FOOD SECURITY AND HUMANITARIAN IMPLICATIONS IN WEST AFRICA AND THE SAHEL

November 2012

Key points

- ∇ **Good crop prospects confirmed by PREGEC**
- ∇ **Locust situation remains of concern**
- ∇ **Grain prices in West Africa and on the international market: millet prices remain high but other coarse grain prices are normalizing in West Africa**
- ∇ **Households whose livelihoods remain affected by the 2011-2012 crisis might face food difficulties in 2013**

Growing season and assessment of crops

The regional meeting on the agriculture and food security outlook in West Africa and the Sahel (PREGEC), organized by the Permanent Inter-State Committee for the Fight against Drought in the Sahel (CILSS) from 19 to 21 November 2012 in Niamey (Niger), indicates that provisional cereal production in the Sahel and West Africa (1) amounts to 57.4 million tonnes - including 13.7 of rice, 17.9 of maize, 11.1 of millet and 14.3 of sorghum - for the 2012/2013 growing season. This production increased by 13% compared to last year and by 18% compared to the 5-year average.

For CILSS member countries, cereal production (except in Burkina Faso) is estimated at 17.5 million tonnes (up by 37% and 35% compared to last year and the 5-year average, respectively). In countries in the Gulf of Guinea, cassava and yam productions are estimated at 76.3 million tonnes and 53 million tonnes, respectively (up by 2% for yam and down by 3% for cassava compared to 2011/2012).

In Chad, the preliminary results of the joint mission (CILSS/FAO/FEWS NET/CE-JRC/Government) estimate that 2012/2013 cereal production is 3.8 million tonnes. This is a significant increase (by 130%) compared to the 2011/2012 growing season (1.7 million tonnes) and to the 5-year average (by 86%). This performance results from the 2011-2012 low production and drought of the Sahel zone which registers a record production level (up by 226% compared to last year) of 3 million tonnes (versus 0.9 million last year). By contrast, the Sudanian zone registers a 5% increase in the cereal production, which is estimated at 757,545 tonnes versus 722,941 tonnes last year.

In Niger, the preliminary results of the joint mission (CILSS/FAO/FEWS NET/WFP/Government) indicate that the 2012 cereal rainfed production is estimated at 5.1 million tonnes (up by 22% compared to the 5-year average and by 43% compared to 2011 production). This is due to the good preparation for the growing season (availability of subsidized inputs such as improved seed varieties and fertilizers).

In Mali, the 2012-2013 gross cereal production is estimated at 6.2 millions tonnes, including 2 million of rice and 1.4 million of maize. This production increased by 7% compared to last year (estimated at 5.8 millions tonnes). Rice production increased by 16% compared to last year (from 1.7 million tonnes last year to 2 million tonnes this year) and by 41.35% compared to the 5-year average.

Regarding the pastoral situation, land pastures are abundant and water points are well filled in all countries. The animal health situation is satisfactory despite some cases of bovine contagious pleuropneumonia and sheep and goat plague.

In Niger, fodder production should show a surplus even though certain areas deserve special attention. The herds are in good physical health. Given the rainfalls registered, water availability is good in permanent or semi-permanent ponds, lakes and rivers (Komadougou, Niger and its tributaries).

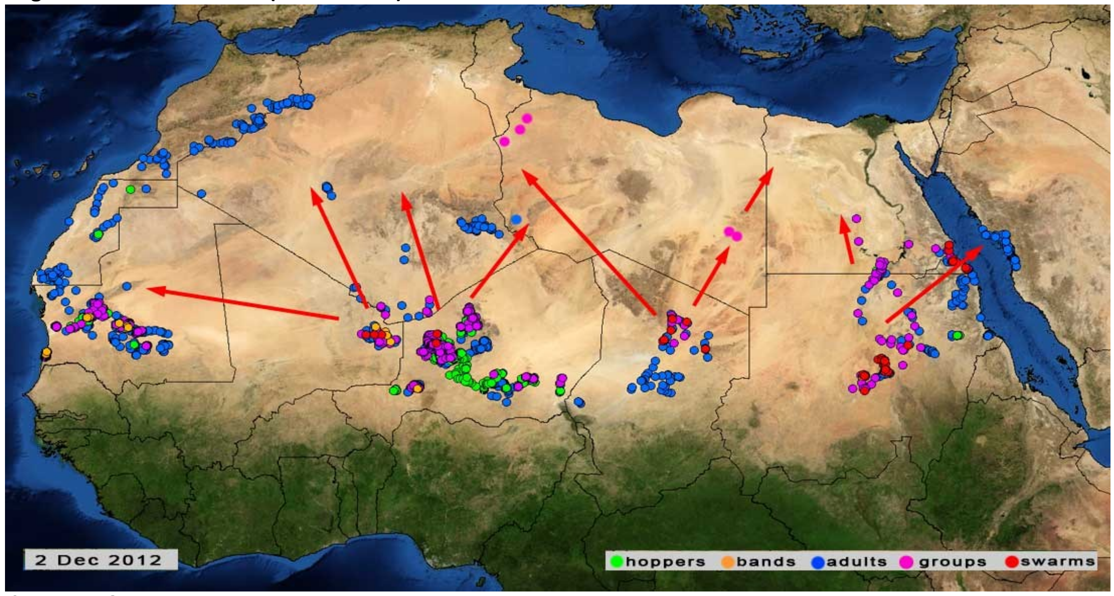
(1): these figures do not take Burkina Faso estimations into account

