

SPECIAL REPORT
FAO/WFP CROP AND FOOD SUPPLY ASSESSMENT
MISSION TO LESOTHO

10 June 2003

Mission Highlights

- Domestic cereal supply in 2003/04 is estimated at 118 200 tonnes, while total national consumption requirement is estimated at 438 900 tonnes. This results in a cereal import requirement of 320 700 tonnes. Commercial imports are projected at 288 700 tonnes with food aid needs estimated at 32 000 tonnes. WFP has 12 000 tonnes in the pipeline, leaving a gap of 20 000 tonnes to be covered by additional external assistance.
- The Mission forecasts 2002/03 cereal production at 89 100 tonnes. Maize production is estimated at 61 400 tonnes, wheat at 24 300 tonnes and sorghum at 3 400 tonnes. Aggregate cereal production this year will be 66 percent higher than the very low production of 53 800 tonnes estimated by last year's FAO/WFP Mission.
- A combination of better though below normal domestic cereal production and improved commercial import capacity suggests that there will be no serious cereal shortages at the national level. However, the key issue remains physical and economic access to food for certain segments of the population.
- The Mission estimates that 32 000 tonnes of cereals will need to be distributed as food aid to targeted households. The number of beneficiaries will vary from 125 000 to about 270 000 during the lean period. Targeted food assistance is recommended to households that have lost their crops entirely and have no livestock and those affected by HIV/AIDS. Emergency provision of agricultural inputs to these families for the next cropping season will be also necessary.
- Agriculture in Lesotho faces a long term decline if current trends continue. Severe soil and land degradation, lack of proper land and crop husbandry practices, inefficient use of improved seeds, fertilizers and pesticides, and an extension service without appropriate technical messages continue to hamper agricultural production.

1. OVERVIEW

Following two consecutive years of poor harvests, the Government of Lesotho requested FAO and WFP for assistance in reviewing the country's food situation and outlook for the 2003/04 marketing year. Consequently, an FAO/ WFP Crop and Food Supply Assessment Mission was fielded from 22 April to 1 May, 2003 to estimate the current season cereal production, assess the overall food supply situation and forecast import requirements for 2003/04 marketing year (April/March), including food assistance needs.

The Mission received full cooperation from the Ministry of Agriculture and Food Security, the Ministry of Economic Planning, the Disaster Management Authority, the Ministry of Industry, Trade and Marketing, and the Bureau of Statistics. Discussions were also held with relevant UN agencies including UNICEF, WHO, UNDP, as well as donor representatives, NGOs, and grain importers. The Mission split into two groups and was able to cover all the ten districts of the country. Interviews were conducted with each District Agricultural Officer and staff from crops, livestock, extension, disaster management, nutrition, and health divisions to get information and their assessment of the situation within their districts. Interviews were also conducted with Village Chiefs, farmers, households and traders. Overall, more than 120 interviews were conducted during the course of the mission.



FOOD AND AGRICULTURE ORGANIZATION OF THE UNITED NATIONS, ROME



WORLD FOOD PROGRAMME, ROME

The Mission forecasts 2002/03 cereal production at 89 100 tonnes. Maize production is estimated at 61 400 tonnes, wheat at 24 300 tonnes and sorghum at 3 400 tonnes. Other crops such as beans, potatoes and peas were also observed on most farmers' fields and contribute to the diet of families and cash incomes when grown in larger quantities. The Government cereal production figures for the last few years appear to be biased upwards. The Mission therefore uses last year's FAO/WFP assessment mission figures for comparison. On this basis, production this year will be 66 percent higher than the very low production last year. The Mission estimated the total cropped area at 178 300 hectares, about 84 percent of the area in normal years and 33 percent higher than last year's figure. Some land was not planted because of the late arrival of subsidised inputs and the lack of tractors and machinery.

With an estimated total domestic cereal supply of 118 200 tonnes, and total utilization requirement of 438 900 tonnes, the country faces a shortfall of about 321 000 tonnes for 2003/04 marketing year. Commercial imports are forecast at 288 700 tonnes, leaving a gap of 32 000 tonnes to be covered as food aid. Against this requirement, WFP food aid in the pipeline for the current marketing year stands at 12 000 tonnes. Thus, there is an uncovered requirement of 20 000 tonnes which needs to be met by additional external food assistance.

A combination of better though below normal domestic cereal production and improved commercial import capacity suggests that there will be no serious cereal shortages at the national level. However, the key issue remains physical and economic access to food for certain segments of the population. High unemployment and inflation rates, particularly in the rural areas, coupled with the impact of HIV/AIDS means that certain segments of the population do not have the purchasing power to access food even if it is available in the market.

Inflationary pressures in 2002 were strong resulting in double-digit inflation for the first time in about 7 years. The food items that contribute about 36 percent of the consumer price index were the main drives of overall inflation. The food items index rose by an average of 26.3 percent during the year compared to an average increase of 6.7 percent in 2001. Timely Government interventions such as the Famine Relief Programme and food assistance from the international community contributed to mitigate the food crisis of last year.

Early this year the price of cereals began to decline as harvest prospects improved. It is expected that cereal prices will continue to decline over the course of the marketing year as millers exhaust their stocks of cereals bought at very high prices last year. Furthermore, a good maize production in South Africa will also contribute to the decline in prices. The maize SAFEX (South Africa Futures Exchange) prices have declined from a high of R2045/tonne in April 2002 to R782/tonne in April 2003. It is likely that the appreciation of the Rand will contribute to lower demand from other regional countries for South African grain as it has become relatively more expensive. Countries that normally import cereals from South Africa may look to international markets elsewhere. Swaziland and Lesotho are the only regional countries that are not impacted by the appreciation of the Rand as their currencies are pegged at par with it.

UNAIDS estimates that the HIV prevalence in Lesotho is about 31 percent. It is likely that the infection rates may be even higher because HIV/AIDS remains a stigmatised disease and there is no real economic or medical incentive for people to disclose their infection. Infection rates are particularly high among young adults who form a large proportion of the economically active population. In addition to its humanitarian and social consequences, HIV/AIDS has severe economic costs, as it constrains output growth, eliminates work skills and knowledge, shrinks the tax base, raises health-related costs, reduces disposable income, and increases financial imbalance in the public pension funds. Serious and immediate interventions need to be designed and implemented to control this disease. In the absence of such measures the overall economic and social conditions in the country will continue to worsen.

The Mission estimates that 38 000 tonnes of mixed food commodities, including 32 000 tonnes of cereals, will need to be distributed as food aid to targeted households. The number of beneficiaries will vary from around 225 000 to about 432 000 during the lean period. The assistance for HIV/AIDS affected households will be implemented in all of the 10 districts. In addition, in some districts there will be emergency assistance targeting households that have lost their crops entirely and have neither livestock nor off-farm income with which to buy food from the market.

Agriculture in Lesotho faces a catastrophic future due to structural rather than seasonal constraints. Severe soil and land degradation, lack of proper land and crop husbandry practices, inefficient use of improved seeds, fertilizers and pesticides, and an ineffective extension service continue to hamper agricultural production and development. If long-term interventions are not introduced as a matter of urgency, it is highly probable that crop production will completely cease on large tracts of agricultural land.

