

SPECIAL REPORT

FAO/WFP CROP AND FOOD SECURITY ASSESSMENT MISSION TO MADAGASCAR

9 October 2013

Highlights

- Madagascar's 2013 rice output is estimated at 3.6 million tonnes (paddy), about 21 percent below the above-average level of 2012. Maize and cassava production are also estimated to have declined compared to the previous season, by 15 and 14 percent respectively.
- The country is estimated to have a rice deficit of about 240 000 tonnes (milled equivalent) for the 2013/14 marketing year (April/March), while approximately 48 000 tonnes of imported maize would be required to satisfy the national deficit.
- Uneven rainfall distribution (both temporally and spatially), and a delayed start of the 2012/13 rainy season by one to two months, were observed in the intensive rice producing regions in the north and center of the country. As a result significant reductions in the rice output were estimated in north-eastern regions, of up to 60 percent, relative to 2012's harvest.
- Increased production in some large producing central regions, including Vakinankaratra, helped to limit a larger decline in the national rice output.
- Damage caused by cyclone Haruna in February 2013, caused widespread crop losses in south-western parts, due to flooding and siltation, resulting in rice crop losses of up to 70 percent in Atsimo Andrefana, relative to the short-term average.
- The impact of the locust plague has been most severe in the southwest, which contributes on average about 7 percent to the national rice output. However, although the impact of the locust plague has been comparatively limited on the national rice production, it had a significant impact on the livelihoods of the households in affected area. In addition, the locust plague, which has already reached some of the main rice producing regions in the north, is expected to have a serious impact on next season's crop, if not controlled.
- High costs and low purchasing-power have restricted access to agricultural inputs, including seeds and fertilizers, for the 2012/13 agricultural season, further contributing to the reduced cereal production.
- In regard to the fisheries sector, low water levels in lakes, following insufficient rains in 2012/13 and the use of non-regulatory nets were the main factors responsible for the decline in fish production.
- Production expectations for the second season crops (harvest commenced in September) are unfavorable due to insufficient rainfall in 2013 and impact of the locust plague.
- The low agricultural production is expected to result in a longer, as well as earlier start to the lean season. The significant increase in price of rice and cassava has further compounded the situation, negatively impacting on households' purchasing power and consequently food access. Food consumption is limited in many parts of the country, with a higher prevalence in the south, southwest and eastern regions, as well as in some of the productive agricultural zones, including the central plateau and some northern regions. About 47 percent of households in Vatovavy Fitovinany region (eastern coast), and between 40 and 45 percent of households in the regions of Androy, Anosy and Atsimo Atsinanana (located in the south) have poor food consumption. Androy has the highest prevalence of households with poor food consumption levels, estimated at 25 percent.
- Households' diets with poor and limited food consumption are primarily based on cereals, with a severe lack of vegetable and animal protein intake. The sources of food are limited, and most households meet their consumption requirements through food purchases and, to a lesser extent, with supplies from their own production.



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- Food is the main expense for more than a third of households in the country, especially for those living in the southern plateau (Amaron'i Mania region) and in the south (Androy region). For these households, more than 75 percent of their expenditure is allocated to food purchases.
- Poor rains and the subsequent reduction in crop production was a major shock for about 30 percent of households. In addition, the two other primary shocks to households in 2012/13 were cyclone Haruna and food price increases, particularly during the period between January and March 2013, when prices tend to peak seasonally and when significant parts of the country were affected by the cyclones. In response, households implemented a variety of coping strategies, in particular switching to cheaper food products and reducing food rations. These strategies were widely adopted in southern and eastern coastal areas, as well as in parts of the northern and central plateau.
- In total, an estimated 3 957 618 persons in rural areas suffer from food insecurity. This represents about 28 percent of the households (in rural areas) in the 20 regions surveyed. Only 11 percent of rural households were assessed to be food secure. Severe food insecurity is widespread in the south (including the regions of Androy, Atsimo Atsinanana and Atsimo Andrefana), in the southern parts of the central plateau (Ihorombe) and in some of the productive areas, including Alaotra Mangoro. Many households across the country are at risk of food insecurity during the lean period, between October and March.

OVERVIEW

Following the outbreak of the Malagasy migratory locust, which began in 2012, and erratic weather conditions during the 2012/13 cropping season (October-July), an FAO/WFP Crop and Food Security Assessment Mission (CFSAM), which included both financial and technical support from IFAD and the Ministry of Agriculture (MinAgri), visited Madagascar from 19 June to 13 July. This support enabled the Mission to expand the survey to 20 regions of the country. The Mission's remit was to identify and evaluate factors impacting on agricultural production in 2013 and to estimate national cereal production, as well as to assess the overall food security situation.

