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Food security and humanitarian implications in West Africa and the Sahel

July 2012

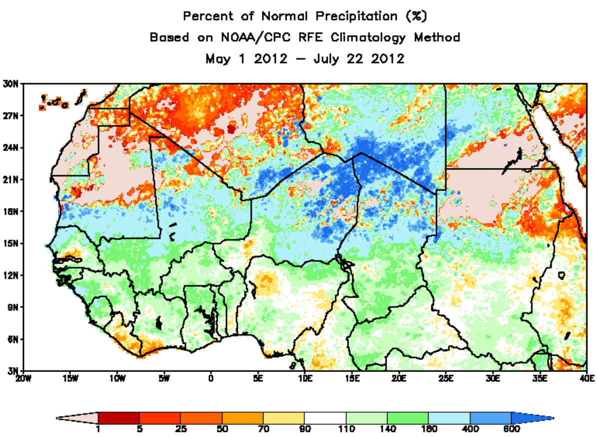
Key points

- Normal start to the 2012-2013 growing season
- Desert locust threat in the Sahel
- Situation in Mali : 175 000 IDPs, 250 000 refugees and a lack of information in northern Mali
- International and regional markets : rise in international maize and wheat prices; stability of grain prices -though still at high levels- in West Africa

Normal start to the 2012-2013 growing season

According to AGRHYMET, seasonal rains were widespread in all the Sahel countries, resulting in rising water levels of major rivers, the development of planting activities, and growing availability of grazing land. Center and eastern Senegal, southern Mali, Niger, Chad and Burkina Faso received between 50 to 100 mm of rainfall. These precipitations caused flooding in Jos (center Nigeria), killed 35 people and damaged or destroyed 200 houses (Nigeria Red Cross). Precipitation levels are slightly above average in all rainfall stations in the Sahel except in some places in center Senegal, south-western Niger and center-north-western Nigeria (figure 1).

Figure 1 : Percent of normal precipitation (May 1—July 22, 2012)

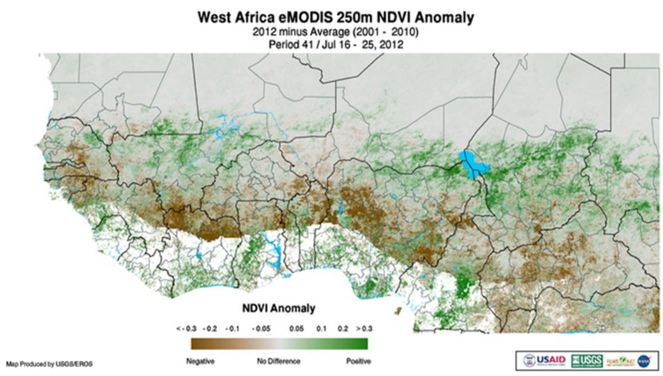


Sources : US National Oceanic and Atmospheric Administration (NOAA)

Planting activities are continuing normally in Mali, Burkina Faso, Niger and Chad with the onset of the rainy season. However, planting activities have been delayed in south-eastern Senegal, in southern Mopti (Mali), in Tahoua and in Dosso (Niger) and in northern Chad (AGRHYMET). However, it is still too early to forecast reliable results for the 2012 growing season.

The pastoral situation improved with the onset of the rainy season, the regeneration of grazing land and the gradual filling of water points. In the eastern Sahel, center Mali and northern Burkina Faso, vegetation continues to grow. However, vegetation growth is delayed in south-western Niger (in Dosso and Say/Tillaberi), southern Burkina Faso and in the border area between Senegal and Guinea Bissau (figure 2).

Figure 2 : West Africa NDVI anomaly: 2012 minus average 2001-2010 (period July 16-25 2012)



Sources: MODIS/USAID

__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. This document describes key elements developped during this meeting.