2. CURRENT SOCIO-ECONOMIC CONDITIONS

Lesotho's economic performance has improved over the last two years but remains below the high growth rates achieved in early to mid 1990s. The real GDP growth rate in 2002/03 was 4 percent compared to 3 percent in 2001/02. It is projected that the growth rate will be around 4.4 percent during the current fiscal year. The key factors for improved growth prospects include successful completion of elections in May 2002 that bolstered confidence and foreign direct investment in the textile and clothing industries as well as in construction and manufacturing sectors. The manufacturing and construction sectoral growth rates are projected at 10 percent each, whereas the agricultural sector is expected to contract by about 1.4 percent reflecting long term depression rather than seasonal constraints.

The budget for fiscal year 2003/04 projects a deficit of Maloti 742.9 million before grants—8.5 percent of GDP. However, after grants the deficit drops to M450.4 million or 5.2 percent of GDP. Major expenditure allocations include 28 percent for education and culture, 12.3 percent for health and social security, and 6.1 percent for agriculture and rural development.

The third review of Lesotho's economic performance under the three-year Poverty Reduction and Growth Facility (PRGF) programme was completed in September 2002. The review stated that Lesotho observed most of the quantitative and structural performance criteria and completed most structural benchmarks. However, the criterion on domestic financing was breached mainly due to delayed external disbursements. The domestic revenue collections fell below the projections during the year, but the establishment of Lesotho Revenue Authority (LRA) last year is expected to curb revenue leakages. LRA is expected to function as an autonomous self-financing body responsible for tax, sales tax and customs and excise departments.

The dependence on revenue from South African Customs Union (SACU) is being gradually reduced from over 75 percent in the mid 1980s to about 50 percent in recent years. It is expected that revenues from this source will continue to decline as external tariffs come under World Trade Organization rules and in line with other free trade agreements. However, Lesotho may continue to benefit under the new SACU agreement signed in 2002, under which payments to Lesotho will be higher due to its lower per capita income compared with other SACU member countries.

Lesotho has been a major beneficiary of the US Government's Africa Growth and Opportunities Act (AGOA). At the end of 2002 approximately 44 000 jobs depended on manufactured exports with the expectation that more jobs will be created in the export sector. The Government is committed to follow export-oriented policies and acknowledges that the future of economic growth in Lesotho depends on the success of continuously attracting foreign direct investment (FDI). However, this policy needs to be carefully examined because the main attraction for FDI in Lesotho is not necessarily its comparative advantage or natural resource base for the production of export commodities, but rather because of its preferential access to various international markets.

Lesotho's current account deficit for 2001/02 is estimated at US\$ 72.3 million and capital and financial accounts at US\$ 111.5 million. The trade deficit is estimated at US\$ 353.8 million with exports accounting for 47 percent of the total imports (Figure 1). The key exports remain textiles, footwear, mohair and some live animals.

Figure 1. Imports and Exports of Lesotho 1997/98 to 2001/02



Source: Central Bank of Lesotho, IMF Country Report 2002

The external debt for the fiscal year 2002/03 is estimated at US\$ 735 million resulting in an external debt to GDP ratio of 69.7 percent and debt service ratio of 9.7 percent. Official foreign exchange reserves are expected to be US\$ 381.3 worth five months of imports of goods and services.

Lesotho's currency, the Maloti, (pegged at par with the South African Rand) which had been declining against major world currencies since 1998/99 began to appreciate after hitting a low of US\$1 = M11.6 in January 2002. Currently the Maloti is trading at US\$1 = M7.4, a 36 percent appreciation since the beginning of last year. Increased global demand for gold from South Africa, considered a safe investment in times of heightened global political and economic uncertainty, has contributed to the appreciation of the Rand and therefore the Maloti. The depreciation of the US dollar against major currencies also made gold relatively cheaper for investors. A stronger Maloti implies cheaper imports for Lesotho, which could improve the balance of payments. However, the downside is that the country's foreign reserves in other major currencies have declined due to this revaluation.

Average unemployment rate for Lesotho remains around 30 percent, but there have been some significant positive developments in 2002. The unemployment situation for Basotho workers in South African mines stabilized in 2002 after declining for over 10 years and the average annual earnings increased by 10 percent (Table 1). This increase is largely attributed to higher demand for South African gold in an environment of increased global economic and political uncertainty. However, despite these developments the number of Basotho working in South Africa stands at 50 percent of the 1991 level.

Table 1. Number of Basotho Working in the South African Mines (1991-2002)

Year	Number of Workers	Year on Year Change (%)	Average Earnings (Rand)	Year on Year Change (%)
1991	122 188		1 194	
1992	119 596	-2.1	12 440	941.9
1993	116 129	-2.9	13 359	7.4
1994	112 722	-2.9	14 562	9.0
1995	103 744	-8.0	16 801	15.4
1996	101 262	-2.4	19 186	14.2
1997	95 913	-5.3	21 193	10.5
1998	80 445	-16.1	24 678	16.4
1999	68 604	-14.7	27 657	12.1
2000	64 907	-5.4	30 131	8.9
2001	61 412	-5.4	32 030	6.3
2002	62 158	1.2	35 326	10.3

Source: Central Bank of Lesotho Annual Report 2002

The Mission observed that the HIV/AIDS pandemic is severely impacting the labour force of the country. UNAIDS estimates that the HIV prevalence in Lesotho is about 31 percent. Lesotho is the fourth most affected country in the world following Botswana (38.8 percent), Zimbabwe (33.7 percent) and Swaziland (33.4 percent). While infections have declined in some countries (Botswana, Namibia and South Africa), infection rates in Lesotho continued to rise over the last decade to the current levels. It is likely that the HIV infection rate may be even higher because HIV/AIDS remains a stigmatised disease and there is no real economic or medical incentive for people to disclose infection. The hospitals in rural Lesotho that the Mission visited had over 90 percent of patients with full-blown AIDS and HIV/AIDS related diseases. Retrovir drugs are not available or they are too expensive for the population.

