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SPECIAL REPORT

Summary

**FAO/WFP CROP AND FOOD SECURITY ASSESSMENT MISSION
TO MADAGASCAR**

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Highlights

- Rice production (Madagascar's staple crop) in 2014 is estimated at about 4 million tonnes (in paddy terms), 10 percent higher than the sharply reduced 2013 harvest, but down 13 and 9 percent compared to 2012 and the previous five-year average, respectively. Maize and cassava production declined by 4 and 6 percent, respectively, compared to 2013.
- Rainfall during the 2013/14 cropping season was generally well distributed in northern and some central regions, while uneven precipitation was observed in southern regions, limiting further production gains.
- The first phase of the anti-locust campaign, implemented by FAO and the Government of Madagascar, treated an area of more than 1.2 million hectares, of which half was located in the more affected southern regions. Despite significant localized damage to maize and rice crops in the south and west, the campaign prevented the extension of the locust plague and limited larger crop losses.
- Livestock conditions are generally favourable; however, cattle rustling is still prevalent, especially in the south, resulting in reduced livestock numbers. Fish stocks have decreased as a result of the large influx of new fisher folk, as well as the use of prohibited equipment and practices.
- Prices of rice were lower in 2014 compared to the previous year, reflecting the improved supply situation; however, sharp price spikes for maize and cassava were observed in some southern parts of the country.
- An import requirement of about 235 000 tonnes (milled equivalent) of rice is estimated in the 2014/15 marketing year (April/March), about 56 percent below last year but similar to the previous five-year average, all of which is anticipated to be imported commercially. An additional 60 000 tonnes of maize imports would also be required to satisfy domestic requirements.
- Food security deteriorated in southern regions, notably Androy and Atsimo Andrefana, which were affected by reduced cereal outputs. However, improved conditions were recorded in northern and some central regions compared to 2013.
- Over two-thirds of the surveyed households exhibited poor or limited consumption levels. Expenditure on food products is also high, with up to 75 percent of households' budget allocated to food purchases, rendering them susceptible to high prices and market shocks.
- Based on the survey results, rates of food insecurity indicate about 6 percent of rural households to be severely food insecure, 30 percent moderately food insecure and 50 percent to be at risk. Overall, the rate of food insecurity (moderate and severe) is estimated at about 36 percent.

OVERVIEW

Madagascar experienced a 2013/14 cropping season (October-July) marked by locust damage and poor distribution of rains in southern regions. In the more productive northern regions, favourable climatic conditions were observed and production gains were estimated in these parts. Given the uncertain production outcomes in the south and the impact of the locusts, the Government of Madagascar requested a joint FAO/WFP Crop and Food Security Assessment Mission (CFSAM), which benefited from technical and logistical support from the Direction de la Statistique Agricole, de la Planification et du Suivi-Evaluation (DSAPSE) of the Ministry of Agriculture and Rural Development (MinAgri). The Mission's remit was to identify and evaluate factors impacting on agricultural production in 2014, estimate national cereal production and assess the overall food security situation.

The Mission visited Madagascar from 18 June to 17 July 2014, and initially held meetings with representatives from a number of ministries and national institutions, including: MinAgri, the Institut National de la Statistique (INSTAT), the Ministry of Commerce, the Director of Customs, the Observatoire du Riz (OdR), the African Development Bank, the European Union (EU), USAID and the World Bank, to gather data on national agriculture developments and policies, as well to review the prevailing economic conditions. Data from the OdR formed the basis of the price analysis.

The Mission visited a total of 14 regions to conduct a survey and carry out field assessments. Seven survey teams were deployed to eight regions, while FAO and WFP staff visited the six additional regions and two of the surveyed regions. The field assessments enabled the Mission to triangulate survey results and gain a broader understanding of the prevailing agriculture and food security situation. In total, 1 051 households and 60 focus groups were surveyed. Given the prevailing situation in the country, a significant portion of the survey focused on the impact of locusts on agricultural production. The Mission also met with key persons of the agricultural sector (farmers, fisher folk and agricultural technicians) and held meetings with officials from the regional Offices of Nutrition (ORN).