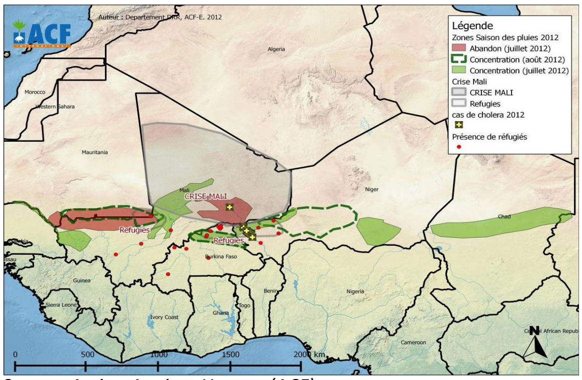
Normal start to the 2012-2013 growing season (continued)

A recent analysis conducted by Action Against Hunger (ACF) in June 2012 indicates pockets of high vulnerability at the Mauritanian-Malian border. This situation is the result of the combination of a poor 2011 rainy season and the likely late onset of the 2012 rainy season.

Most of the Sahel areas experienced a poor 2011 rainy season and the early or delayed onset of the 2012 rainy season will determine the survival of livestock.

In July, a deficit in vegetation development was reported in south-western Niger and in eastern Mali but an improvement was observed in northern Burkina Faso and in south-eastern Mauritania .

Figure 3: Patoral situation in the Sahel (July – September 2012)



Source: Action Against Hunger (ACF)

Desert locust threat in the Sahel

The locust infestation from Algeria and Libya to Mali and Niger is finished, though the desert locust situation remains serious in the Sahel.

In northern Niger, egg laying has been occuring early July. Most egg layings –observed by survey operations- occured in the south-east of the Air Mountains, in the grazing areas between Agadez and Tanout and in the southern Tamesna Plains (close to Tassara). Mature adult groups were reported in the Tamesna between In Gall and Tegguidda and in the south-east Air Mountains. Hatching occured in some places between Tassara and Tanout where hoppers have been observed. Additional survey operations will be carried out in center and nothern Niger.

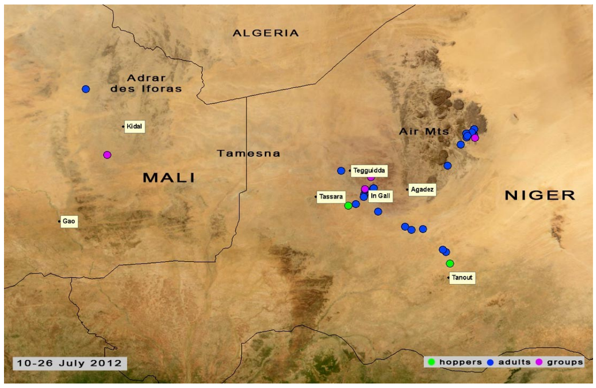
In northern Mali, similar situations and developments are expected, but due to insecurity, information is scarce. Nevertheless, survey operations could soon be undertaken. Until July 26, groups of adults have been observed between Gao and Kidal and maturing adults have been found in Tilemsi (western Adrar des Iforas). In center Mali, northern Segou and eastern Mopti, survey operations are ongoing but no locusts were reported.

In Chad, survey operations are ongoing in Kanem and between Abeche and Adre where a limited number of locusts has been observed.
In southern Mauritania, survey operations are ongoing in the summer breeding areas of the country. So far, a limited number of adults has been observed and is currently laying eggs in Nema.

FAO alerted countries concerned by this desert locust threat and an action plan has been implemented for 2 months (July and August 2012) during the last meeting of the Locust Control Operation Committee. This plan requires the use of pesticide stocks in neighboring countries. Pesticide air-lifting towards affected countries, is currently under preparation in collaboration with WFP. Assistance is still needed to maintain control of operations in Mali and Niger and, to a lesser extent, in Chad.

Agricultural crop production and food and nutrition security of some 50 million people are threatened by desert locust infestations, the most serious since 2005.

Figure 4: Locust situation– 26 July 2012



Source: FAO

More info on FAO website:
www.fao.org/ag/locusts/fr/info/info/index.html
www.fao.org/ag/locusts/fr/info/2002/index.html

Situation in Mali : 175 000 IDPs, 250 000 refugees and a lack of information in northern Mali

As of 16 July, there are currently 175,970 IDPs* in Mali and 248 935 refugees in the neighboring countries (Burkina Faso, Mauritania, Niger and Algeria).