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 developed during this meeting.*

Serious desert locust threat expands

The desert locust situation remains serious as small swarms continue to form in Mali, Niger and Chad, and adult groups have moved north to Libya, Tunisia and Algeria. Locusts formed groups and small hopper bands in western Mauritania. More groups and small swarms are likely to form in the Sahel during December and move to northwest Africa and northwest Mauritania.

Figure 1: Locust situation (2 December)



Source : FAO

Aerial control operations commenced in Niger. Ground control operations were also undertaken in Mauritania and in Chad. All efforts are required to monitor the situation and undertake the necessary control operations.

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

Floods in West Africa and resulting impacts

A joint mission (United Nations, Government and NGO) has been conducted (from 17 to 22 September) in Borgou/Alibori (Benin) to assess the damages caused by floods. In Karimama, 34,460 acres out of 56,000 acres (62%) have been washed away by floods, and crops have been totally destroyed. These losses, estimated at more than half of the expected harvests in a deficit production area, are putting flood-affected populations at a high risk of food insecurity. In Malanville, 23,940 acres of food crops out of 47,420 acres (50%) have been destroyed.

According to OCHA, in Diffa (Niger) in early November, the Komadougou river continued to rise. More than 2,220 acres of crops have been flooded: 1,662 pepper fields and 937 rice fields have been flooded. The Niger River continues to swell, and two sites in Séno have been identified to provide shelter for people from flooded areas around Niamey.

In Nigeria, according to the joint assessment (United Nations, Government, National Emergency Management Agency [NEMA], State Emergency Management Agency [SEMA], Universities) conducted from 19 October to 2 November, rice out of the major food crops was the mostly affected of the major food crops, followed by cassava and maize. The food security situation is threatened particularly in areas where floods washed away the farmlands, irrigation infrastructure and bridges connecting production areas.
Because the country depends on imported rice, the impact of the flooding on food availability may not be felt immediately. However, most rice production areas have been washed away by the floods and might impact the incomes of concerned producers.
Though some price peaks were recorded, it is still too early to assess the impact of the flooding on the food price index.

Major flooding has occurred in Northern states already affected by high malnutrition rates. In these areas, vulnerable households could be affected by food access issues and by greater risk of malnutrition.

NEMA estimates that 7.7 million are affected by the flooding throughout the country.

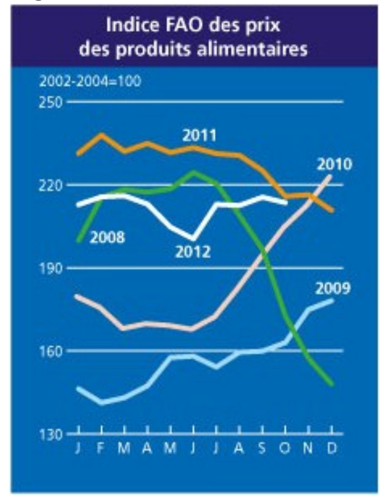
Trends on the international markets

The FAO Food Price Index averaged 213 points in October 2012, down 2 points (1%) from September. The decline is largely due to reduced international prices of cereals and oils/fats which more than offset increases in sugar and dairy prices, while meat values remained unchanged. Food prices averaged 8 % lower during the first ten months of this year compared to the same period last year.

