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# SPECIAL REPORT

## Summary

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

22 December 2017



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# **SPECIAL REPORT**

**Extract**

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

**22 December 2017**

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### **Mission Highlights**

- National rice (paddy) production is estimated at just over 3.1 million tonnes in 2017, 20 percent below 2016's output and 19 percent down compared to the previous three-year average (2013-2015).
- The decrease is mostly due to a delayed start of the rainy season and severe mid-season dry conditions that particularly affected the major rice-producing regions in the north, centre and east.
- The country was also struck by Cyclone Enawo that further negatively affected the 2017 cereal output. However, the associated heavy rains partly reversed early seasonal water deficits in some regions, helping to limit the impact of water stress where cyclone damage was negligible.
- In the southern regions of Androy and Anosy, weather conditions were more favourable supporting moderate year-on-year production gains in 2017, following three consecutive years of drought-reduced outputs. However, the 2017 harvests still remained below average.
- National maize production is estimated at 280 000 tonnes, about 20 percent below the 2013-2015 average, mainly reflecting the impact of dry weather conditions. Cassava production is estimated at about 2.5 million tonnes, a 4 percent reduction compared to the previous year.
- As a result of tighter domestic supplies, rice prices started to increase at the beginning of 2017. Since May, prices had stabilized reflecting the large import volumes and the newly-harvested crops that eased supply pressure, however, prices remained higher on a yearly basis.
- Import requirements for rice in the 2017/18 marketing year (April/March) are estimated at approximately 570 000 tonnes, compared to the 241 000 tonnes which were imported in the previous marketing year. It is expected that commercial imports will almost entirely meet this deficit. Total cereal import requirements (including maize and wheat) are estimated at 832 000 tonnes.
- Based on the results from the Mission's household food security survey, there has been a reduction in the number of severely food insecure in southern regions, mainly reflecting an improved agricultural output in Androy and Anosy. By contrast, in southeastern areas, the number of moderately food insecure has risen following weather shocks.
- The Mission estimates that 407 655 people are severely food insecure in the south and southeast, compared to almost 600 000 in 2016, while an additional 1.7 million people are estimated to be moderately food insecure. Of the moderately food insecure, 35 percent are reported to have adopted negative coping strategies and, therefore, remain at a high risk of falling into severe food insecurity without humanitarian assistance.
- The most vulnerable populations are characterized by female and elderly-headed households, often with limited productive assets and are predominantly reliant on agriculture as a main source of livelihood.

## **OVERVIEW**

### **Background**

A joint FAO/WFP Crop and Food Security Assessment Mission (CFSAM), at the request of the Government of Madagascar, visited the country from 24 July to 11 August 2017, following weather shocks that negatively adversely affected the 2016/17 agricultural campaign. The Mission's remit was to evaluate the factors impacting on agricultural production, estimate the national cereal output and assess the overall food and nutrition security situation. The Mission benefited from the technical and logistical support from the Directorate of Information Systems (DIS) of the Ministry of Agriculture and Livestock attached to the Office of the President.

As in the previous year, the Mission conducted two simultaneous country-wide surveys, one for the estimation of agricultural production and a second vulnerability assessment to ascertain the level and type of food insecurity. The surveys were conducted in 21 regions (out of 22) between 17 July and 4 August 2017. 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 the nutritional status of households. In total, 3 000 households were interviewed and 200 focus group discussions were conducted. Each team consisted of an evaluation officer and a minimum of three enumerators. Each team prepared a narrative summary report that was presented during the debriefing meeting. The Mission also conducted field visits in Alaotro Mongoro, Boeny and Vakinankaratra regions.

Prior to the field visits, the Mission held meetings with:

- Governmental institutions: the Ministry of Agriculture and Livestock attached to the Office of the President, the Ministry of Fisheries, the Ministry of Commerce; the National Institute of Statistics (INSTAT), the Central Bank of Madagascar and Météo Madagascar.
- Bilateral and multilateral agencies: the European Union, the United States Agency for International Development and the International Fund for Agricultural Development.
- Financing institutions: the African Development Bank and the World Bank.
- NGOs and other technical cooperation structures: CARE, WWF, FEWSNet.
- Decentralized governmental institutions: regional directorates of Agriculture and Livestock.
- Private companies: traders and producer organizations.