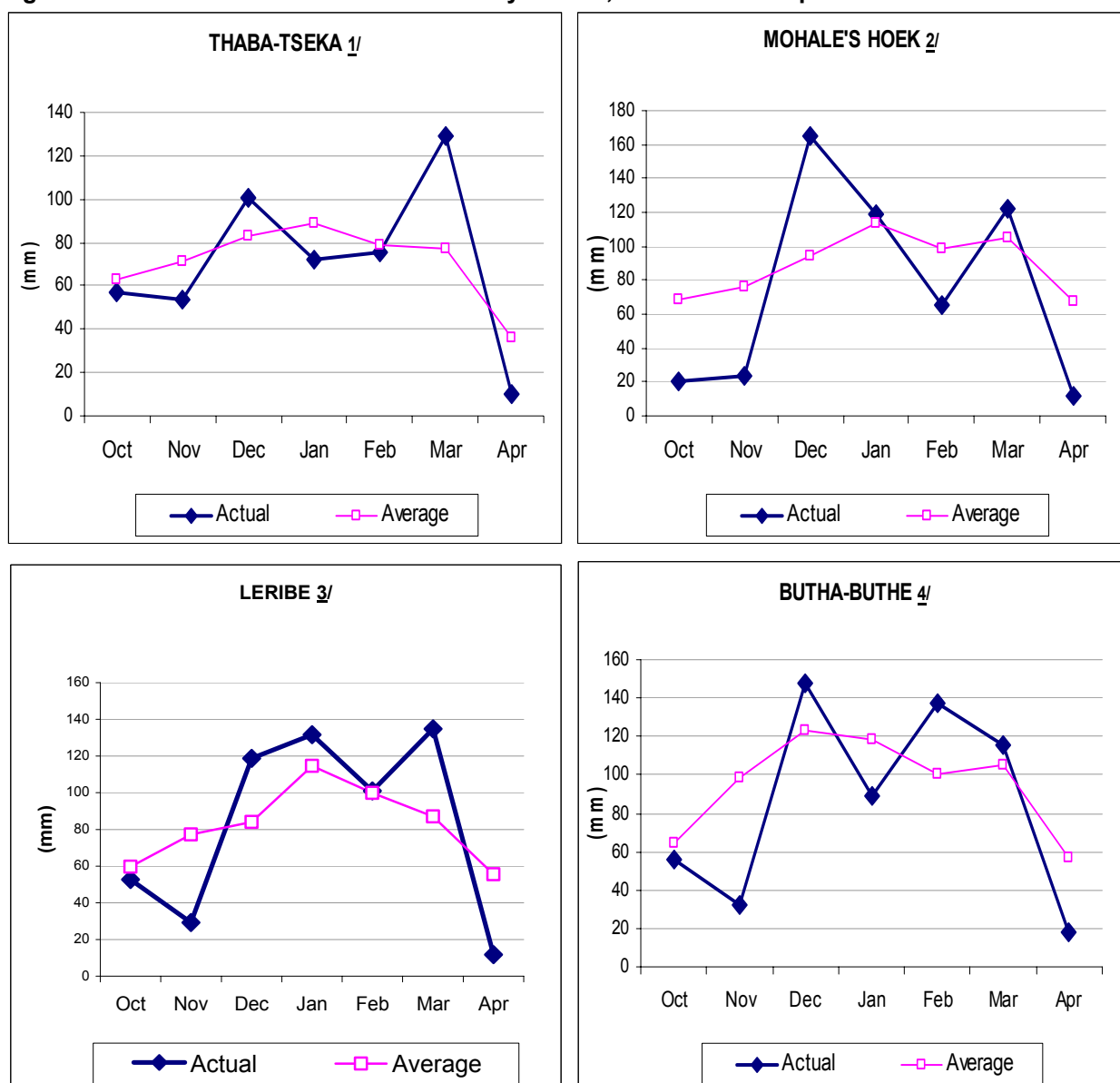
3. FOOD PRODUCTION IN 2002/03

The agricultural sector in Lesotho continues to face extremely serious structural problems. Severe soil and land degradation, lack of proper land and crop husbandry practices, inefficient use of improved seeds, fertilizers and pesticides, and an extension service without appropriate technical messages hamper agricultural production and development. If long-term interventions are not introduced as a matter of urgency, it is highly probable that crop production will completely cease on large tracts of agricultural land. Lesotho's last agricultural census (1999/2000) highlighted the fact that the country's cultivated land has increased from 317 900 to 406 500 hectares between 1989 and 2000, with the increase attributed to extension of cultivation to marginal lands that were previously fallow/grazing land.

Agro-meteorological conditions

In general, this year the distribution of rains was generally better in the north as compared to the south of the country (Figure 2). The onset of the rains was in October in most areas, which facilitated early land preparation where fields had been ploughed during the winter. This ensured that the optimum planting date for maize and sorghum was achieved where machinery and physical inputs were available. November was a dry month throughout the country with most stations receiving only a third of their normal rainfall, and this resulted in delayed planting operations for farmers. The remainder of the rainy season was erratic and the distribution uneven, particularly in southern districts of the country

Figure 2. Lesotho: Actual vs. normal monthly rainfall, October 2002-April 2003



1/ Mountains, 2/ Southern Lowland, 3/Northern Lowland, 4/ Foothills.

Source: Department of Agro meteorology

Supply of agricultural inputs

Following two years of poor crop production, the Government declared a state of famine in the country in May 2002. As part of their response, the GoL through its famine relief programme, devised a crop input subsidy scheme with the objective of increasing the purchasing power of the farming community for inputs that would enable them to recover from the crisis. The intention was to ensure that all fields, everywhere in the country, were ploughed, fertilized and planted. Funds amounting to more than US\$ 7.5 million were disbursed by GoL for the provision of machinery and the purchase of seed and fertilizer; FAO, UNICEF, Lesotho Red Cross and Care International also provided inputs under this programme.

Various seeds and fertilizer were subsidised at 50 percent and distributed to farmers either for payment in cash or on a credit basis. Field machinery operations such as ploughing, cultivating and planting were also subsidised at 50 percent. All farmers were entitled to seed, fertilizer and machinery at subsidised rates, the quantities being based on the size of their fields as calculated by Extension Officers in the District Agricultural Offices. Quantities of seed and fertilizer distributed per district are shown in Table 2. In addition, the GoL has purchased 60 000 tonnes of lime, which is currently arriving in the country and will be distributed to all districts. Soils are tending to become more acidic and this reduces the yield potential of all crops.

Table 2. Total quantities of subsidised seed and fertilizer by district in 2002/03 (tonnes)

DISTRICT	TYPE OF INPUT						
	Fertilizer	Maize	Beans	Wheat	Peas	Sorghum	Potatoes
Botha Bothe	878.4	65.9	91.3	1.0	0.0	0.0	45.0
Leribe	3 392.1	216.9	160.0	17.1	0.5	0.3	57.5
Berea	4 287.7	246.4	168.6	29.3	0.0	0.0	97.5
Maseru	3 922.3	431.7	171.9	30.0	5.8	13.8	186.0
Mafeteng	2 057.3	136.6	74.0	15.4	0.0	7.5	43.5
Mohale's Hoek	2 144.8	92.0	85.7	16.7	0.0	28.5	69.5
Quthing	715.4	47.2	36.6	26.5	3.0	5.0	66.5
Quacha's Nek	245.5	22.8	44.5	72.6	2.6	0.0	37.5
Thaba-Tseka	141.0	29.7	8.0	22.7	1.2	1.3	20.0
Mokhotlong	85.8	19.8	31.1	95.2	0.0	0.0	27.5
TOTAL	17 870.3	1 309.0	871.7	326.5	13.1	56.4	650.5

In total, 17 870.3 tonnes of fertilizer were distributed along with 3 227.2 tonnes of seed. In addition, fodder seeds were distributed: 22.6 tonnes of teff, 42.5 tonnes of fodder sorghum, 9.9 tonnes of triticale, and 22.6 tonnes of oats. Unfortunately, the inputs arrived late in most areas which severely delayed planting, in some districts incompatible fertilizers and seeds were delivered and there was also inequitable distribution of these inputs.

Areas planted

Following the 2001/02 cropping season when large areas of arable land lay fallow in all districts because of heavy and widespread rains which interrupted planting, there was a concerted drive to plant as much land as possible during the 2002/03 season. This is presented in Tables 3a and 3b below, the first comparing Government statistics and the second comparing the estimates of the Mission with last year's Mission estimates.

The area planted to each of the major cereal crops in each district is given in Table 4b. The total national maize area is estimated at 148 400 ha, while the area under sorghum and wheat is estimated at 7 300 ha and 22 600 ha respectively.