Overall, improved climatic conditions were recorded in the 2013/14 cropping season. In particular, northern regions received good rains favouring crop production, however, localized floods negatively impacted on crops in parts of Boeny and Itasy. In contrast, southern regions experienced generally poor rainfall distribution, characterized by a late start and early cessation, which limited potential yields, offsetting the impact of an estimated increase in plantings. The Malagasy migratory locust plague was more concentrated in the south and west, particularly in Androy and Atsimo Andrefana, and mainly affected the maize and rice crops. The anti-locust campaign, which began its first operations in November 2013 and is jointly implemented by FAO and the Government of Madagascar, treated more than 1.2 million hectares through both aerial and ground operations, preventing an expansion of the locust plague and reducing the overall impact on cereal crops in 2014.

Overall, the Mission estimates that the 2014 rice output increased by 10 percent to approximately 4 million tonnes (in paddy terms). At this level, the harvest is still 9 percent below the previous five-year average. Despite an estimated increase in rice plantings compared to 2013, yields were negatively affected by poor seed quality, inadequate water management, uneven rainfall distribution in parts, and locust attacks. Maize and cassava production are estimated to have decreased by 4 percent and 6 percent, respectively. Cassava production in Androy and Atsimo Andrefana declined sharply as a consequence of the widespread use of cuttings contaminated with cassava mosaic disease, which has become endemic in southern regions.

Livestock conditions are generally good, largely on account of improved pastures. However, the number of cattle is estimated to have decreased, mainly as a result of insecurity and cattle rustling, particularly in Atsimo Andrefana and Androy. Honey production this year is not expected to reach the 3 000 tonnes achieved in 2013, due to the spread of "varoase" disease that decimated hives in the highlands and along the east coast. In regard to the fishery sector, pressure on stocks has increased significantly in recent years following the influx of new fisher folk, which has contributed to a decrease in stocks. Poor fishing practices and the large-scale use of prohibited fishing materials have exerted further pressure on fish supplies.

Reflecting the improved rice supply situation in 2014, the national average paddy price decreased compared to the previous year, but still remained above the levels observed in 2012. Sharp food price spikes were observed in southern parts of the country, including Anosy where prices of maize and dried cassava surged between October 2013 and February 2014, in response to supply shortages.

The national rice import requirement for the 2014/15 marketing year (May/April) is forecast at a near-average level of 235 000 tonnes, which is expected to be entirely satisfied by the commercial sector. In the previous 2013/14 marketing year, an estimated 540 000 tonnes were imported to compensate for the sharply reduced rice output. An estimated 60 000 tonnes are needed to satisfy the maize deficit, while 143 000 tonnes of wheat are forecast to be imported to meet domestic requirements.

As a result of the poor cereal outputs, the food security situation was estimated to have deteriorated in southern regions, notably in Androy and Atsimo Andrefana. However, improved conditions were observed in northern and some central regions compared to 2013. Based on the survey results, the Mission estimated 6 percent of rural households to be severely food insecure, 30 percent moderately food insecure and 50 percent to be at risk. Overall, the rate of food insecurity (moderate and severe) is estimated at about 36 percent.

A significant proportion of households in the south and southeast of the country are expected to face a difficult lean period (October-March). The factor that poses the biggest risk is a rise in food prices, given households' low purchasing power and the fact that a large proportion of their budgets are allocated to food purchases; over two-thirds of the surveyed households spent 75 percent of their budget on food.

Own production and market supplies were cited as the main sources of food, the proportions of which vary by region. Households in Atsimo Andrefana satisfy most of their daily consumption requirements from market supplies while in Atsimo Atsinanana own production is the main source. In Androy, the gathering of wild foods constitutes an important source of food, which normally characterizes emergency conditions. In general, households suffer from low quality diets and limited quantities of food, based around one staple food (rice, cassava or maize), with limited consumption of vegetables and fruit, and a minimal intake of animal protein. Sugar and oil were estimated to be consumed once a week, on average. The regions of Androy, Atsimo Andrefana and Atsimo Antsinanana were estimated to have the highest proportion of households with poor food consumption profiles.