FOOD SECURITY AND HUMANITARIAN IMPLICATIONS IN WEST AFRICA AND THE SAHEL

N°51 - November/December 2013

KEY POINTS

Sections

Agriculture

Locust

Displacement

International Markets

Markets in WA

Food Security

To go to...

- According to the *Cadre Harmonisé* results, 13 million people are food insecure (Burkina Faso, The Gambia, Niger, Senegal, Mauritania, Côte d'Ivoire and Chad) despite average harvests
- 4.5 million children under the age of five suffer from acute malnutrition in West Africa
- Localized pasture deficits may lead to an earlier pastoral lean season
- Cereal prices are decreasing on markets but remain above their respective five year averages in Burkina Faso, Niger, Nigeria and Chad
- The locust situation remains threatening in Mauritania

The cereal harvests, which are estimated to be above the five-year average in the Sahel region (+1%) and in the West Africa region (+16%) have spurred a seasonal price decrease in most markets. However, prices remain higher than their five-year averages in the eastern and western trade basins of the region, which affects the purchasing power of many vulnerable households, particularly in Chad, Niger and Ghana.

The chronic vulnerability of populations, erosion of livelihoods after recurrent crises (2008, 2010, and 2012), bad agro-pastoral productions in some areas, floods and other localized shocks explain the food insecurity of 13 million people at the end of 2013, despite average harvests.

Moreover, 4.5 million children suffer from acute malnutrition in West Africa and the Sahel region.

The regional partners highlight the urgent need of rebuilding national food stocks and the implementation of appropriate responses which fit population needs, particularly those of refugees and food insecure households. The decrease in agricultural production in some areas in the Sahel may lead to food and nutrition insecurity, which must be closely monitored.

Recommendations for regional partners

→ Advocacy for strengthening and accelerating the implementation of humanitarian interventions in Mali

→ Strengthen food security monitoring in the countries at risk including Mali, Niger, Nigeria, Senegal, Mauritania and Chad

→ Actively participate in the process of developing the Strategic Response Planning (SRP)

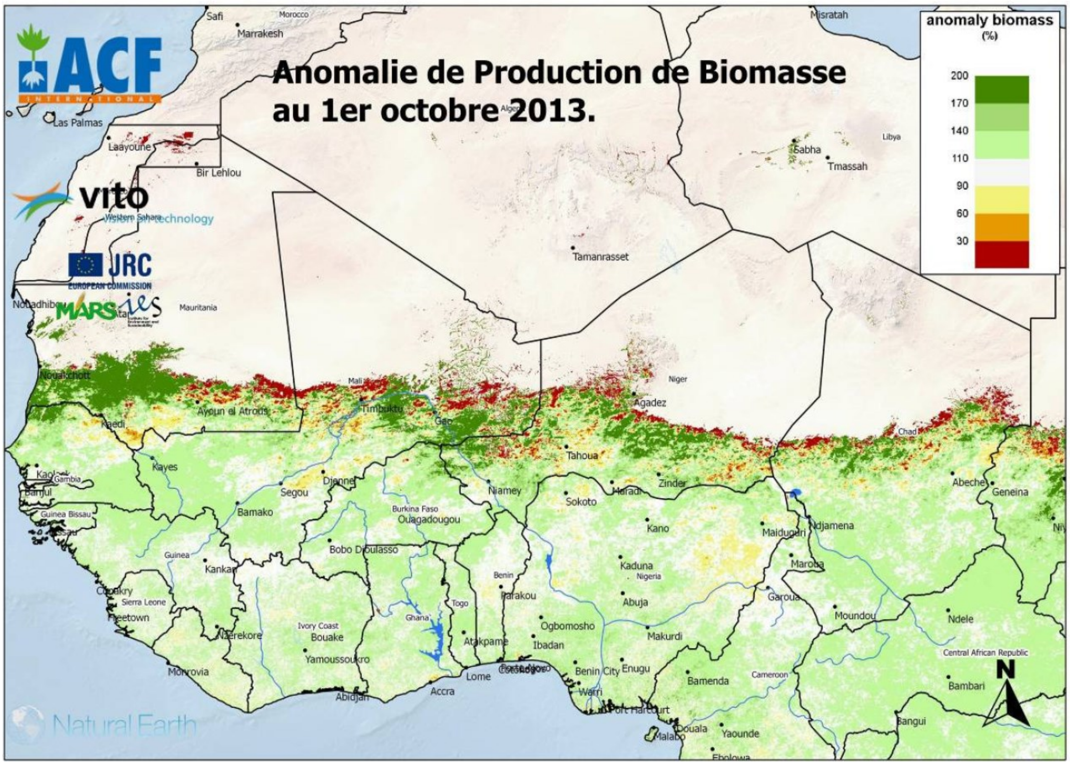
Objective: Within the framework of the monthly meetings of the Regional Food Security and Nutrition Working Group for West Africa, it has been agreed that, in a humanitarian perspective, WFP and FAO provide the group with highlights on the food security situation of the previous month.