Table 3a. Total Cereal Area ('000 hectares) in 2002/03 compared to 1997/98-2001/02 Average

DISTRICT	1997/98	1998/99	1999/00	2000/01	2001/02	5 Year Average	2002/03	Percent of average
Butha-Buthe	4.9	5.6	10.7	7.5	6.7	7.1	9.3	130.9
Leribe	27.8	35.1	41.0	47.7	36.5	37.6	38.8	103.2
Berea	12.9	20.6	35.3	34.3	30.1	26.6	31.4	118.0
Maseru	24.2	33.2	37.6	42.3	27.4	32.9	31.8	96.7
Mafeteng	12.3	23.0	36.4	54.2	28.4	30.9	32.8	106.1
Mohale's Hoek	16.2	29.9	17.3	40.0	18.7	24.4	19.5	79.9
Quthing	9.2	12.6	11.1	14.8	8.5	11.2	9.1	81.3
Qacha's Nek	3.4	3.8	6.6	7.2	5.3	5.3	4.3	81.1
Mokhotlong	14.8	13.1	12.6	14.5	13.4	13.7	7.1	51.8
Thaba-Tseka	32.3	22.3	17.1	19.3	18.2	21.8	25.4	116.5
LESOTHO	158.0	199.2	225.7	281.8	193.2¹	211.5	209.5	99.1

Source: Bureau of Statistics; Estimates by the Dept. of Crops.

Totals computed from unrounded data.

1/ Official Government Statistics for 2001/02 put the total cereal area in Lesotho at 193 200 hectares. This compares with the FAOWFP Crop and Food Supply Assessment Mission figure of 133 600 hectares. There is a large difference between these figures particularly as such large areas remained unplanted, and a correction to official figures must be made to take account of this variation.

Table 3b. Total Cereal Area ('000 hectares) in 2002/03 Compared to 2001/02 FAO/WFP Mission Estimates.

DISTRICT	2001/02	2002/03	Percent 2002-03 of 2001/02
Butha-Buthe	4.4	5.6	127.3
Leribe	21.2	23.0	108.5
Berea	20.1	41.7	207.5
Maseru	22.9	34.8	152.0
Mafeteng	18.0	20.8	115.6
Mohale's Hoek	13.5	17.2	127.4
Quthing	10.7	9.4	87.9
Qacha's Nek	5.1	4.3	84.3
Mokhotlong	6.2	8.3	133.9
Thaba-Tseka	11.5	13.2	114.8
LESOTHO	133.6	178.3	133.5

Source: FAO/WFP 2002 and 2003 Missions.

Crop yields

The Mission's estimates of crop yields for the year 2002/03 are based on data provided by the Department of Crops, adjusted on the basis of field assessments. Table 4 a provides the area and yield estimates of cereal production by the Department of Crops and Table 4b gives the Mission estimates of area, yield, and cereal production. Yields per hectare at the national level were higher than last year but remained highly variable between districts. Southern lowland districts of Mafeteng, Mohale's Hoek and Quthing were worst affected and in many areas will produce no grain at all for the second consecutive year. Northern lowland districts of Berea, Leribe, and Butha-Buthe were relatively less affected and yields were slightly better. All foothill and mountain areas although variable even within districts showed the best potential.

Table 4a. Area and Yield of Cereal Crops in 2002/03, by District

DISTRICT	Wheat			Maize			Sorghum		
	Area '000 ha	Yield Kg/ha	Prod. '000 tonnes	Area '000 ha	Yield Kg/ha	Prod. '000 tonnes	Area '000 ha	Yield Kg/ha	Prod. '000 tonnes
Butha-Buthe	0.7	520	0.4	6.9	198	1.4	1.7	62	0.1
Leribe	3.5	1 730	6.0	30.7	705	21.6	4.6	103	0.5
Berea	1.4	1 730	2.4	26.3	630	16.6	3.7	429	1.6
Maseru	1.2	1 470	1.5	26.2	451	11.8	4.4	134	0.6
Mafeteng	3.5	1 500	5.3	24.7	510	12.6	4.6	512	2.4
Mohale's Hoek	4.0	1 000	4.0	12.5	292	3.6	3.0	91	0.3
Quthing	2.5	1 000	2.5	5.1	299	1.5	1.5	95	0.1
Qacha's Nek	1.6	860	1.4	2.1	450	0.9	0.6	111	0.1
Mokhotlong	0.5	1 040	0.5	6.5	72	0.5	0.1	-	-
Thaba-Tseka	11.0	740	8.1	12.7	352	4.5	1.7	629	1.1
LESOTHO	29.9	1 070	32.1	153.7	488	75.0	25.9	258	6.8

Source: Department of Crops 2003

Table 4b. Area and Yield of Cereal Crops in 2002/03, by District

DISTRICT	Wheat			Maize			Sorghum		
	Area '000 ha	Yield Kg/ha	Prod. '000 tonnes	Area '000 ha	Yield Kg/ha	Prod. '000 tonnes	Area '000 ha	Yield Kg/ha	Prod. '000 tonnes
Butha-Buthe	1.1	500	0.6	4.3	450	1.9	0.2	300	0.1
Leribe	3.5	1 700	6.0	19.5	500	9.8	-	-	-
Berea	1.4	1 700	2.4	40.2	500	20.1	0.1	500	0.1
Maseru	1.2	1 450	1.7	32.2	400	12.9	1.4	450	0.6
Mafeteng	3.4	1 500	5.1	17.0	250	4.3	0.4	450	0.2
Mohale's Hoek	1.5	1 000	1.5	11.1	300	3.3	4.6	450	2.1
Quthing	0.4	1 000	0.4	8.6	300	2.6	0.4	450	0.2
Qacha's Nek	1.2	350	0.4	3.1	300	0.9	-	-	-
Mokhotlong	4.5	1 050	4.7	3.8	350	1.3	-	-	-
Thaba-Tseka	4.4	350	1.5	8.6	500	4.3	0.2	300	0.1
LESOTHO	22.6	1 075	24.3	148.4	414	61.4	7.3	466	3.4

Source: FAO/WFP Mission 2003.

Extensive discussions were held with farmers, extension workers, District Agricultural Officials, the Ministry of Agriculture at Headquarters, and the Disaster Management Authority Officials. It was clearly established that very late planting of the crops due to the late arrival of subsidised seed and fertilizers and the shortage of tractors and machinery were the main constraint to production this year. The most important factor was the late planting of the maize and sorghum crops, for which any delay after the optimum planting date considerably reduces yield. Scattered and generally localised hailstorms also caused some damage in some districts, and cutworms and stalk borers caused further damage to the crops, particularly those planted late.

National average yields of maize and sorghum are estimated at 414 kg/ha and 466 kg/ha, respectively. Combined summer and winter wheat average yields are estimated at around 1 075 kg/ha. Table 5a compares this year's estimated total cereal production with that of the last five years and Table 5b compares this year's estimated cereal production with the estimates made by last year's FAO/WFP Mission.

Table 5a. Total Cereal Production ('000 tonnes) in 2002/03 Compared to 1997/98-2001/02 Average.