These meetings were intended to:

- Advise on the approach, objectives and expected results of the Mission, in order to provide a common understanding among stakeholders and clearly outline their contributions to the Mission's objectives.
- Collect relevant information for the analysis of the current socio-economic situation.
- Collect data on prevailing conditions and policies regarding agricultural development and food security.
- Gather information on partners' interventions on agriculture and food security in 2017, as well as their prospects in the short and medium term.
- Seek the views of stakeholders/partners on the main factors affecting the 2016/17 cropping season and production prospects.
- Enquire about partners' expectations regarding the results of the CFSAM, particularly on the use of the analysis to inform and guide interventions.
- Discuss any other issues of interest for agricultural development, food security and resilience.

### Summary of results

The main agricultural season in 2016/17 was characterized by insufficient and poorly-distributed precipitation in the main rice-producing regions of the country, reflecting a delayed start of the rainy season and a dry period (three months of below-average rains between December 2016 and February 2017). The resulting water deficits caused a contraction in plantings, restrained crop development and resulted in below average yields, triggering a sharp reduction in this year's rainfed and irrigated rice outputs. In addition, Cyclone Enawo, which traversed the country in March 2017, brought heavy rains that caused flood damage and further adversely affected the rice output, as well as vanilla crops, a key export commodity. However, in the areas where the cyclone damage was negligible, the associated heavy rains partly alleviated the water deficits, limiting the impact of early seasonal water stress and curbing further production losses.

As a result of the above-mentioned weather shocks, national paddy production in 2017 is estimated at about 3.1 million tonnes, a decrease of 20 percent on an annual basis and 19 percent down compared to the previous three-year average (2013–2015). Maize production is estimated at 280 000 tonnes, a year-on-year decrease of 11 percent and 21 percent below average. Similarly, the cassava national output is estimated at about 2.5 million tonnes, a 4 percent reduction compared to last year.

An inadequate irrigation system, due to poor maintenance and limited investment in the agro-hydrological infrastructure, further underpinned the weak agricultural performance this year, given farmers' high exposure to climate effects. In addition, limited availability of quality seeds remains a critical impediment to the development of a modern rice production system, while the low use of fertilizers continue to restrain productivity, increasing the reliance on extensification strategies to raise production.

At the subnational level, the largest decreases in rice production were in the main rice-producing regions in the north and centre. By contrast, outputs in the southern regions of Androy and Anosy increased on an annual basis on account of favourable weather conditions, following three consecutive years of dry weather-reduced outputs. However, the harvests in these regions still remained below average and are also of comparatively minor quantities in relation to the national output.

The livestock sector continues to exhibit restrained growth, with incidences of diseases and growing insecurity (theft) considered to be the main constraints that impede the further development of the sector.

As a result of the reduced 2017 rice output and consequently a tight supply situation, imports are expected to increase significantly in the 2017/18 marketing year (April/March) in order to sustain near-stable consumption rates, forecast at 98 kg per person per year, down 2 kg on a yearly basis. The 2017/18 food balance sheet indicates an import requirement of 567 000 tonnes, which is expected to be almost entirely covered through commercial channels. Already, between April and August, an estimated 220 000 tonnes have been imported, almost the same volume that was imported in the entire 2016/17 marketing year.

Rice prices increased across the country during the first half of 2017, triggered by expectations of a reduced output and further underpinned by low stock levels. Prices stabilized in May, reflecting new availabilities from the main harvest and large import volumes that eased supply pressure. However, prices remained higher on a yearly basis as of July.

Food insecurity in surveyed areas was already evident one month after the main harvest period, particularly in southern regions, where slightly less than one-fifth of the households are estimated to be severely food insecure and in the southeast where almost two-thirds of the households are considered to be experiencing moderate food insecurity. However, on account of an improved harvest in the southern regions, households have access to sufficient, but not very diversified food supplies relative to the previous year, while food sources of iron and proteins still remain acutely inaccessible. The most affected areas in the south are the districts of Tsihombe and Beloha (Androy Region) and in southeastern district of Farafangana (Atsimo-Atsinanana Region).