The situation in northern Mali remains volatile. Precarious calm reigned over Gao after islamist groups took control of the town in violent confrontations with MNLA on 26 and 27 June. 35 people, including civilians, were killed and over 40 injured during the fighting.

*according to the latest figure provided by the Protection Cluster/Mali

The joint WFP/Early Warning System (SAP) Emergency Food Security Assessment (focusing on IDP households, host households and households living in areas with high concentration of IDPs) is currently underway in the eight regions of Mali. Data is being collected by different partners (SAP, World Vision, CARE, Africare, Handicap International and Oxfam) who were trained by WFP. This assessment should make up for the lack of information on IDPs. This data will be the most comprehensive collected in northern Mali since the outbreak of the conflict.

Preliminary results should be available by the end of August-early September.

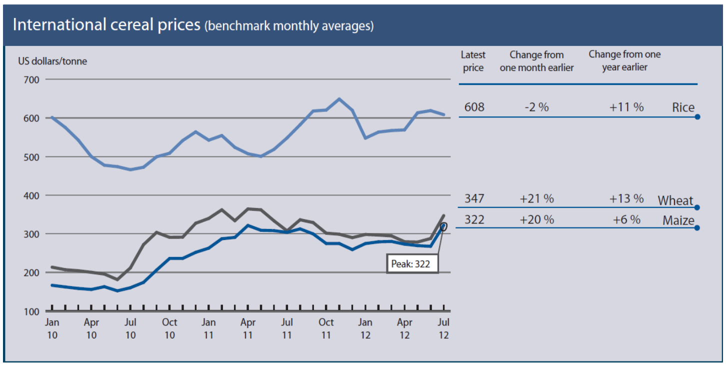
International and regional markets : rise in international maize and wheat prices; stability of grain prices -though still at high levels- in West Africa

Export prices of **maize** increased by 20 percent in the first three weeks of July compared to their June level. The benchmark US maize price (Yellow, No.2, f.o.b.) averaged USD 322 per tonne reaching a new record high. Prices were underpinned by continuous concerns about the impact of hot and dry weather conditions on yield potential of the 2012 maize crop in parts of the United States. The downward revision of the US official 2012 maize production forecast on 11 July provided further support.

International prices of **wheat** rose by some 21 percent in the first three weeks of July. The benchmark US wheat price (No.2 hard Red Winter, f.o.b.) averaged USD 347 per tonne, 13 percent higher than in July 2011 but still well below the record level of March 2008. Deterioration of prospects for the 2012 wheat production in the Black Sea region due to dry and hot weather, particularly in the Russian Federation, as well as strong maize values have put upward pressure on wheat prices since the second half of June. Estimates pointing to reduced plantings of the 2012 spring wheat crop in the United States contributed to the increase.

The benchmark Thai **rice** export price (Thai white rice 100% B) decreased marginally in the first weeks of July and averaged USD 608 per tonne, 11 percent higher than in July 2011.

Figure 5: International cereal prices



Source : FAO/GIEWS

The international rise in maize and wheat prices will likely have an impact on import-dependent countries in the region. Mauritania may be particularly affected due to its large dependence on wheat imports.
A close monitoring of the situation will be necessary to assess the potential impact of the international rise of grain prices on regional markets.

In Togo, the preliminary results of a market survey conducted by WFP indicate a good grain availability, especially of maize. This availability is higher than in 2011 at the same period, and stocks are held by producers, traders and the State (ANSAT– Agence Nationale de la Sécurité Alimentaire du Togo).

Compared to last year, maize decreased in Cinkasse (Burkina Faso border), Dapaong (close to Cinkasse) and Kara/Ketao (Benin border) by 9%, 10% and 17% respectively. Cinkasse and Dapaong are more integrated to Burkina Faso market than Kara/Ketao (related to Lome). For **wholesalers**, sales are up 10% to 50% in volume compared to last year due to a higher demand and a good harvest. For **retailers**, sales are down 10% to 50% compared to a year ago.

