



**Food and Agriculture
Organization of the
United Nations**



World Food Programme

SPECIAL REPORT

Summary

FAO/WFP CROP AND FOOD SECURITY ASSESSMENT MISSION TO MADAGASCAR

21 December 2018



Photographs: ©FAO/L. Castaldi.

This report has been prepared by Jonathan Pound and Luigi Castaldi (FAO) and Maherisoa Rakotonirainy (WFP) under the responsibility of the FAO and WFP Secretariats with information from official and other sources. Since conditions may change rapidly, please contact the undersigned for further information if required.

Mario Zappacosta
Senior Economist, EST-GIEWS
Trade and Markets Division, FAO
E-mail: giews1@fao.org

Chris Nikoi
Regional Director
OMJ, WFP
E-mail: chris.nikoi@wfp.org

FAO information products are available on the FAO website (www.fao.org/publications) and can be purchased through publications-sales@fao.org.

Please note that this Special Report is also available on the Internet as part of the FAO World Wide Web www.fao.org at the following URL address: <http://www.fao.org/giews/> and <http://www.wfp.org/food-security/reports/CFSAM>

The Special Alerts/Reports can also be received automatically by E-mail as soon as they are published, by subscribing to the GIEWS/Alerts report ListServ. To do so, please send an E-mail to the FAO-Mail-Server at the following address: mailserv@mailserv.fao.org, leaving the subject blank, with the following message:

subscribe GIEWSAlertsWorld-L

To be deleted from the list, send the message:

unsubscribe GIEWSAlertsWorld-L

Please note that it is possible to subscribe to regional lists to only receive Special Reports/Alerts by region: Africa, Asia, Europe or Latin America (GIEWSAlertsAfrica-L, GIEWSAlertsAsia-L, GIEWSAlertsEurope-L and GIEWSAlertsLA-L). These lists can be subscribed to in the same way as the worldwide list.

SPECIAL REPORT

Summary

FAO/WFP CROP AND FOOD SECURITY ASSESSMENT MISSION TO MADAGASCAR

21 December 2018

The designations employed and the presentation of material in this information product do not imply the expression of any opinion whatsoever on the part of the Food and Agriculture Organization of the United Nations (FAO) concerning the legal or development status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries. The mention of specific companies or products of manufacturers, whether or not these have been patented, does not imply that these have been endorsed or recommended by FAO in preference to others of a similar nature that are not mentioned.

The views expressed in this information product are those of the author(s) and do not necessarily reflect the views or policies of FAO.

© FAO, 2019



Some rights reserved. This work is made available under the Creative Commons Attribution-NonCommercial-ShareAlike 3.0 IGO licence (CC BY-NC-SA 3.0 IGO; <https://creativecommons.org/licenses/by-nc-sa/3.0/igo/legalcode>).

Under the terms of this licence, this work may be copied, redistributed and adapted for non-commercial purposes, provided that the work is appropriately cited. In any use of this work, there should be no suggestion that FAO endorses any specific organization, products or services. The use of the FAO logo is not permitted. If the work is adapted, then it must be licensed under the same or equivalent Creative Commons license. If a translation of this work is created, it must include the following disclaimer along with the required citation: “This translation was not created by the Food and Agriculture Organization of the United Nations (FAO). FAO is not responsible for the content or accuracy of this translation. The original [Language] edition shall be the authoritative edition.

Disputes arising under the licence that cannot be settled amicably will be resolved by mediation and arbitration as described in Article 8 of the licence except as otherwise provided herein. The applicable mediation rules will be the mediation rules of the World Intellectual Property Organization <http://www.wipo.int/amc/en/mediation/rules> and any arbitration will be in accordance with the Arbitration Rules of the United Nations Commission on International Trade Law (UNCITRAL).

Third-party materials. Users wishing to reuse material from this work that is attributed to a third party, such as tables, figures or images, are responsible for determining whether permission is needed for that reuse and for obtaining permission from the copyright holder. The risk of claims resulting from infringement of any third-party-owned component in the work rests solely with the user.