The FAO Cereal Price Index averaged 259 points in October, down 3 points (1.2%) from September mostly because of slightly lower wheat and maize prices. The small decline in wheat prices reflects reduced trade activity, while maize values were down mostly due to slowing demand from the livestock and industrial sectors. Rice prices were mostly stable. Compared to October 2011, the FAO Cereal Price Index is 12% higher, mostly on a 16 % increase in wheat and coarse grains, while rice prices were down by almost 4%. The cereal price index is still 15 points (5.4%) below its peak of 274 points registered in April 2008.

In October, world prices remained stable (with a slight decrease of 1% between September and October) and should remain as such in the following months, unless significant changes take place in Thailand's internal price policy. The Asian harvests have started and seem to be good. The main exporters' stocks have increased and the export supply will be largely sufficient to meet world demand, expected to be steady in 2013 (Osiriz bulletin-n° 104).

Figure 2 : FAO Price Index

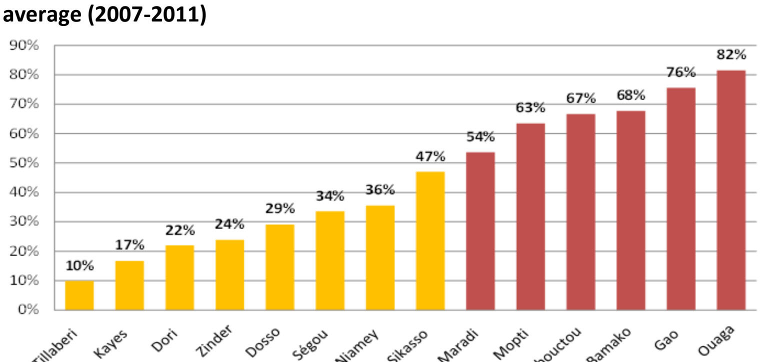


Source : FAO

Trends in West African markets: millet prices remain high, other grain prices normalizing

In November 2012, seasonal decreases in coarse grain prices were observed in West Africa, but prices still remain at high levels compared to last year or the 5-year average. Figure 3 shows that millet prices remain high, especially in Mali (details on page 4).

Figure 3: Millet price trend (November 2012) compared to the 5-year average (2007-2011)



Source : FAO/GIEWS/Afrique Verte

In Niger, according to *Afrique Verte*, although coarse grain prices experienced seasonal decreases, significant increases have been observed in Maradi for millet (+29%) and sorghum (+11%) compared to October 2012. These increases are due to the scarcity of these products on markets, which is caused by the drastic reduction of imports from Nigeria and the low availability of local products on markets. Compared to the 5-year average, coarse grain prices increased for millet (by 10% to 54%), sorghum (by 11% to 39%) and maize (by 12% to 25%). **In Burkina Faso**, grain decreases were caused by better availability on markets in November (*Afrique Verte*). However, compared to the 5-year average, millet, sorghum and maize prices remain high: prices increased by 13% to 82%, by 9% to 36% and by 9% to 27% respectively.

In Senegal, compared to the 5-year average, millet and maize prices remain high: prices increased by 11% to 44% and by 14% to 44%, respectively. In Chad, compared to the 5-year average, millet and sorghum prices remain high and also increased by 13% to 37% and by 8% to 46%, respectively, with an exceptional decrease in Mongo (-21%).

In September 2012, prices of imported rice remained relatively stable **in Liberia** between August and September in most of the domestic markets across the country, with the exception of Pleebo, which has a low degree of integration with other Liberian markets as a result of bad roads which worsen during the rainy season. Pleebo reported an increase of 14%, the most significant in the country. Rural markets continued to report relatively higher prices compared to markets around Monrovia. The most expensive markets were Tubmanburg (14%), Pleebo (13%) and Voinjama (10%), higher than prices in Monrovia (between August and September 2012). Overall, however, markets are well supplied in imported rice however. Current harvest of rice in the south eastern region has not yet reached the markets where imported rice dominates.

These increases affected the purchasing power and food access of the poorest households who rely on markets for their food.

Trends in West African markets : millet prices remain high, other grain prices normalizing (continued)

In October 2012, the terms of trade improved for herders in West Africa. In Abalak/Tahoua (Niger), a herder could obtain 115 kg of millet by selling a goat in October, compared to 98 kg a month ago (Albichir, n°36). In Bandiagara (Mali), a herder could obtain 214 kg of millet in October, compared to 137 kg in September. Howerver, these terms of trade remain unfavourable to herders in Bandiagara (-23%) compared to the 3-year average.