2013-2014 Agro-pastoral campaign

Positive harvests perspectives confirmed in West Africa

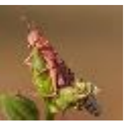
The conclusions from the consultation of the regional information system for Food Crisis Prevention and Management (PREGEC) organized by the Permanent Inter-State Committee for drought control in the Sahel (CILSS) held from the 19th to 22nd November 2013 in Lomé (Togo), and confirmed by the Food Crisis Prevention Network (RPCA) meeting (Abidjan, 25-27 November 2013) indicate that the projected cereal production in the Sahel and West Africa totaled 57,462,000 tons. This estimation is 16% above the average cereal production of the past five years. Cereal production in the Sahel is however estimated at 19,541,000 tons, whis is 1% over the five-year average. The coastal zone recorded a more favorable situation with a total production of 37,921,000 tons.
Rice production estimated at 16,181,000 tons had the largest increase with more than 31% over the five-year average, maize 19%, groundnuts 25%, cassava 24% and the cowpea 11%. In contrast, production of millet decreased by 17 %.

Figure 1: Biomass production anomaly 1st October 2013



Source : ACF

The pastoral situation is generally good with adequate animal health, water points relatively well filled and pasture available. However, pasture deficits are locally observed in Niger, Chad Mauritania, Senegal and Mali (Figure 1). Pasture availability may deteriorate early in these areas before the usual pastoral lean season and cause premature livestock movements and conflicts.



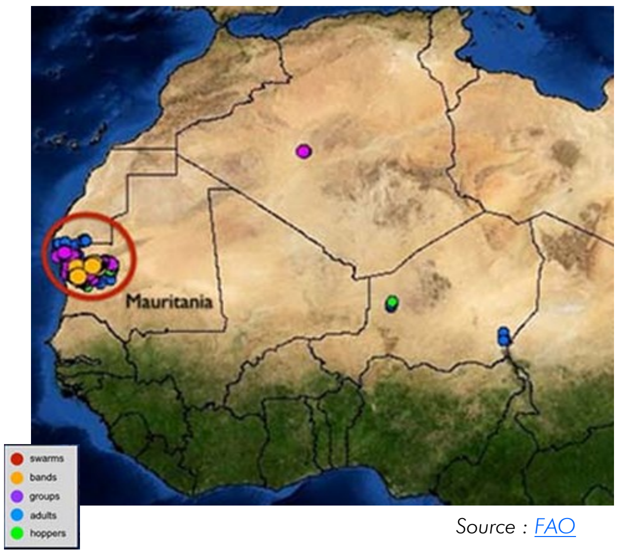
Locust situation as of 3rd December 2013

Outbreak continues in northwest Mauritania

An outbreak continued in northwest Mauritania where ground control operations intensified and treated some 32,000 ha of hopper groups and bands and an increasing number of adult groups. A second generation of breeding will commence in December with egg-laying, hatching and band formation. Consequently, locust numbers will increase further and infestations could expand and extend into adjacent areas of Western Sahara, northern Mauritania and southern Morocco.
Locust numbers declined in the summer breeding areas of the northern Sahel in Mali, Niger and Chad where no significant developments are expected during the forecast period.