DISTRICT	1997-98	1998-99	1999-00	2000-01	2001-02	5 year average	2002-03	Percent of average
Butha-Buthe	11.4	8.3	12.5	7.0	4.0	8.6	1.9	22.1
Leribe	26.5	36.5	36.6	44.4	34.0	35.6	28.1	78.9
Berea	24.8	19.9	38.0	29.4	25.8	27.6	20.6	74.6
Maseru	27.9	38.9	29.6	44.7	21.4	32.5	13.9	42.8
Mafeteng	9.3	8.9	15.9	41.1	19.3	18.9	20.3	107.4
Mohale's Hoek	27.1	17.8	8.9	46.4	6.6	21.4	7.9	36.9
Quthing	10.3	11.0	12.7	16.1	3.0	10.6	4.1	38.7
Qacha's Nek	2.3	1.6	4.0	6.6	5.0	3.9	2.4	61.5
Mokhotlong	19.6	9.0	6.0	21.4	11.8	13.6	1.0	7.4
Thaba-Tseka	31.8	20.9	14.3	24.5	11.2	20.5	13.7	66.8
LESOTHO	191.0	172.8	178.5	281.6^{1/}	142.1^{2/}	193.2	113.9	59.0

Source: Bureau of Statistics; estimates by the Dept. of Crops and the Mission for year 2002/03

1/ Official Government Statistics for 2000/01 put the total cereal production in Lesotho at 281 600 tonnes. This compares with the FAO/WFP Crop and Food Supply Assessment Mission figure of 80 300 tonnes and the Lesotho Early Warning Unit figure of 159 000 tonnes. There is a tremendous disparity between these figures, and during extensive discussions in country, this mission feels that the correct figure may be closer to the last year's assessment figure. A correction to official figures should be made to take account of this discrepancy.

2/ Official Government Statistics for 2001/02 put the total cereal production in Lesotho at 142 100 tonnes. This compares with the FAO/WFP Crop and Food Supply Assessment Mission figure of 53 800 tonnes. Once again, there is a tremendous disparity between these figures, and a correction to official figures must be made to take account of this discrepancy.

Table 5b. Total Cereal Production ('000 tonnes) in 2002/03 Compared to 2001/02 FAO/WFP Mission Estimates.

DISTRICT	2001/02	2002/03	Percent 2002-03 of 2001/02
Butha-Buthe	2.0	2.6	130.0
Leribe	11.2	15.8	141.1
Berea	10.3	22.6	219.4
Maseru	9.6	15.2	158.3
Mafeteng	6.0	9.6	160.0
Mohale's Hoek	4.0	6.9	172.5
Quthing	3.1	3.2	103.2
Qacha's Nek	1.3	1.3	100.0
Mokhotlong	2.8	6.0	214.3
Thaba-Tseka	3.5	5.9	168.6
LESOTHO	53.8	89.1	165.6

Winter wheat

The 2002 wheat crop was higher than the previous year – a larger area was planted and generally better yields were achieved. At the time of the mission visit, some farmers were busy planting winter wheat that will be harvested in September/October 2003. Planting of winter wheat normally starts in mid-April making use of the residual moisture and small amounts of rainfall. Sporadic rainfall during April will have helped land preparation and planting operations, although soil moisture levels are not as high as in 2002. It is expected that there will be a similar area to 2002 planted to winter wheat this year.

Estimated cereal production in 2002/03

Estimated cereal area in 2002/03 is shown in Tables 3a (GOL) and 3b (Mission), while Table 4a presents GOL estimates of cereal production and 4b presents the cereal production estimates of the Mission.

Maize production is estimated by the Mission at 61 400 tonnes while sorghum and wheat production is estimated at 3 400 tonnes and 24 300 tonnes respectively. The aggregate cereal production in 2002/03 is estimated at 89 100 tonnes. The accuracy of Government cereal production figures for last year is highly questionable, and they appear to be biased upwards. The Mission therefore uses last year's FAO/WFP assessment mission figures for comparison. On this basis, production this year will be 66 percent higher than the low drought-affected production of last year.

Other crops

Beans and peas are extensively grown, largely for home consumption, but also for cash when grown in larger quantities. Most households grow beans during the summer in rotation with cereals while peas are grown during winter using residual moisture and any rain. Bean yields during the last cropping season were extremely low because of dry conditions at planting and again at flowering in January, and will considerably reduce the dietary protein available to households. Other crops observed were potatoes, pumpkins, sunflower, citrus, fruit trees, vegetables and alfalfa for dairy cows.

Livestock situation

The majority of rural households, (perhaps over 80 percent) own livestock, mainly cattle, sheep and goats; many also have a horse, two or more donkeys and chickens. Table 6 shows numbers of livestock throughout the country in 2000/01.

Table 6. Lesotho: Livestock Numbers in 2000/01

DISTRICT	Cattle	Sheep	Goats	Horses	Donkeys
Butha-Buthe	39 065	59 945	41 645	4 325	11 510
Leribe	129 875	108 450	119 500	16 625	30 750
Berea	86 625	60 250	37 875	5 625	26 250
Maseru	128 125	153 700	88 875	16 875	28 250
Mafeteng	79 894	138 564	55 938	6 313	22 688
Mohale's Hoek	55 750	86 645	150 750	10 125	17 375
Quthing	43 500	99 375	96 125	6 750	7 625
Qacha's Nek	22 675	52 200	14 800	3 975	4 500
Mokhotlong	43 875	165 125	72 250	8 875	11 000
Thaba-Tseka	80 500	192 375	152 500	17 250	20 000
LESOTHO	709 884	1 116 629	830 258	96 738	179 948

Source: Bureau of Statistics

Large herds of cattle were noted in lowland areas and flocks of sheep in the mountain areas in particular, but pastures are deteriorating fast after poor rainfall during the latter part of the rainy season.

Livestock theft continues to be a major problem in the country. Thefts occur in and between villages, between districts, and across borders. The situation is becoming increasingly dangerous, and is having a serious negative impact on household food security. Livestock are a vital source of cash to purchase food when agricultural production is low, as it is this year; and they also supply draught power for cultivation.