Sales, rights and licensing. FAO information products are available on the FAO website (www.fao.org/publications) and can be purchased through publications-sales@fao.org. Requests for commercial use should be submitted via: www.fao.org/contact-us/licence-request. Queries regarding rights and licensing should be submitted to: copyright@fao.org.

Mission Highlights

- National paddy (rice) production in 2018 is estimated at about 3.3 million tonnes, 9 percent higher than the reduced output in 2017, but still 8 percent below the previous five-year average (2013–2017).
- The year-on-year increase mostly reflects favourable weather conditions in several of the key rice-producing regions. A larger production increase was curbed by a weather-reduced output in Vakinankaratra Region, the main rice producing region.
- In the southern regions of Atsimo Andrefana, Androy and Anosy, which have the highest prevalence of food insecurity, below-average precipitation largely characterised the 2017/18 agricultural season, resulting in significant output reductions.
- The country was struck by cyclones Ava (January) and Eliakim (March) that adversely affected paddy and cash crop production along east and north coasts.
- Outbreaks of Fall Armyworm were reported in the country for the first time in November 2017 and adversely affected maize production in several regions.
- National maize production is estimated at 215 000 tonnes, 24 percent lower than 2017 and 36 percent below the average.
- Production of cassava – the second most important food crop in terms of calories consumed – is estimated at about 2.5 million tonnes, comparable to the previous year's level, but 9 percent below the average.
- Import requirements for rice in the 2018/19 marketing year (April/March) are estimated at approximately 530 000 tonnes, compared to 727 000 tonnes imported in the 2017/18 marketing year.
- The number of severely food insecure people is estimated to have decreased in the southeastern regions of Atsimo Atsinanana and Vatovavy Fitovinany, reflecting a moderate increase in the 2018 harvest compared to the drought-reduced 2017 output. Conversely, in the southern regions of Androy, Anosy and Atsimo Andrefana, the food security situation worsened due to a sharp decrease in cereal production in 2018.
- In the southern regions, only one in ten households were assessed to have acceptable access to food, and the majority of these households consume less than four food groups. Moreover, households' food stocks were estimated to have been exhausted by August. As a result there was an earlier-than-normal dependency on market supplies, while a large proportion of households reverted to negative coping strategies that are detrimental to their livelihoods.
- The Mission estimates that 564 000 people are severely food insecure in southern, southeastern and eastern regions. An additional 2.35 million people are estimated to be moderately food insecure in these regions.
- The high levels of food insecurity are underpinned by structural poverty and low incomes, with further analysis revealing that acute transitory food insecurity is highly sensitive to negative shocks. Interventions that address both short- and long-term factors of food insecurity therefore need to be closely coordinated.

OVERVIEW

Background

A joint FAO/WFP Crop and Food Security Assessment Mission (CFSAM) was requested by the Government of Madagascar due to concerns related to the impact of an extended dry period in southern regions and localized flooding in central regions. The Mission visited the country from 30 July to 11 August 2018 to evaluate factors affecting agricultural production, estimate the national cereal output and assess the overall food and nutrition security situation. The Mission benefited from technical and logistical support from the Agriculture Statistic Service of the Ministry of Agriculture and Livestock.

Similar to the previous year, the Mission conducted two simultaneous country-wide surveys. The first was related to the assessment of the agriculture sector and the second was to evaluate the severity and type of food security. The surveys were conducted in 21 regions (out of 22) between 11 July and 12 August 2018. The questionnaires covered seven thematic areas: climate; pest and plant diseases; access to and availability of inputs; crop production; livestock and fisheries; markets and prices; food stocks; and nutritional status of households. In total, 5 400 households were interviewed, and 306 focus group discussions were conducted. Each team consisted of an evaluation officer and a minimum of three enumerators, and prepared a narrative summary report following the completion of the field work. The Mission also conducted separate field visits in Alaotro Mangoro and Vakinankaratra regions, two of the main rice-producing regions.