[More information on locusts]

Figure 2 : Desert locust situation as of 3 December 2013



Source : FAO

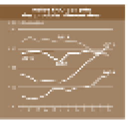
Displacement situation in the region

Constant decline of IDPs in Mali

Mali: The latest numbers indicate that there are currently 283,000 internally displaced people (IDPs) in Mali and 169,291 Malian refugees in neighboring countries (Sources: IOM, HCR). This denotes a decrease of 15% of the total number of displaced people in Mali, which accounts for 50,824 IDPs less than three months ago. IDPs are returning to their home in the north of the country, despite several violent incidents caused by insurgents.
IDPs continue to express their desire to return home. In a survey conducted by IOM / ACTED in October 2013, 84% of IDPs have indicated that they intend to return to their places of origin. Since January, IOM has monitored an estimated 78,012 IDPs moving from the south towards the northern parts of the country. The main reason for the return is the improved security situation for 78% of south-north returnees and economic opportunities for about 50% (OCHA).

Niger: Since mid-May 2013, the south-eastern region of Niger has recorded an inflow of displaced populations from northern Nigeria, fleeing from attacks of the Nigerian army against Islamic activists of the Boko Haram group. According to UNHCR, about 37,000 people have fled the three states of northern Nigeria that are in status of emergency (Borno, Yobe and Adamaoua) and have entered the Diffa region of Niger (as of 7 November). Among them, more than 29,000 people are Nigerien returnees, about 8,000 are refugees from Nigeria and 150 are citizens of other countries. Most of these displaced people are living in host families in Bosso, Abadam, principal Soroa, Diffa, Kablewa, Tchoukoudjani, Garin Amadou and Baroua (ACAPS).

Chad: Chadian migrants in Nigeria continue to return to Chad due to the insecurity caused by clashes between the Nigerian army and Boko Haram in the three neighboring regions. Since May 2013, 3,500 Chadians returned and 553 Nigerians sought refuge in the Lac region. Due to political instability in the Central African Republic (CAR), the total number of refugees is estimated to be 75,451 people. The number of refugees from Sudan amounts to 374,598 people (OCHA).



Trends on international markets

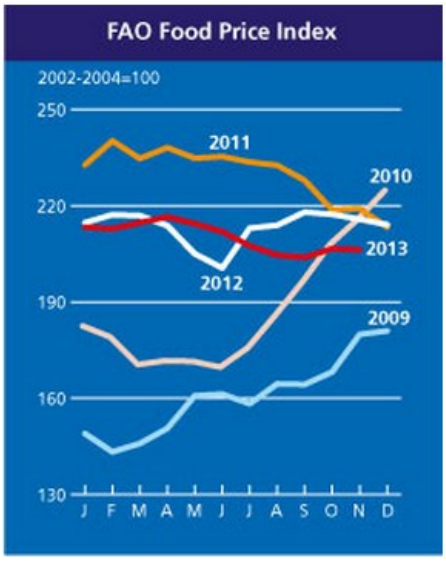
FAO Food Price Index nearly unchanged in November

The FAO Food Price Index averaged 206.3 points in November 2013, almost unchanged from the revised value of 206.6 points in October, but 9.5 points (4.4 percent) below its November 2012 value. A sharp decline in sugar prices last month nearly offset the rise in oils. Cereals averaged slightly lower but meat and dairy values were stable.

The FAO Cereal Price Index averaged 194.2 points in November, down 2 points (1 percent) from October, and as much as 61 points (or 24 percent) below its November 2012 level. A record cereal crop this year has helped to improve the global supply situation, weighing on the international prices of all cereals, including wheat, maize and rice.

In November, **world rice prices** decreased, though the decline was light, thanks to the firmness of Vietnamese prices. In Asia, prices tend to fall on the eve of the arrival of the new harvests to the market. In Vietnam, however, the supply policy to support domestic prices and the sales prospects to China and the Philippines tend to strengthen export prices. In the United States, prices have started to decline after months of stability, while in Mercosur prices remain firm. The world production 2013/2014 will be smaller than expected due to the degradation of harvests in India and China. The world import demand, which should remain stable in 2013, could be higher in 2014 because of recent weather disasters in Southeast Asia. However, since the export supply still is abundant, world prices may not be impacted in the coming months (InterRice Bulletin N°117) .

