent harvest of the summer crop the short term food security situation has generally improved. However, the harvest was generally poor across much of the country and as a result food insecurity is expected to remain critical in certain parts of the country and deteriorate in the long term. The situation is particularly worrisome for the 395,500 people who are already at risk and require urgent support. These households typically have very low food stocks (on average between 2 weeks—1 month).
- Bajura is the district of most immediate concern— much of the district is listed as either highly or severely food insecure. Across the district all three summer crops: paddy, maize, and millet largely failed. In addition, there is very little food available for purchase in local markets and NFC assistance is not significant. WFP food for work programming has provided significant relief across much of the district, and has been instrumental in preventing the situation from further deterioration. However, the situation remains of high concern and is likely to deteriorate over the next 3 months as the food assistance provided will largely be depleted from February onwards.
- Other districts with substantial rates of highly food insecure, include: Humla, Mugu, Jumla, Kalikot, Dailekh, Achham, Doti, Baitadi, and Darchula. In these districts, household food stock is typically sufficient for only 2 weeks-2 months, employment opportunities are limited, and market prices have gone up by around 20 percent during the past 3 months (due to limited supply). Therefore, the food security outlook in these districts is also expected to diminish during the coming three months.

Winter Crop Outlook

- The recent joint MoAC and WFP crop assessment (report forthcoming) indicated that the winter crop cultivation, wheat and barley, appears to be generally good. This is because of the long monsoon (which extended an additional 20 days) that resulted in good moisture content in the soil for seed germination. However, the situation in Humla, Mugu, Rolpa, eastern Bajura, Rautahat, Siraha and Saptari should be monitored closely as these areas did not experience good monsoon precipitation and have also received very little/ no rain during the critical months of November – December; the outlook is currently for a crop loss of 10-30 percent. Limited use of irrigation and fertilizers is exacerbating the problem for households in most of these districts. The crop situation in all districts will largely depend on weather conditions between now and the end of March.

Food Price Outlook

- Food prices remain of serious concern. While international food prices have reduced significantly over the past year (since the peak of the food crisis in 2008) prices in Nepal have not fallen significantly. At this time of year there should be a substantial decrease in the price of key summer crop grains such as paddy and maize, however poor local and regional production has kept prices high. Moreover, international prices have now started to increase because of a generally poor global harvest in 2009 (including a generally weak harvest across Asia). Poor national production in 2009, increasing international food prices and

the potential of fuel and transportation price increases are likely to drive prices higher during the first half of 2010.

Detailed district food security information

The Nepal Food Security Monitoring System (NeKSAP) currently monitors 54 districts across Nepal. This information forms the basis for this bulletin. Detailed food security bulletins are available in English and Nepalese for all districts noted by an asterisk, these are available for download from the NeKSAP google group <http://groups.google.com/group/NeKSAP/web/food-security-bulletin-2?hl=en>. Reports for some of the most food insecure districts (where over 40% of the district is highly or severely food insecure) are provided as an appendix to this report.

Cluster 1.Karnali

Dolpa*
Humla*
Jumla*
Kalikot*
Mugu*

Cluster 2.Western Hill & Mountain

Achham*
Bajhang*
Bajura*
Baitadi*
Dadeldhura*
Darchula*
Doti*

Cluster 3. Rapti-Bheri Hills

Dailekh*
Jajarkot*
Pyuthan*
Rolpa*
Rukum*
Salyan*
Surkhet*

Cluster 4. Western Terai

Banke*
Bardiya*
Dang*
Kailali*
Kanchanpur*
Kapilbastu*

Cluster 5. Eastern Terai

Bara*
Chitwan*
Dhanusa*
Mahottari*
Parsa*
Rautahat*
Saptari*
Sarlahi*
Siraha*
Udayapur*

6. Western Hill and Mountain

Gorkha
Lamjung
Tanahu*
Arghakhanchi*
Parbat
Baglung
Myagdi

7. Central Hill and Mountain

Sindhuli*
Ramechhap*
Dolakha*
Sindhupalchok*
Kabrepalanchok*
Nuwakot*
Rusuwa*
Makawanpur*

8. Eastern Hill and Mountain

Taplejung*
Panchthar*
Sankhuwasabha*
Okhaldunga*

This Food Security Bulletin is based on (i) data collected from 944 households (Hill: 381 households, Mountain: 390 households, Terai: 173 households) during October-December 2009 as a part of the Nepal Food Security Monitoring System (NeKSAP), (ii) District Food Security Network Meetings across 54 districts of Nepal held by NeKSAP, and (iii) other information sources as referenced.



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