The Mission held meetings with:

- Governmental institutions: the Ministry of Agriculture and Livestock; Plant Protection Department of the Ministry of Agriculture; the Ministry of Commerce; the National Institute of Statistics (INSTAT); the National Bureau of Disaster Risk Management; the Central Bank of Madagascar; Observatoire du Riz.
- Bilateral and multilateral agencies: The United States Agency for International Development (USAID).
- Financing institutions: The World Bank.
- NGOs and other technical cooperation structures: FEWSNet.
- Decentralized governmental institutions: regional Directorates of Agriculture and Livestock.
- Private companies: traders and producer organizations.

These meetings were intended to:

- Brief the institutions on the Mission's expected outputs.
- Collect information on prevailing conditions and policies related to the economy, agriculture sector and food security.
- Gather information on partners' interventions in the agriculture sector and actions to alleviate food insecurity in 2018/19, as well as prospects in the short and medium term.
- Seek the views of stakeholders/partners on the main factors affecting the 2017/18 cropping season and production prospects.
- Enquire about the use of the CFSAM reports and expectations regarding the results of the assessment.

Summary of results

The main agricultural season in 2017/18 was characterized by average to above-average rainfall in most of the key rice-producing regions, in contrast to the drier conditions observed in the previous year. However, torrential rains, associated with the passage of tropical Cyclone Ava at the beginning of January 2018, caused localized flooding that adversely impacted paddy crops, particularly in Vakinankaratra, the main paddy-producing region. In Alaotra Mangoro, Itasy and Bongolava, also key paddy-producing regions, the effects of localized flooding were less severe and overall weather conditions were favourable, instigating year-on-year production gains that more than offset the reduced output in Vakinankaratra region. In the southern regions of Atsimo Andrefana, Androy and Anosy, where the prevalence of food insecurity is high, in contrast to the beneficial climatic conditions in the previous year, seasonal rainfall was generally below-average, resulting in significant cereal output reductions in 2018.

The impact of Cyclone Eliakim in mid-March resulted in damage to some cash crops, particularly clove crops that were at the flowering stage. However, vanilla crops, a key export earner, were less affected as the cyclone did not traverse the main producing regions.

In November 2017, the Fall Armyworm (FAW) was detected in the country. Although it was not possible to quantify the impact of FAW on cereal production, based on field visits and discussions with decentralized offices of the Ministry of Agriculture, the Mission corroborated the main findings of an earlier FAO assessment that was conducted in March 2018 and indicated a high prevalence of the pest.

Overall, the national paddy output in 2018 is estimated at about 3.3 million tonnes, 9 percent above the reduced output in 2017, although 8 percent lower than the previous five-year average (2013–2017). The yearly production increase is mainly associated with the generally beneficial weather conditions in key paddy-producing areas. Production of maize is estimated at 215 000 tonnes, 24 percent lower than 2017 and 36 percent below the average, reflecting unfavourable weather conditions in the main producing regions. Cassava production – the second most important food crop in terms of calories consumed – is estimated at 2.5 million tonnes, comparable to the previous year's harvest, but still 9 percent below average.

Long-term structural challenges continue to impede agricultural productivity, mostly relating to an inadequate irrigation system, due to poor maintenance and limited investment in the agro-hydrological infrastructure. In addition, the limited availability of improved seeds varieties and low use of fertilizers, due in part to farmers' diminished purchasing power, continued to be salient impediments that restrained productivity and maintained a reliance on extensification strategies to raise production in 2018.

The livestock sector also continues to exhibit restrained growth, with incidences of diseases and insecurity (theft) considered to be the main obstacles to growth.

Prices of rice increased rapidly at the end of 2017 and reached record highs in January 2018, on account of the sharply reduced harvest in 2017. However, a significant volume of rice imports in the 2017/18 marketing year eased supply constraints, curbing pressure on prices, while new supplies from the 2018 harvests further augmented market availabilities and led to seasonal price declines between February and June 2018. In the following months prices increased and as of September retail rice prices were close to the elevated levels of the preceding year, underpinned by overall tight supplies and a weaker currency that inflated import costs. The highest rice prices were recorded in northern regions, while in the southern regions they remained stable but at elevated levels.