Mali : Millet prices remain high but other grain prices are normalizing

The market for sorghum seems to have normalized in Sikasso, Bamako and Tombouctou but not yet in Segou, Mopti and Kayes (table 1). Millet prices remain high on both surplus and deficit markets and food access is likely to remain an issue for millet-dependent populations. Prices will probably remain above average into the next annual crop cycle. The market for local and imported rice seems to have normalized (with the exception of Tombouctou where imported rice price remains high) and for maize as well. However, further monitoring of the price trends is recommended.

Table 1: Nominal price levels compared to average (2007-2011), as of November 2012

	Bamako	Gao	Kayes	Ségou	Sikasso	Tombouctou	Mopti
Millet	68%	76%	17%	34%	47%	67%	63%
Sorghum	8%	65%	29%	48%	-6%	6%	70%
Local rice	4%		15%	-1%	4%	9%	9%
Imported rice	9%	4%	-3%	1%	5%	1%	12%

Source: FAO/GIEWS/Afrique Verte data

Local coarse grain purchases are competitive in Mali:
A recent analysis shows that cash and voucher transfers are cost-efficient compared to in-kind assistance in Southern Mali. Results indicate that as of November, cash is 20 to 40% cheaper than in-kind food assistance in Segou, and 10 to 20% cheaper in Kayes and Mopti.

Impact on food security and nutrition

In **Burkina Faso**, Save the Children has undertaken a theoretical analysis - based on the assumption that cereal prices alone would have changed compared to the reference year - indicating that the impact of the current increases of staple cereal (by 21 to 116% for sorghum, compared to the reference year in the most affected areas) could lead the poorest households to acute food insecurity as the lean season approaches. Given the unpredictability of price increases, the situation should be closely monitored and regularly updated. The deterioration of the purchasing power for very poor households, driven by such high prices, could lead to high malnutrition rates, even in a year of good agriculture production.

In **Mauritania**, the SMART (Standardized Monitoring and Assessment of Relief and Transitions) survey conducted in July 2012 indicates that nationally, the global acute malnutrition (GAM) prevalence rate is at 12%. This rate slightly increased compared to the 2011 July survey (10.7%). The severe acute malnutrition (SAM) prevalence rate slightly increased from 1.4% to 1.7% as well. The regional results indicate that the nutritional situation varies between 'serious' and 'critical' with the exception of Nouadhibou (where the global acute malnutrition prevalence rate is at 2.1%).

Impact on food security and nutrition (continued)

The threshold for a 'critical' level of gobal acute malnutrition (>15%) is exceeded in 4 regions : Hodh Chargui (16.2%), Assaba (16.4%), Brakna (17.1%) and Tagant (18.2%). In Brakna and Tagant, severe acute malnutrition prevalence exceeds the critical threshold by 2%. Guidimakha (14.5%) has surpassed the serious nutritional threshold (GAM >10%). This region shows a severe acute malnutrition prevalence exceeding the emergency threshold (2.5%).

Hodh Gharbni (13.7%), Gorgol (13.2%) and the three northern regions (Adrar, Inchiri and Tiris) (10.1%) are also in the 'serious' grouping. Trarza, Nouadhibou and Nouakchott show a prevalence rate below 10%. However, due to their precarious situation, Trarza and Nouakchott should be closely monitored.

In **Mali**, the final results of the Emergency Food Security Assessment (EFSA) conducted in August 2012 with the Early Warning System (SAP) indicate that 28% of internally displaced persons (IDP) have a poor food consumption, though 50% of interviewed households have received food assistance. In terms of food security, Northern regions are the most affected due to insecurity and the disruption of economic activities. In Kidal, 50% of displaced households are food insecure and almost 30% are food insecure in Tombouctou and Gao, considering the food consumption score. In occupied areas, the qualitative analysis indicates that in terms of food security, the situation of the whole population is similar to that of displaced and host families: food insecurity is invariably affecting the total population.

A Mali + (including Mauritania, Niger, Burkina Faso, Senegal, Guinea, Côte d'Ivoire and Algeria) contingency plan has been developed by the regional emergency and preparedness response working group (EPRWG) based on four potential scenarios regarding the conflict in Northern Mali.