4. FOOD SUPPLY AND DEMAND SITUATION

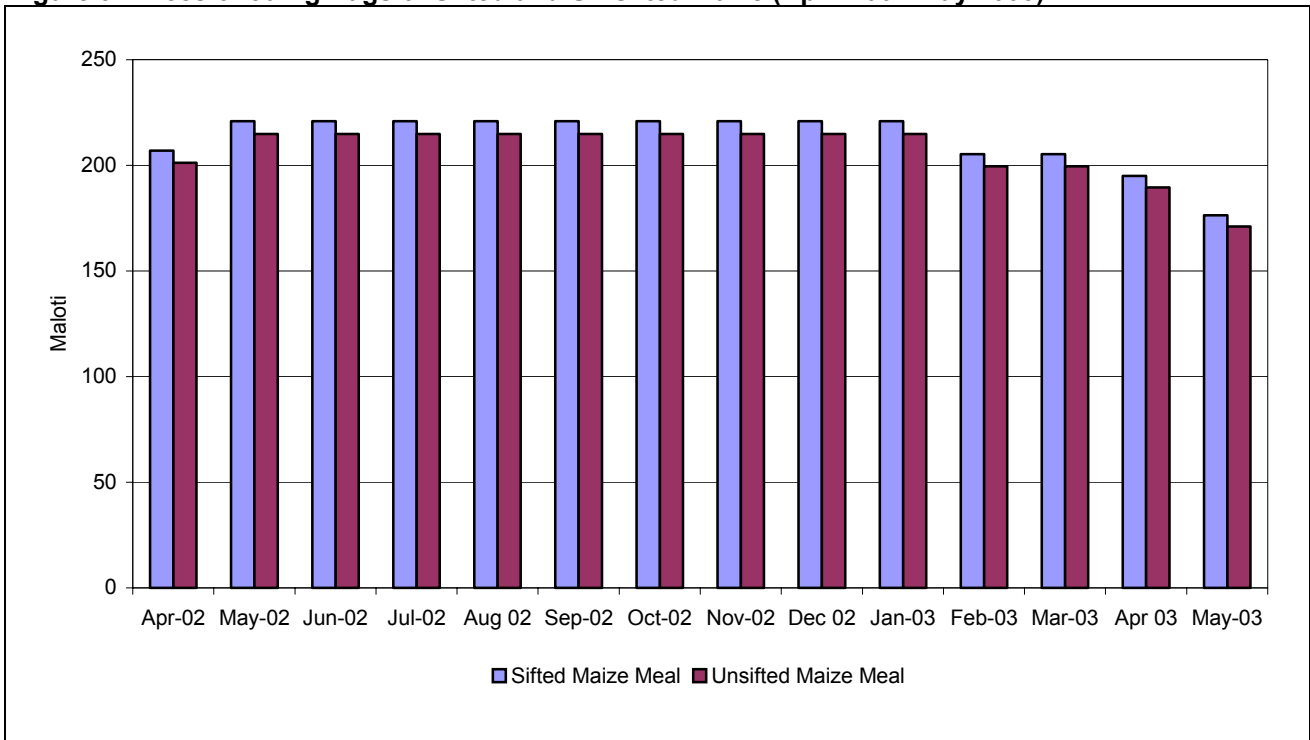
Access to food and prices

Lesotho is a net importer of maize, wheat, pulses, dairy products and other food commodities. For maize, the main staple food, imports represent 60-65 percent of national requirements. Other than for wheat, virtually all imports come from the Republic of South Africa. In accordance with the SACU agreement, Lesotho does not impose duties on imports from RSA. Thus, food prices in Lesotho are closely linked to those in RSA.

Inflationary pressures in 2002 were strong resulting in double-digit inflation for the first time in about 7 years. The average annual inflation rate in 2002 was 11.9 percent compared to about 7.2 percent in 2001. The inflation rate largely rose due to supply side factors such as the poor harvest of 2002, a significant depreciation of the Loti in the last quarter of 2001, and a sustained increase in international oil prices. The food items that make up 36 percent of the consumer price index were the main drives of the overall inflation. The food index rose by an average of 26.3 percent during the year compared to an average increase of 6.7 percent in 2001. Timely Government interventions such as the Famine Relief Programme and food assistance from the international community contributed to mitigating the food crisis of last year.

In early 2003 the prices of cereals, particularly maize, began to decline as the prospects of relatively better cereal harvest improved at the regional level. The price of an 80 kg bag of sifted and un-sifted maize has continued to decline since January 2003 (Figure 3). It is expected that cereal prices will continue to decline over the course of the marketing year as millers exhaust their stocks of cereals bought forward at very high prices last year. Furthermore, improved domestic cereal production as well as a good maize harvest in South Africa will also contribute to the decline in prices.

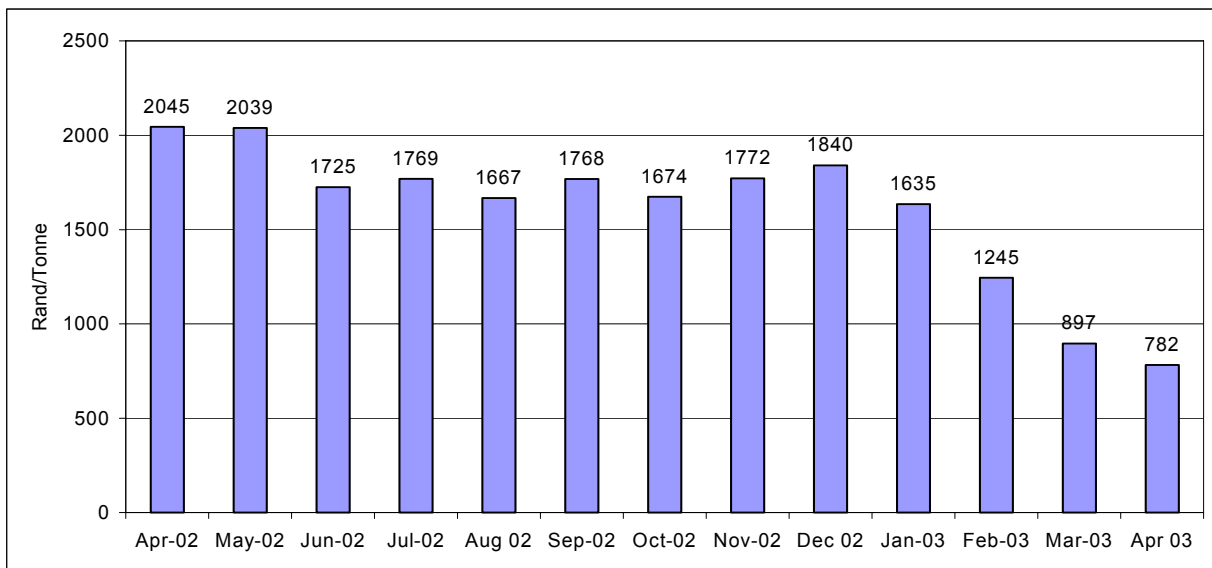
Figure 3. Prices of 80 Kg Bags of Sifted and Un-sifted Maize (April 2002-May 2003)



Source: Marketing Section of Ministry of Agriculture

The maize SAFEX (South Africa Futures Exchange) prices anticipating another good harvest have declined from a high of R 2045/tonne in April 2002 to R 782/tonne in April 2003 (Figure 4). It is expected that the appreciation of the Rand will contribute to reduced demand from other regional countries for South African commodities including cereals as they have become relatively more expensive. Countries that normally import cereals from South Africa may look to international markets elsewhere. Swaziland and Lesotho are the only regional countries that are not impacted by the appreciation of the Rand as their currencies are pegged at par with it.

Figure 4. SAFEX Spot Prices for Maize (April 2002-March 2003)



Cereal supply-demand balance, 2003-04

The forecast of the cereal supply-demand situation (Table 7) for the marketing year 2003/04 (April/March) is based on the following assumptions and Mission observations.

- Farmers interviewed by the Mission stated that they had no stocks due to the poor harvest last year. Therefore, it has been assumed that the opening on-farm stocks are zero. The Ministry of Industry, Trade and Marketing provided figures for commercial opening stocks (1/04/03) for the current marketing year. The closing stocks are based on 2 weeks maize and one month of wheat consumption.
- The mid-marketing year 2003/04 population is estimated at 2 237 320 using a growth rate of 1.2 percent.
- Per capita consumption rates per year used are: 127 kg for maize, 42 kg for wheat and 12 kg for sorghum.
- "Other uses" cover essentially post harvest losses and seed use. They are estimated at 6 percent for maize, sorghum and wheat.

Table 7. Lesotho: Cereal Balance Sheet for 2003/04 (000 tonnes)

	Maize	Wheat	Sorghum	Total
Domestic availability	76.5	38.3	3.4	118.2
Opening stocks	15.1	14.0	0.0	29.1
Production	61.4	24.3	3.4	89.1
Total utilisation	299.6	103.3	36.0	438.9
Food use	284.1	94.0	35.8	413.9
Other uses	3.7	1.5	0.2	5.4
Closing stocks	11.8	7.8	0.0	19.6
Import requirements	223.1	65.0	32.6	320.7
Commercial imports	191.1	65.0	32.6 ^{1/}	288.7
Food aid	32.0	0.0	0.0	32.0
In the pipeline	12.0	0.0	0.0	12.0
Still to be pledged	20.0	0.0	0.0	20.0

1/ The sorghum import requirement to be met by maize imports.