Figure 3 : FAO Food Price Index– November



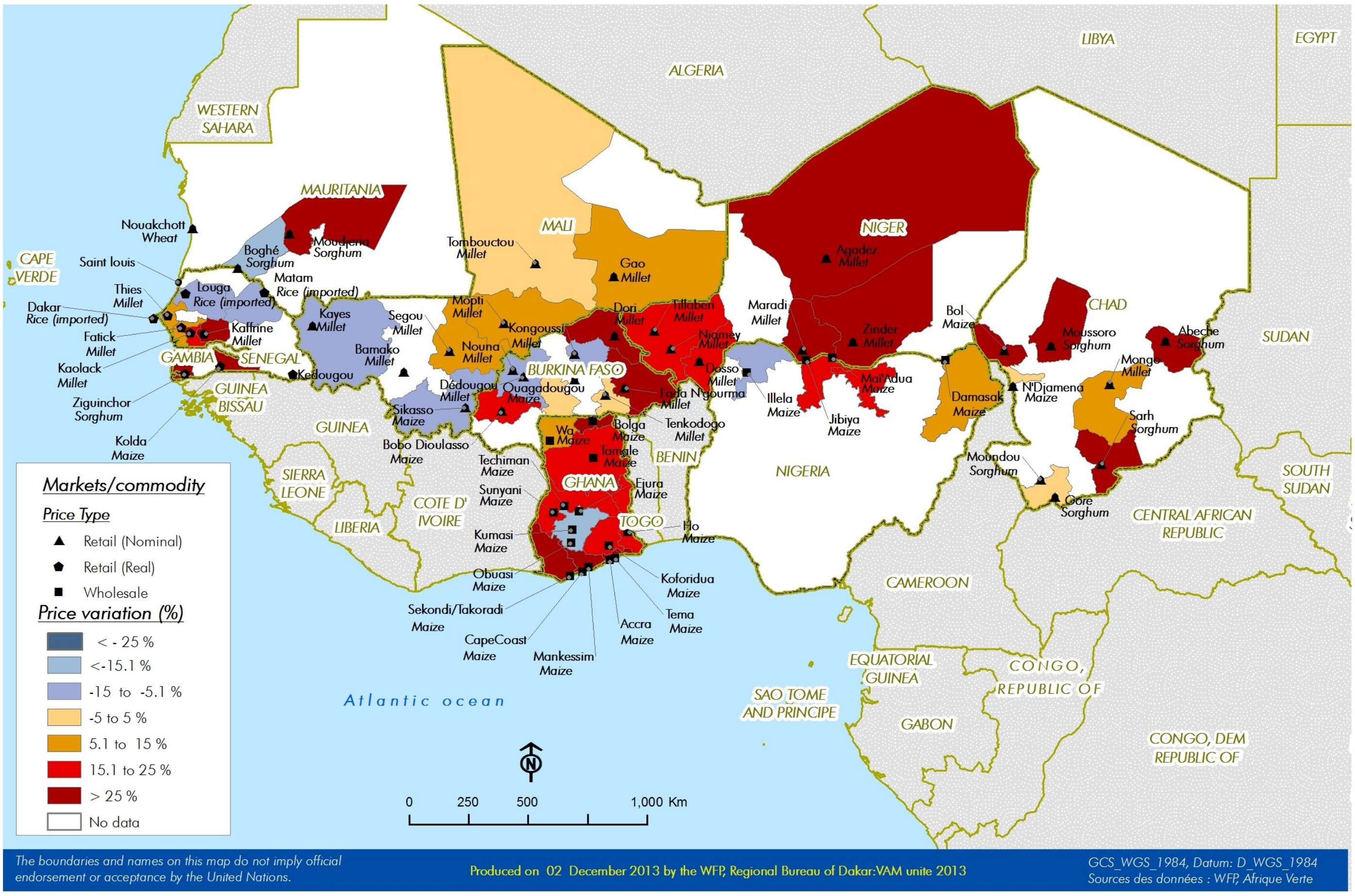
Source : FAO

Trends on West African Markets

Cereal prices higher than their five-year averages in Burkina Faso, Niger, Nigeria and Chad

Overview: Millet and sorghum prices in Burkina Faso, Niger, Nigeria and Chad remain above their five-year averages, raising concerns over regional food security and local procurement opportunities. A strong international supply of rice caused prices of imported rice to fall in Senegal and Mali but allowed other rice markets in the region to remain stable. Cereal harvests are reaching most markets in the Sahel and West Africa Region, yielding normal supply levels and causing a general downward trend in grain prices in the past two months. In Mali, Niger and Burkina Faso, maize prices decreased in most markets, following a continuous seasonal decline of wholesale prices in northern Nigeria border markets.