Despite the upturn in the 2018 paddy output, national supplies remain tight in the 2018/19 marketing year (April/March) and, consequently, import requirements for rice are estimated at an above-average level of 530 000 tonnes. This quantity is, however, well below the 727 000 tonnes imported in the previous year.

Food security conditions worsened in the southern regions of Androy, Anosy and Atsimo Andrefana driven by production declines in 2018, however the situation improved in the southeastern regions of Atsimo Atsinanana and Vatovavy Fitovinany, on account of the moderate production upturns in 2018. Overall, the Mission estimated that 564 000 people are severely food insecure in southern, southeastern and eastern regions, and require emergency interventions. This estimate is about one-third above the caseload assessed in the previous year. An additional 2.35 million people are estimated to be moderately food insecure in these regions.

The reduced harvests in southern regions negatively affected households' food access and availability, as well as adversely impacting on livelihoods. As a result, only one in ten households were estimated to have acceptable levels of food access. The CFSAM results also indicated that the majority of households consume fewer than four food groups. Given the reduced food supplies from own production, households, particularly in Androy, were expected to have exhausted their food stocks by August and resulted in an earlier-than-normal dependency on market supplies. Moreover, many households were forced to sell livestock and engage in survival strategies to obtain food, further eroding livelihoods.

The highest prevalence of food insecurity is estimated in Beloha district (Androy region), where 86 percent of the population were evaluated to be food insecure, of which 41 percent of households are categorized in severe food insecurity conditions, double the level of the previous year. In Tsihombe district (Androy region), severe food insecurity affects more than one third of the population, while in Betioky and Ampanihy districts (Atsimo Andrefana region), as well as Amboasary district (Anosy region), the rate of severe food insecurity also remained at a high level. One consequence of the poor conditions has been an increase in the levels of migration. Many households have moved to the districts of Bekily and Ambovombe, which has contributed to a steep year-on-year rise in the level of severe food insecurity in 2018: from 6 percent to 31 percent in Bekily, and from 10 percent to 40 percent in Ambovombe. Although the rates of food insecurity remain high in most districts of Anosy, there has been some improvements, notably in Taolagnaro districts.

RECOMMENDATIONS

Agriculture

- Implement programmes to promote the use sustainable and ecological pest management programme for smallholder farmers.
- Actively monitor FAW, particularly outbreaks in paddy fields, to facilitate rapid assessments and interventions.
- Support and promote vegetable cultivation and off-season production, to improve crop diversification.
- Support to the promotion of innovative agricultural practices, particularly climate smart agriculture (including the application of agro-ecological practices and use of short-cycle varieties).
- Improve water management systems, through the establishment and rehabilitation of hydro-agricultural infrastructure.
- Revitalize the seed production system, to ensure adequate availability and access.

Food security

In regard to food security, assistance is required for most vulnerable segments of the population to minimize the impact of the prevailing conditions and prevent a further degradation. These measures include:

- Early implementation of humanitarian response in the lean season, especially in areas where there is a high prevalence of severe food insecurity.
- Expand emergency food assistance to meet the food needs of the severely food insecure and moderately food insecure households who are at risk of falling into severe food insecurity during the peak lean season.
- Interventions to contribute to strengthening the resilience of households and communities.
- Coordinate multi-sectoral interventions for the protection and recovery of livelihoods and productive assets of vulnerable households, accompanied by targeted food and nutrition assistance for the most vulnerable populations.
- Support for the 2018/19 agricultural campaign; including the provision of food rations in conjunction with FAO's support to the agriculture sector, particularly in areas that experienced sharp production declines in 2018, where seed consumption and sales of productive assets are frequent.
- Strengthen synergies between WASH interventions and school feeding programmes.
- Treatment and prevention of malnutrition.
- Continuous monitoring of food prices.