In **Northern Nigeria**, a recent survey conducted in October 2012 (in Borno, Jigawa, Kano, Katsina, Kebbi, Sokoto, Yobe and Zamfara) by UNICEF indicates that the prevalence of global acute malnutrition is above 10% in all surveyed states, except Kano. The prevalence of global acute malnutrition is above 15% in Sokoto (16.2%) and requires immediate attention. Therefore, provision of nutritional support for children under the age of five years should continue.

In **Liberia**, Zwedru in the southeastern region recorded the most significant price rise of gasoline (110%) between August and September, the highest since 2009. The sharp increase in gasoline prices is due to the current deplorable state of the roads (as a result of heavy rains) which makes it impossible for gasoline tankers to reach supplies in Zwedru and other districts in the region, a situation that is putting pressure on prices of food and other essential commodities. This increase, combined with high transportation costs that have made access to markets particularly difficult, is impacting the purchasing power of most vulnerable households who rely on markets for their food.

In **Côte d'Ivoire**, the cocoa trade began in October. In the West, with the exception of Guiglo where the cocoa was at 538 francs CFA/kg in October 2012, the official price of 725 francs CFA/kg was effective in Man, Duékoué, Blolequin, Toulepleu and Zouan Hounien. By contrast, some buyers try to buy well below the official price. These illegal trackers benefit from the farmers' lack of organization and money to offer low purchases price which could go down to 400 francs CFA. This situation has been observed in remote sub-prefectures or areas (Zou, Gbapleu, Diéouzon, Bakoubly, etc.). The immediate consequence is the slump in cocoa sales for these producers who prefer to store their products instead of selling them off. Incomes generated by cocoa sales will be spent mostly on food expenditure, meaning that food access for food net buyers will depend on the respect of the official price and the capacity of buyers to pay the producers (WFP– Office d'aide à la commercialisation des produits vivriers de Côte d'Ivoire [OCPV]).

The results of the CFSVA (Comprehensive Food Security and Vulnerability Analysis) conducted in **Northern Ghana** indicates that: - More than 600,000 people were considered to be food insecure at the time of the survey and another 400,000 were estimated to be temporarily food insecure.

- The Upper East region has the highest proportion of food insecure households (27%). In the Northern and Upper West regions 10% and 16% of households respectively are food insecure. The five districts with the highest proportion of food insecure households are Wa West (42%), Central Gonja (39%), Talensi-Nabdam (39%), Kassena-Nankana West (35%) and Kassena-Nankana East (33%).
- Some 88% of northern households rely on crop cultivation as their chief livelihood activity and 95% have harvested or are planning to harvest one or more crops. When the harvest fails these households will be at greater risk of becoming food insecure.
- Food prices are rising dramatically, in part due to food production decline in the 2011 growing season as well as relatively high inflationary trends. Poorer households spend a larger share of their expenditures on food and are therefore more influenced by rising food prices.

A Joint Assessment Mission (JAM, WFP/UNHCR) has been recently conducted **in Liberia and Côte d'Ivoire** (Bangolo, Duekoué, Bloléquin, Toulepleu). The preliminary results indicate that the progressive return of internally displaced persons (IDP) has been hampered by recent attacks in Côte d'Ivoire and caused new departures for Liberia; internal population movements have stabilized; water access remains difficult; school canteens are not adequately supplied; health access remains precarious in all surveyed areas; late returnees have missed the agricultural campaign; markets supply remains disrupted; and on average, food stocks will cover a 2- to 4-month period.

Recommendations for the regional food security and nutrition working group

Continue to support the regional programme to combat locust infestations and strengthen national plans (Mali, Mauritania, Niger and Chad)	Increase efficiency of locust control operations (monitoring, control, logistic, equipment and treatment of infested areas)
Closely monitor the food and nutrition security situation in the Sahel and especially in northern Mali	Food and nutrition response scenarios are developed to improve preparedness
Closely monitor the food prices in Mali, Chad and Burkina Faso	Monitor the food access for the poorest households

Conclusions

- **Agricultural and pastoral prospects are generally good in West Africa and in the Sahel. However, high malnutrition rates, grain prices which remain high despite some decreases and food access issues for poor and very poor rural households, suggest that food insecurity will persist in 2013.**

Food security information in West Africa and the Sahel

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Mark your calendars !

> RPCA/AGIR meeting: from 4 to 6 December, Ouagadougou (Burkina Faso)
> Worldwide launch of CAP: 13 December 2012
> Issue of EWS vulnerability maps (available for Niger, Burkina Faso, Mali), underway
> CILSS market survey: from 4 to 16 February 2013