Figure 4 : Comparison (in percent) of October/November 2013 prices to five-year averages (2008-2013) - millet, maize, sorghum and rice



Source : WFP - VAM, Afrique Verte

Senegal: Large rice imports due to a favorable international market environment for rice caused prices to fall in Dakar (-2%). Overall prices for coarse grains continued to decline or remained stable in October, with the exception of sorghum prices in Ziguinchor (+10%) and millet prices in Dakar (+16%). Price decreases can partly be explained by a drop in demand due to the ongoing harvest and the increased sales of last season's remaining stocks. However, a comparison to the five-year average reveals that local coarse grains remain significantly higher for millet (+33% in Kaffrine, +21% in Kaolack, +14% in Thies), maize (+29% in Kolda, +11% in Fatick) and sorghum (+41% in Ziguinchor, +30% in Fatick) (Source : WFP).

Mauritania: The harvests have started in several rain-fed production areas, causing cereal prices to decline in some markets. Prices for local rice and sorghum declined between 19% and 35%, depending on the market. Even in the region of Guidimaka where a rainfall deficit was observed, local cereal prices remained stable, including on the Ould Yengé market. Markets are generally well-supplied with imported products, allowing prices to remain stable or causing a decrease compared to last year. On average, sugar prices decreased by 13%, while wheat and imported rice prices declined by 5%. Despite a decline observed between October and November 2013, the price of milk remains 14% higher compared to November 2012 (Source : WFP).

Mali: Demand in the south of the country is weak, while local cereal supply at markets increased due to ongoing harvests and the ability of traders and producers to continue to sell their stocks from the last agricultural season. Consequently, some markets saw decreased prices for certain cereals. Compared to the previous month, millet prices fell by 6% in Timbuktu, by 8% in Bamako and by 14% in Ségou markets but remained stable in Mopti and Kayes. Prices for millet increased only in Sikasso (+5%) and in Gao (+11%). The lowest prices for millet have been observed in Ségou markets (16 000 CFA / 100 kg), while Timbuktu markets are still the most expensive (22 500 CFA / 100 kg). Most cereal prices are well below their respective 2012 levels. Compared to the five-year averages

Trends on West African Markets (continued)

Cereal prices higher than their five-year averages in Burkina Faso, Niger, Nigeria and Chad

millet prices are still high in most markets except in Kayes (-11%) and Bamako (-7%). Maize prices decreased or remained stable throughout the country (-3.6% in Bamako, -13% in Sikasso, -7% in Ségou and -6% in Mopti) and increased only in Gao (+6%). Maize prices are below their five-year averages in all markets except for Ségou (+8%). Prices for both local and imported rice dropped significantly in Timbuktu (-29%). Local rice continued to be absent in Gao, while imported rice also dropped notably, falling nearly 31%. Timbuktu still has the lowest price for imported rice (20 000 CFA/ 100 kg), while Mopti had the highest prices (34 000 CFA/100 kg). Observed country-wide price differences are mainly due to the level of supply and household purchasing power (Source: Afrique Verte).

Burkina Faso: Prices remained stable or declined for most cereals throughout the country compared to the previous month, which is explained by the arrival of ongoing harvests in local markets. In Ouagadougou, millet prices decreased by 12%, while prices for local sorghum dropped by 3%. In the eastern region of Kossi, prices dropped for millet (-15%), maize (-4%) and sorghum (-4%), while rice prices remained stable. In the Tenkodogo (Centre-Est), all cereal prices remained stable. The northern region of Dori (Sahel) recorded overall price stability. Only maize prices in the Kongoussi market increased by 6%. Country-wide, a comparison to the five-year average shows that millet prices are generally higher in November 2013 (+40 percent in Dori, +26 percent in Fada), while remaining below their 2012 levels (Source : Afrique Verte).

Niger: As cereal harvests are underway, most grain prices in Niger decreased in October and early November compared to the precedent months. Maize retail prices in particular declined, driven by decreased wholesale prices in northern Nigeria - the region's major production and collection area - in September (-14%) and October (-11%). Prices for imported maize dropped throughout Niger, most significantly in Dosso (-19%), Zinder (-15%), Agadez (-14%) and Maradi (-14%). Reduced harvest prospects in Niger due to the early end of rains in September did not prevent the domestic supply of major local cereals (millet and sorghum) from increasing, as traders are selling off remaining stocks from the 2012/13 agricultural season. Millet prices decreased in the south-western district of Tillabéry (-19%), Dosso (-13%), Agadez (-6%) and Zinder (-4%), while increasing in Niamey (+4%) and Maradi (+18% – following a 30% drop the previous month). However, millet and sorghum prices in all monitored markets in Niger remain far above their five-year averages, except for sorghum prices in Niamey (-1%). Sorghum prices were stable in Zinder and Dosso but in all other monitored markets (Source : Afrique Verte).