According to traders, consumer demand in maize remains low compared to 2011 due to household stocks and the excepional availability of maize. Household food consumption and income are mainly provided from the latest harvest stocks. Support for the current growing season is primary household priority.

The mission recommends **regulating the national stocks** before the next harvest.
The preliminary results of a similar market survey conducted **in Benin** indicate a high pressure on grain amounts available (commercial, institutional and domestic demand), a low level of stocks compared to 2011 and rises by 10% to 20% compared to 2011 (local collection and border markets in Nikki, Parakou and Malanville). In Karimama (very isolated local market), maize increased by 100% compared to 2011. Most supplies came from traders stocks.

Cross border flows towards Niger intensified in 2012 but have slowed down since April due to price increases in Benin. This increase in trade is mainly due to the Sahel crisis.

The combination of different factors (institutional demand, the Sahel demand, Nigeria demand, low production and domestic demand) contributed to the rise in food prices. In northern drought affected areas, households are more affected by price increases. Households rely on market for most of their food consumption. The purchase power of low-income households (daily workers, shepherds, craftsmen, fishermen) and their food security further deteriorated.

To avoid further tensions on markets, the mission recommends that local purchases should not be undertaken before the next harvest.

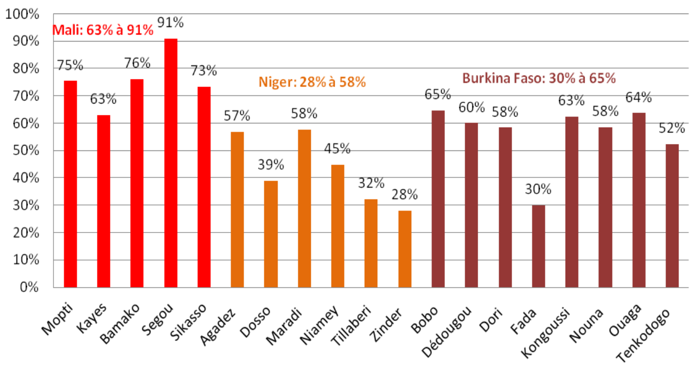
Cinkassé /Togo, market at the border: grain carried into Burkina Faso

International and regional markets : rise in international maize and wheat prices; stability of grain prices -though still at high levels- in West Africa (continued)

Compared to June, grain prices remained stable overall - but at high levels- in Burkina Faso, Niger and Mali (south and center). Mitigating actions undertaken by the States and other food security actors (food distribution, grain prices exemption, etc.) have supported price stability during this lean season.

In Niger, compared to June 2012, millet and sorghum increased by 7% in Agadez and Niamey, respectively, while maize increased by 5% in Dosso. According to Afrique Verte, the highest grain prices were observed in Agadez followed by Niamey, Zinder, Maradi and Dosso. Compared to July 2011, millet prices increased by 43 % to 93% in Niger with the most significant rise in Maradi. Compared to the 5-year average, significant increases in millet prices were also observed in Maradi (+58%) (figure 6).

Figure 6 : millet prices in Burkina Faso, Mali and Niger (1)



Source: FAO/GIEWS

(1): For Burkina and Mali, this is compared to the 4-year average, and for Niger, this is compared to the 5-year average.

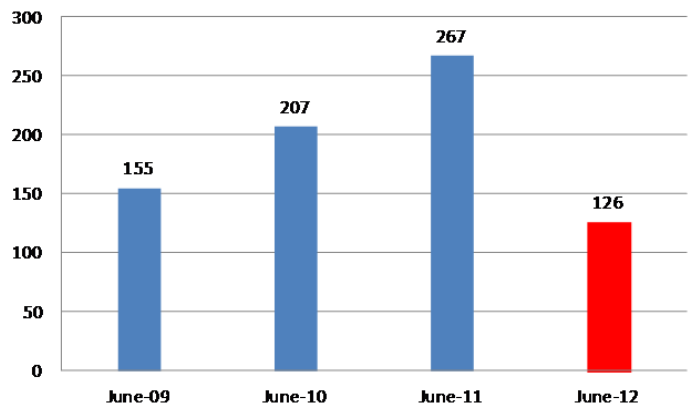
In Bobo (Burkina Faso), compared to June 2012, sorghum and maize increased by 7% and 9%, respectively, while millet increased by 8% in Koungoussi (Afrique Verte). In Burkina Faso, compared to July 2011, millet prices increased by 39% to 90% with the most significant rise in Bobo. Compared to the 4-year average, millet prices increased by 30% to 65%, with the most significant rise also observed in Bobo (figure 6).