The Mission conducted a household survey, based on a previously prepared questionnaire but adapted to reflect the prevailing conditions in 2012/13, in all but two regions of the country (Diana and Sava). The survey was tested in June to ensure accuracy and consistency of responses, and was administered by MinAgri. The enumerators received training in Antananarivo from the Mission's Team Leaders. The questionnaire was divided into nine sections, and a total sample of 3 720 households were surveyed. Enumerators held focus group discussion to supplement the survey data, while FAO and WFP staff, in addition, conducted field visits to central and southern regions. The survey data, which included estimates on yields and area planted, formed the basis of the rice, maize and cassava production estimates at the regional level. Production estimates and survey findings were also cross-checked with satellite derived weather indicators and as well as by fields visit by FAO and WFP.

The Mission also 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 World Bank, the African Development Bank and the European Union (EU), to further assess the country's agricultural status and policies, as well as prevailing economic performance. Data from the OdR formed the basis of the price analysis, while market visits and meetings held with the National Rice Platform helped to inform the analysis of the rice market and import forecasts for the 2013/14 marketing year (April/March).

The 2012/13 cropping season was characterized by erratic weather conditions, with a slightly delayed start of seasonal rains, and interrupted by a prolonged dry spell in December and January. The cyclone season (October-April) brought heavy rains with the arrival of Felleng and Haruna in the first quarter of 2013, which caused floods and crop damage in the north-east and south-western areas. In particular, cyclone Haruna caused extensive damage to both standing crops and irrigation systems in the southern region of Atsimo-Adrefana, with nearly 40 000 hectares of cropped land damaged or destroyed. This was followed by a period of rainfall deficits across most of the country, limiting potential yields and concurrently preventing replanting of crops that were destroyed by the cyclones. In addition to water deficits, the locust plague further contributed to a decrease in production, particularly in the south-west, both through damage to vegetation and with many farmers citing the potential destruction of crops as a reason that limited their plantings. However, the south-western regions only contribute a small proportion to the national rice output, and therefore the impact of the locust plague at the national level has been more limited.

The Mission estimated that rice production in 2013 declined by 21 percent compared with the above-average harvest of 2012. As a result, a national rice deficit of 240 000 tonnes is estimated for the 2013/14 marketing year. Commercial imports are expected to cover the bulk of the deficit, exceeding the quantity imported in the previous year. In addition, per caput consumption for rice has been revised downwards relative to previous Missions' estimates, given the reduced national production. However, at the current level, the estimate is consistent with analysis from INSTAT and FAOSTAT. Maize production in 2013 will also not satisfy domestic requirements and an estimated 48 000 tonnes of imported maize will be required to help bridge the deficit.

Prices of local rice were at higher levels in 2013, reflecting tighter national supplies, as a result of an estimated decrease in the 2013 harvest. Unlike previous years, local rice prices did not experience a strong seasonal decline following the start of the first harvests in February and consequently prices are expected to continue to remain above the levels of 2012 throughout the rest of 2013 and beginning of 2014. Prices of imported rice, however, have remained relatively constant during 2013, on account of generally stable exchange rate and export prices from the main suppliers of the country.

Households' food security conditions have deteriorated as a result of increasing food prices, low crop production, the impact of cyclone Haruna and the locust invasion during 2013. Food consumption is limited for many households in southern and eastern coastal regions, which are most vulnerable to food insecurity in Madagascar, and even in some food basket areas in the central and northern plateau. Households mainly suffer from inadequate food intake and insufficient meals. Diets for households with poor and limited consumption are lacking animal protein intake (such as meat, fish and eggs), while vegetal proteins such as pulses are consumed rarely. To help mitigate the impact of the recent shocks, primarily poor harvests and food price increases, as well as the locust outbreak, households have opted to purchase less expensive foods and to reduce food rations, thus aggravating their food security conditions.

The Mission also indicated that food is the main expense for about one third of households, who allocate up to 75 percent of their budget on food purchases. These figures are likely to increase as prices rise, while wages have not been adjusted to the current inflation rates. According to the survey results, approximately 28 percent of rural households suffer from food insecurity, translating into an estimated 3 957 618 persons in the 20 regions surveyed. Severe food insecurity is widespread in the southern regions (Androy, Atsimo Atsinanana and Atsimo Andrefana), the regions of the southern plateau (including Ihorombe) and in the food basket region of Alaotra Mangoro. About 61 percent of people are at risk of food insecurity across most of the country and this will require target monitoring.

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