Nigeria: Although production trends follow a general seasonal decline, average wholesale prices for millet, maize and sorghum in northern Nigerian wholesale markets at the border to Niger remain significantly higher than their five-year averages (+28%, +11% and +21%, respectively). They are also higher in the same markets compared to the previous year for millet (+6%), but lower for maize (-5%) and sorghum (-1%). Nigeria accounts for half of West Africa's food supply and is a main source for regional trade activities (Source : WFP).

Chad: Millet and sorghum production volumes dropped by 31% and 26%, respectively. In October/November, markets were generally supplied with cereals stocks from last year's agricultural season. Harvests have not yet reached all the markets, which explains erratic fluctuations of cereal prices, most notably of millet. In October, millet prices increased in Sarh (+27%), Abeche (+14%) and Moussoro (+6%) but decreased in Moundou (-7%) and Goré (-12%). Sorghum prices increased significantly in Abeche (+57%) and in N'Djamena (+7%), while dropping in Goré (-39%). Maize prices in N'Djamena dropped by 12% (Source: WFP).

Ghana: Maize wholesale prices fell in October as harvests reached local markets (-31% in Techiman, -9% in Sunyani, - 22% in Tema), although maize prices in southern (+14% in Makessim, + 8% in Sekondi/Takoradi) and northern (+8% in Wa, +5% in Bolga) markets increased. In almost all markets, maize wholesale prices remained significantly above their five year averages, with the exception of the markets in Techiman (-14%) and Ejura (-15%), both of which lie in surplus production regions. Cassava prices fell or remained relatively stable in most markets, except in Techiman, where wholesale prices increased by 36% (Source: WFP).

Liberia: The main rice harvest in the country has begun and the new paddy crop (local rice) is expected to arrive at markets in the coming weeks. The retail price for a 50kg bag of Imported Parboiled rice averaged L$2,857 in October 2013, 0.2% above the September level but still L$414 (13%) below its October 2012 value. The overall decline in prices of imported rice this year in comparison to levels during the same period last year is largely driven by the continued presence of cheap rice imports (low-grade parboiled rice especially from India) as well as the downward trend in global rice prices in recent months. On a month-to-month level, almost all of the markets monitored either reported slightly lower or stable prices for imported parboiled rice between September and October 2013. The Gbarnga market in central Liberia was the lone exception, where a price increase of 7% was recorded. This was likely linked to further depreciation in the local currency against the US dollars in that region (Sources: CILSS-AGRHYMET/FAO/PAM/FEWS NET).

Impact on food security

Situation of localized crises and food stress in the region

In West Africa, the results of the *Cadre Harmonisé* (CH) food and nutrition security analysis, which was conducted in ten countries throughout the region in October and November 2013, shows that multiple zones are in a situation of stressed food security with localized areas facing a food security crisis, despite ongoing harvests. This situation is globally explained by the combined effects of low stocks of poor households, their limited food access, as well as the high prevalence of acute malnutrition.

The PREGEC indicates that decreasing rates of global acute malnutrition were observed in Niger, Burkina Faso, Mali and Chad. However, the situation remains critical in the Sahel region and in West Africa, as surveys conducted between June and August 2013 detected areas with a prevailing nutrition emergency. 3.4 million children under the age of five suffer from moderate acute malnutrition, while 1.1 million are severely malnourished. The nutrition situation is likely to worsen following production decreases in some areas in The Gambia, Mali, Mauritania, Niger, Senegal and Chad.

The Food Crisis Prevention Network (RPCA) confirmed the PREGEC conclusions and according to the Cadre Harmonisé results, 13 million people are food insecure in the Sahel region (Burkina Faso, The Gambia, Niger, Senegal, Mauritania, Cote d'Ivoire and Chad). The need for structural policies and response plans for populations in food and nutrition insecurity as well the urgent need to rebuild countries' national food stocks were identified as priorities.