Table 7 shows a cereal import requirement of 320 700 tonnes. The Mission estimates that the country has the capacity to import commercially about 288 700 tonnes of cereals. This leaves a deficit of 32 000 tonnes that needs to be covered by food aid. Taking into account the current WFP pipeline of 12 000 tonnes, there is still need of an additional 20 000 tonnes of external food assistance.

A combination of better though below normal domestic cereal production and improved commercial import capacity suggests that there will be no significant cereal shortages at the national level in the marketing year 2003/04. However, a key issue is the physical and economic access to food for certain segments of the population. High unemployment and inflation rates, particularly in the rural areas, coupled with the impact of HIV/AIDS on the labour force mean that certain population groups do not have the purchasing power to access food in the market and, therefore, will need food assistance.

5. FOOD SECURITY AND VULNERABILITY ASSESSMENT

5.1 Main factors determining rural food security in Lesotho

Most rural households in Lesotho access their food primarily through own production and purchasing from the markets. At national level Lesotho produces between 20 to 30 percent of its national food requirements and the rest is imported from South Africa. The national import capacity, combined with household purchasing power, plays a major role in determining the food security situation of the country. Frequent droughts and sharply declining employment opportunities combined with increasing staple food prices have significantly reduced rural households' access to food in recent years. For example between 1991 and 2001, the number of Basotho working in South Africa has declined from 122 000 to 60 000. On the other hand, agricultural production in the last three years has been significantly below average production for the country. The 2002/03 food crisis in Southern Africa has caused food prices to rise dramatically in Lesotho and has eroded the purchasing power of many households. A comparison in December 2002 of cereal prices in the other five countries affected by regional food crisis (Malawi, Mozambique, Swaziland, Zambia and Zimbabwe) showed that Lesotho has the highest cereal prices. Although crop production improved throughout the country, this year compared to last year, production is still below the five-year

The greatest threat to food security in Lesotho, however, is HIV/AIDS. According to the latest report on the global HIV/AIDS epidemic (UNAIDS, Dec 2002) HIV/AIDS prevalence among adults (aged 15-49) in Lesotho is 31 percent. The Lesotho Vulnerability Assessment Committee (LVAC) in the December 2002 Emergency Food Security assessment, which used chronic illness as a proxy for HIV/AIDS, found that 23 percent of all the households sampled had a chronically ill member. Out of a population of 2.2 million people, there are approximately 73 000 orphaned children, most of whom have lost parents to HIV/AIDS . It is estimated that by 2001, 25,000 Basotho had died of HIV/AIDS.. This trend is increasing and will have a long lasting impact on food security. HIV/AIDS is affecting negatively both the agricultural sector and off-farm labour as well as the rural demographics. Reports of a rising number of child farmers as well as households that can not plant due to lack of labour are increasing. At the same time migrant labourers have the highest HIV/AIDS infection rates. The problem of HIV/AIDS is affecting every districts with serious consequences, including:

- Reduced household and community capacity to produce food;
- Stripping households and communities of valuable labour power and reducing remittances from working family members;
- Increased household expenditure on health care for the critically ill and funeral expenses;
- Increased burden of child support by single mothers and grandparents; and
- Increased number of orphans and child headed households

In short, HIV/AIDS, combined with decreasing employment opportunities and more frequent drought conditions, is undermining the livelihoods of rural communities across Lesotho.

5.2 Review of emergency food aid in 2002/2003

WFP is currently implementing an emergency operation (EMOP) in Lesotho to support the drought affected people as well as other vulnerable households including those affected by HIV/AIDS. The WFP country office has been providing food to the most food insecure districts of Buthabuthe, Mohale's Hoek, Quthing, Qacha's Nek, Mafeteng, Thaba Tseka, Mokhotlong and Maseru rural. In addition, WFP has been supporting emergency school feeding in Leribe and Berea districts. WFP has distributed a total of 30 000 tons of food, reaching 357 000 beneficiaries at the peak of the lean period.

In addition to the general food distribution, complementary activities that were started in January 2003, were designed to provide vulnerable group feeding to 28 140 beneficiaries who were identified through Mother Child Health (MCH) and social services networks.

This project has been providing dietary support to extremely vulnerable children under five years of age. Furthermore, food assistance has been extended to 29 380 people living with HIV/AIDS and their families, primarily through home based care programmes and community-based care systems. HIV/AIDS support activities have been undertaken in hospitals and health centres in collaboration with NGOs that have expertise and experience in the areas of HIV/AIDS awareness and prevention programmes, such as CHAL and World Vision, with the support of UNICEF and UNAIDS.

5.3 Household food security outlook for 2003/04

The food situation will remain critical for a large section of the population due to increasing HIV/AIDS infection, rising unemployment rates and reduced agricultural production. As a result many poor rural households will continue to have limited access to resources and food. The mission findings indicate that overall, 2003/04 is slightly better than the previous two years in terms of food availability, for the following main reasons:

- Better harvest in particular the 2002 winter wheat.
- Anticipated lower cereal prices as currently prices in South Africa are much lower than at the same time in previous years.
- Higher livestock and wool prices will improve cash income for households on the highlands where current livestock conditions are favourable.
- Stronger currency (Rand) which may improve the importing capacity of the country as well as the purchasing power of those who have access to money.

However many households continue to have inadequate means and resources to access or buy food. In the absence of functioning national safety nets or a welfare system targeted food aid will be necessary to meet

the nutritional requirements of households who otherwise will not have access to food. This will include: HIV/AIDS affected households; households that are heavily dependent on own production and affected by a complete crop failure; households that have neither livestock nor off-farm income..

5.4 Relief food aid requirements in 2003/2004

The mission estimates that 125,000 people will need food assistance starting from July to a peak of 270 000 people from January to March 2004, with a total emergency food aid requirement of 32 000 tonnes of cereals. Table 8 summarizes food aid needs for the period April 2003 to March 2004. Households affected by crop failure and those affected by HIV/AIDS are the priority groups for food assistance. The VAC assessments, which have been recently completed, will further clarify food aid needs by food economic zone and socio-economic groups and will provide indicators for targeting HIV/AIDS affected households without stigmatising them.

Given the sensitivity associated with HIV/AIDS innovative and new approaches of targeting must be used. It is also important to use different modalities of assistance that could capture the food needs of the affected households. This could include: school feeding with take home rations, MCH, orphans and households headed by children and others identified as appropriate. The assistance for HIV/AIDS affected households will be implemented in all of Lesotho's 10 districts.

Table 8. Number of People Requiring Food Assistance (2003-04)

Time Period	Population in Need of assistance	Cereal Needs in MT
April-June 03	250 000	9 000
July-Sept 03	125 000	4 500
Oct-Dec 03	270 000	9 720
Jan-Mar 04	270 000	9 720
July 03 – Mar 04	270 000	32 940

5.5 Food basket considerations

Special nutritional considerations must be made in preparing the food basket to meet the nutritional needs of people with HIV. Micronutrient deficiencies are believed to lead to the accelerated onset of AIDS and opportunistic infections leading in turn to earlier death with catastrophic consequences, especially for children left behind. Preliminary outcomes from recent technical consultations on the nutritional requirements of HIV infected people (Rome, May 2003) indicate a change from the previously advocated increased protein need to emphasis on improved protein quality. As this will be difficult to achieve in food aid rations in the absence of appropriate animal products, Food for Work (FFW) and Food for Training (FFT) projects will be aimed at promoting will small animal rearing activities so as to make animal and dairy products increasingly available at the household level.