In Mali (center and south), millet and sorghum increased by 4% in Mopti compared to June 2012, while maize increased by 5% in Bamako (Afrique Verte). Compared to July 2011, millet prices increased by 68% to 108% in Mali (centre and south) with the most significant rise in Segou. Compared to the 4-year average, millet prices increased by 63% to 91% with the most significant rise also observed in Segou (figure 6).

In June 2012, terms of trade deteriorated in Bandiagara by 53% for sheep/millet compared to a year ago. In June 2012, in Bandiagara, a herder selling a sheep could obtain 126 kg of millet as compared to 267 kg a year ago (figure 7). These terms of trade remain unfavourable compared to the 3-year average (-39%). This deterioration is mostly due to the continuous rise of millet prices in Bandiagara and poor physical health of livestock.

In Niger, the terms of trade for goat/millet and onion/millet further deteriorated for households selling a goat in Abalak or a bag of onions in Agadez. In Abalak, a household will obtain 52 kg of millet by selling a goat as compared to 110 kg a month ago. In Abalak, these terms of trade remain unfavourable for herders compared to the 5-year average (-34%). In Agadez, a producer selling a 100 kg bag of onions could obtain 105 kg of millet in June 2012 as compared to 140 kg last year at the same period. In Agadez, these terms of trade remain unfavourable for onion producers compared to the 5-year average (-17%).

Figure 7 : Terms of trade sheep/millet in Bandiagara (Mali)



Sources : OMA/DNPIA

Impact on food security

In Chad, the preliminary results of a household food security assessment indicate that in June 2012, 1.8 million people were food insecure, including 943,300 who were severely food insecure. Food insecurity is worst in the regions of Bahr El-Ghazal, Guera, Sila, Kanem and Batha. Household needs and priorities are: food, agricultural inputs, access to credit, and income generating activities. Community needs and priorities are: access to water, health, education, and agricultural inputs.

In Mali, high vulnerability pockets will appear in the neighbourhood of Malian refugee camps in Mauritania, Niger and Burkina Faso. The pastoral situation in northern Mali (affected by political crisis combined with rainfall deficits) will remain highly vulnerable.

A press conference organized by FEBEVIM (Fédération Nationale Groupement inter-professionel de la Filière Bétail Viande au Mali) will take place on August 9 at 'La Maison de la Presse' in Bamako. This conference will be held to raise public awareness of the herders' situation in northern Mali and the fact that pastoralism is not sufficiently taken into account in emergency responses.

Recommendations for the regional food security and nutrition working group

Closely monitor the prices of wheat and maize on the US market	Better understand the impact on the Sahel countries and especially on import-dependent countries
Strengthen information sharing on the situation in northern Mali	Fill the data gap on the food security of households at risk
Support the regional programme to combat locust infestations and strengthen national plans (Mali, Mauritania, Niger, Chad)	Increase efficiency of locust control operations (monitoring, control, logistic, equipment)
Urgently support livestock activities and fund 2012-2013 off-season activities	Compensate for the weak response to the agricultural sector by supporting livestock activities as well as activities during the 2012-2013 off-season

Conclusions

- **The lean season is continuing in the Sahel and response actions are ongoing. The pastoral situation is improving due to the regeneration of the vegetation, but the terms of trade for livestock/grain remain unfavourable to herders.**
- **Grain prices remain high in the Sahel, especially in the Central Basin, which results in limited access to food for the most vulnerable households.**
- **Agricultural crop production and food and nutrition security of some 50 million people are threatened by desert locust infestations, the most serious since 2005.**

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