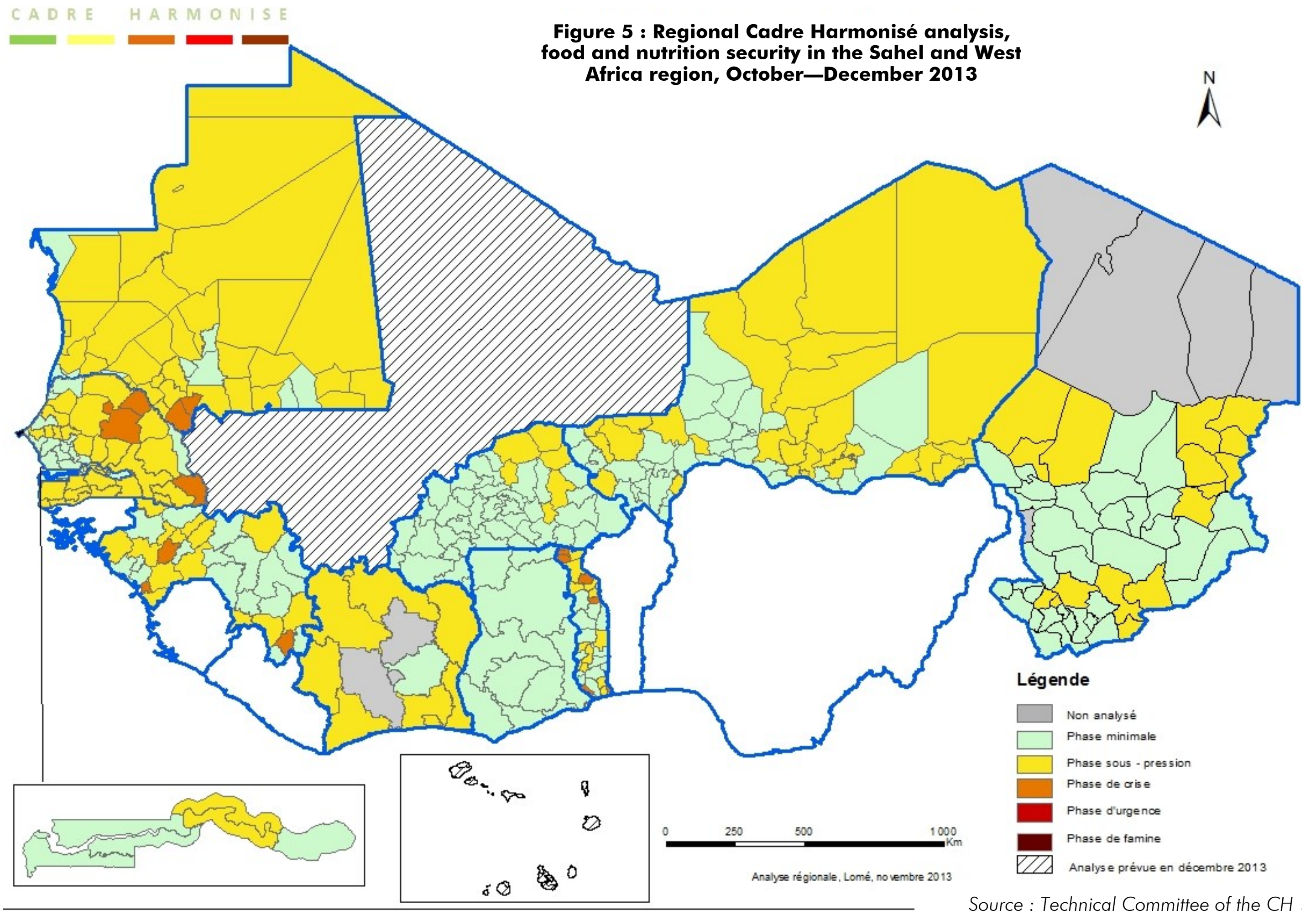


Figure 5 : Regional Cadre Harmonisé analysis, food and nutrition security in the Sahel and West Africa region, October—December 2013

Source : Technical Committee of the CH

In Côte d'Ivoire, the ministry of agriculture, WFP, FAO and the National Institute of Statistics conducted a household food security assessment in humanitarian priority zones of the country. This assessment was carried out in October 2013, a period marked by the harvesting of primary food crops. The rate of global food insecurity (moderate and severe) is up to 20 % in the Montagnes district and 18 % in the Savanes district. Severe food insecurity is more prevalent in the Montagnes district, where 3% of the households are concerned, as compared to 0.3% in the Savanes district. This difference may be explained by the fact that data was collected at two different periods, during the lean season in the Montagnes district and during harvests in the Savanes district. The households in severe food insecurity are mainly in zones that were pre-identified to be at risk. The zones in Montagnes district marked a strong presence of returnees, repatriated populations and IDPs, while zones in the Savanes district experienced rainfall shocks.