In light of these nutritional considerations, WFP will continue to emphasize the importance of non-cereal food items in the food basket and the fortification of food aid commodities. In practice this translates into the following:

- Provision of a fortified blended food (such as CSB);
- Purchase of, and in-kind requests for, fortified maize meal;
- Milling and fortification of in-kind whole grain maize;
- In-kind requests for a variety of cereals such as sorghum and bulgur wheat so as to enable variation in cereal consumption;
- Potential enrichment of maize meal with soy flour (on trial basis).

6. LONG-TERM STRATEGY FOR SUSTAINABLE AGRICULTURAL DEVELOPMENT

The GOL support for farmers and agriculture by providing subsidised crop inputs and machinery is to be commended. However, there is an urgent need to reorient this approach and to look for alternative interventions, which can be more helpful to the farmer and at the same time be sustainable.

As presented in last year's FAO/WFP Special Report, agriculture in Lesotho, which has struggled for many years is currently facing a catastrophic situation. Crop production could cease altogether over large tracts of the country unless steps are taken to reverse soil erosion, soil degradation and the decline in soil fertility. The foothill and mountain areas are unsuitable for intensive cropping on the fragile and poorly structured soils and should concentrate on livestock production.

The physical soil conservation structures throughout the country originally designed and established when the soils were stable and of good quality, have deteriorated alarmingly and erosion has escalated as soils have become more leached, less structured and unable to hold moisture and support crop production. These terrace ridges/contours in use with the degraded soils now commonplace throughout Lesotho need to be constructed much closer together in order to deal with the increased runoff and erosion. However, this is a monumental task which would require massive funding. In addition, such physical runoff control measures can only be used safely and effectively in support of optimum soil management, together with better crop and livestock husbandry practices. Crop yields are in general very low because most of the cultivated soils have low levels of fertility, high acidity, low organic matter content and poor moisture retention capacities.

Maize and sorghum cannot continue to be mono-cropped year after year. Rotations, fallows and mixed, relay and inter-cropping practices with leguminous (particularly) and other crops must become part of the farming system. In 2002, the Mission visited an area of land (15 hectares) in Berea District, originally earmarked for an irrigation scheme. The scheme did not materialise, but the land had been under lucerne/fallow for three years; it was planted to maize and sorghum for that season by a number of individual small farmers. The resultant crops were infinitely better than anywhere else in the country; estimated yield for the maize was 6.5-7 tonnes/ha and for the sorghum 4-5 tonnes/ha. This also compared with maize variety trials conducted under good management nearby, with estimated yields of only 2-2.5 tonnes/ha (one third of the yield), and local farmer yields of 0.4-0.5 tonnes/ha (one fifteenth of the yield). The mission returned to the same area this year and estimated maize yields had fallen to 2.5-3 tonnes/ha and sorghum yields to 1.5-2 tonnes/ha. Next year yields will fall still further, unless rotations and sustainable corrective practices are implemented.

The concept of an enriched fallow (containing legumes) in the crop rotation cannot be overemphasised. Farmers should be encouraged to produce a good grain crop each year on a portion of their land, utilising the best crop husbandry techniques available. After harvest, a suitable fallow/forage or grain legume crop should be established to help improve soil fertility, soil structure and soil moisture retention capacity, whilst the next food grain crop is grown on another portion of land in the same rotation.

As recommended in the Soil Fertility Initiative Document, prepared for Lesotho by FAO (1999), what is needed is a comprehensive integrated and participatory approach that takes advantage of synergies of practices at field level, offering production, economic and conservation benefits. This approach would emphasise building of soil organic matter levels through proper use of inorganic fertilizers, manure and ash, coupled with intercropping of improved cereals and legumes, conservation farming and agro-forestry practices. The overall benefits are the improvement of soil structure and fertility, food security, cash incomes, dietary diversity and protection of the environment. The improved soil structure and fertility result in increased efficiency in plant nutrients uptake and water storage, thus enhancing the profitability of crop production as well as enabling crops to withstand dry periods and drought.

Another major issue is that the majority of farmers around the country are unable to follow any of these initiatives or improve their crop husbandry practices, because they are isolated and lack proper advice. Agricultural extension workers very rarely visit to offer agronomic advice except for maize or demonstrate new techniques for farmers. The agricultural extension service in the villages is totally inadequate – poorly informed about rotations and alternative crops, very understaffed, lacking in motivation and short of transport.

Possible future FAO technical assistance to develop agriculture in Lesotho

The following important initiatives were presented in the last year's report:

- Land Tenure Reform
- Watershed Management
- Conservation Agriculture Technology
- Improved seed production and assistance for the livestock sector

As far as the mission has ascertained, there has been no start made on any of these issues.

To these interventions should be added the following:

Education/training (dissemination of information): Farmers all around the country cannot improve their crop husbandry practices because they lack proper advice. Extension workers attached to District Agricultural Offices are not well informed about alternative crops, crop rotations and the latest technologies and crop husbandry practices and cannot advise farmers correctly. Demonstration farms (3-5 ha) should be developed in each of the ten districts in Lesotho, with demonstration plots (0.5 ha) in as many areas as possible within each district. These units should be used to introduce sustainable farming concepts (rotations with grain and forage legumes, inter-cropping, mulching, manuring) for improved crop, soil and rainwater management to farmers and extension workers. Visual impact is all-important; farmers need to see the benefits and advantages for themselves and extension workers need to have concrete and proven technologies to present to their farmers. Once the soil, the deteriorating and finite resource for agriculture in Lesotho is returned to health, farmers will be able to produce more maize from a smaller area, rotate with other crops and have a sustainable system for the future.

An incentive scheme to encourage farmers to grow alternative crops to maize/grain crops:

Reconsider the input subsidy scheme for maize, and instead introduce suitable incentives to encourage farmers to grow crops other than maize in their farming systems. Farmers should be encouraged with these incentives, to plant a third of their arable area to a suitable grain/forage legume each year. In this way a regular rotation of crops will be introduced, and it will become abundantly clear that the same quantity of maize can be produced with a higher yield from a much smaller area. This crop diversification will broaden their farming base and open new marketing outlets for their produce, as well as allowing an integrated system for livestock production to develop.

Improved market outlets and the development of agricultural processing industries: The GOL should encourage farmers to move away from their largely subsistence farming approach, and into the production of saleable off-farm products to generate a cash income. The development of agricultural processing industries will be an important part of this strategy, for instance.

Potatoes grow extremely well in such areas as Qacha's Nek, but marketing is a huge problem. If a potato chip factory were established there with GoL assistance, a useful industry could be started. Employment opportunities would be created in the area and a dynamic integrated system for groups of farmers would develop.

Sunflower and soya beans both grow well in Lesotho, but have no market in the country. If a factory were built for extracting vegetable oil from these two crops, farmers would be encouraged to grow them. Employment opportunities would be created, and apart from the vegetable oil, useful protein-rich cakes for livestock would be produced.

This report is prepared on the responsibility of the FAO and WFP Secretariats with information from official and unofficial sources. Since conditions may change rapidly, please contact the undersigned for further information if required.

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