In terms of the stability of food security conditions, the situation in the southern regions is slightly less concerning than the previous years, due to the increased cereal harvest, reduced levels of debts and higher saving levels. However, relative to the previous year, there was a degradation of conditions in the southeast, which registered a sharp fall in cereal production, while, in addition, there was not an extensive humanitarian programme (in comparison to the southern regions) following the impact of El Niño in 2016.

The most vulnerable populations are characterized by female and elderly-headed households, often with limited productive assets and a high dependency ratio (households of more than ten people). These households predominantly rely on agriculture as their main source of livelihood and their housing conditions are of generally poor quality, particularly in relation to the access to safe water supplies and sanitation facilities.

In summary, an estimated 407 655 people are severely food insecure in the south and southeast, which refers to people unable to meet their food needs without external assistance. Another 1.7 million people are estimated to be moderately food insecure, inferring they are generally able to meet their food needs, except if there is a major shock. However, 35 percent of these people (approximately 595 000) were reported to be already adopting negative coping strategies or were spending a greater proportion of their income on food at the expense of other necessities, including health and education, and, therefore, remain at a high risk of falling into severe food insecurity without humanitarian assistance.

## **RECOMMENDATIONS**

### **Agriculture**

- Implementation of early recovery interventions and promotion of income diversification, in order to restore and reinforce vulnerable households' resilience to shocks in the areas affected by shocks (cyclone, dry conditions and pests).
- Support the training of farmers in improved production techniques that are adapted to local agro-ecological conditions.
- Increase investment for the Ministry of Agriculture and Livestock's extension services, to assist farmers in the implementation of improved agricultural techniques and promotion of crop diversification.
- Implement a robust and sustainable water management system for agriculture, human and livestock consumption, especially in southern areas.
- Rehabilitate and extend the rural road network to help facilitate increased market integration.

- Undertake an agricultural census to analyse the prevailing characteristics of agricultural holdings and their agricultural production activities, in order to support the Government and partner institutions in effective planning and policy-making.
- Increase the number of weather stations to enhance monitoring, assessment and forecasting of meteorological conditions.
- Strengthen communication between Météo Madagascar and users of weather information, particularly farming households, to improve effectiveness of weather forecasts.
- Support the implementation of a national strategy on the production of improved seed varieties and promote availability and access to agricultural inputs.

### **Food security**

Regarding the food security situation, it is critical that measures are implemented to limit the impact of the aforementioned shocks on vulnerable households, focusing on:

- The provision of immediate food assistance for the severe food insecure population.
- Coordinated interventions to protect and recover the livelihoods and productive assets of the vulnerable households, accompanied by a targeted distribution of food assistance for the most vulnerable groups.

Food assistance is needed to meet the immediate needs of farming households who have lost all their productive assets, particularly in the southeast. Moreover, they require seeds to be able to start the next growing season. Concerted efforts by WFP and FAO to protect seeds will be essential, in addition to food assistance distributions.

Emergency food assistance should be expanded to meet the food needs of the severely food insecure and the moderately food insecure households that are at risk of falling into severe food insecurity during the peak of the lean season. Moderately food insecure households that are able to engage in agricultural work, will need to be supported through conditional assistance during the lean season, building on programmes already under preparation.

Cash-based-transfer interventions should continue in existing coverage areas and be combined with market assessments to inform about the potential to scale-up implementations; more detailed information on markets' functionality is essential in this respect.

The continuation of therapeutic nutritional feeding and the introduction of a supplementation diet targeting children under five years old will be essential given the reports on deteriorating nutritional status (based on routine surveillance of underweight in the most affected areas), combined with the low consumption of nutritious foods. Continuing school feeding activities is also strongly recommended; families were reported to have removed their children from school to help collect wild fruit.

Emergency responses should be planned in the medium and long term. Sustainable investments in disaster risk reduction, strengthening emergency preparedness and response capabilities and advocating for concerted efforts to address the underlying structural issues in the southern and southeastern regions. Continual monitoring of the food security, market and nutrition situation is also essential to inform and promptly adjust humanitarian interventions.