Impact on food security (continued)

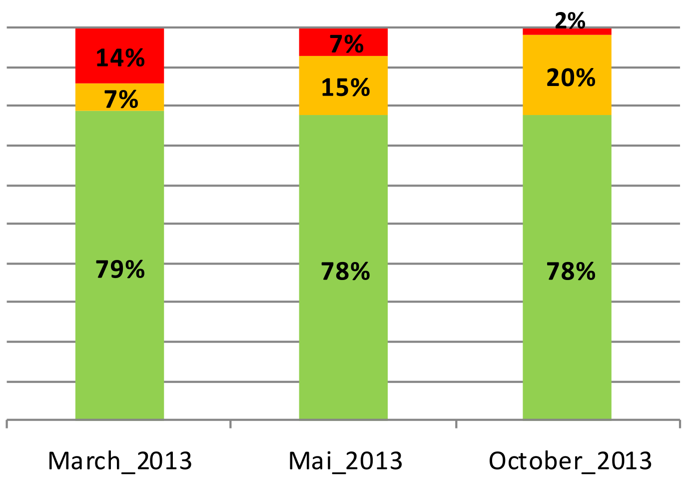
Situation of localized crises and food stress in the region

In Mauritania, a WFP monitoring survey conducted in October 2013, containing a sample of 397 Malian refugee households in M'bera camp, indicates a continuous improvement of the food security situation compared to early 2013. The food consumption score analysis indicates that 22% of households are food insecure, of which 2% are severely food insecure. Severely food insecure households consume only cereals, sugar and oil. It is important to note that the share of severely food insecurity households decreased from 14% in March 2013 to 2% in October 2013. However, global food insecurity is still affecting almost the same proportion since the beginning of the year. Food insecurity affects households which are structurally vulnerable and for which current food assistance is not sufficient for them to exit their situation.
The results of the SMART-SENS survey, which was done twenty days before the WFP monitoring survey, shows a slight improvement of the nutrition situation. The global acute malnutrition rate equals 12% compared to 13% in January 2013. Since last year, efforts of humanitarian actors to improve their assistance have resulted in a decline of food insecurity and malnutrition in the camp.

At a national level, the results of the SMART survey conducted in July 2013 show a global acute malnutrition rate of 13%. The severe acute malnutrition rate has slightly increased, rising from 1.7% in July 2012 to 2.3% in July 2013. The results by region show that the nutrition situation varied from a "precarious" situation to a "critical" one, except in Nouadhibou and in the North. The regions of Wilayas du Tagant, Brakna, Hodh Gharbi, Gorgol, Guidimakha and Assaba are in a "critical" nutrition situation with a prevailing global acute malnutrition rate above the 15% emergency threshold. The regions of Nouadhibou and the North present an acceptable nutrition situation with GAM rates below 5%. The chronic malnutrition rate observed across the country amounts to 20 %, with disparities observed across zones that were defined for the survey.
According to WHO classification, a "serious" situation prevails in the Hodh El Chargui and Tagant regions, with rates between 30% and 40%. The Nouakchott, Nord, Nouadhibou and Trarza regions are in an "acceptable" situation with rates below 20%. The prevalence of chronic malnutrition has decreased from 23.4% in July 2012 to 20.6% in July 2013.

In Burkina Faso, according to a SMART survey carried out in October 2013, the prevalence of global acute malnutrition is 8.2%, which includes 1.7% in a severe form. Across the regions, the prevalence of global acute malnutrition varies from 5.5% in the Central East to 9.8 % in the South West.

Figure 6 : Evolution of household food security in M'bera refugee camp



Source : WFP - VAM

Mark your calendars !

→ 4 February: Launch of the 2014- 2016 Sahel Humanitarian Plan

@ Information on food security in West Africa

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