

SPECIAL REPORT

FAO/WFP CROP AND FOOD SUPPLY ASSESSMENT MISSION TO CÔTE D'IVOIRE

24 March 2004

Mission Highlights

- The overall picture emerging from this assessment unmistakably reflects a deepening crisis in poverty and food insecurity. The potential for change in 2004, for better or for worse, will be great, so that *regular monitoring* of people's access to agricultural inputs and markets, as well as their health/nutritional status, will be critical.
- Compared to the five-year average before the current crisis, food crop production in Côte d'Ivoire will register a substantial decline for 2003, ranging from 6–9 percent for plantains and tubers, 15 percent for rice, 16 percent for maize, 23 percent for sorghum and 27 percent for millet.
- Major cash crops present a similar pattern, and exports of cocoa beans, coffee and cotton are forecast to drop by 14 percent, 29 percent and 25 percent respectively, compared to 2002.
- Conflict-related problems, notably population displacement, labour scarcity, excessive transport costs and insecurity and concomitant market fragmentation in commodity trading, are among the major causes of this agricultural decline.
- Cereal import requirements for 2004 are estimated at 1.4 million tonnes, of which about 1.2 million tonnes would be obtained on commercial terms leaving about 184 000 tonnes to be met through external assistance. As currently known food aid pledges amount to about 50 000 tonnes of cereals, the remaining gap -134 400 tonnes - needs to be closely monitored by the Government and international community for additional food imports. It should be noted that comprehensive and reliable data is not available for the entire country, as a result of the crisis, and as such the gap will need to be periodically updated as and when information becomes available.
- The farming communities the mission met in the war-affected areas are in urgent need of rice and maize seeds and basic agricultural implements, including animal traction where applicable.
- Lasting solutions to land tenure and migrant worker issues must be found in order for agriculture in Côte d'Ivoire to thrive anew.

1. OVERVIEW

In response to a request from the Government of Côte d'Ivoire, FAO and WFP undertook a Crop and Food Supply Assessment Mission (CSFAM) to Côte d'Ivoire from 15 November to 12 December 2003. The purpose of the Mission was to analyse the food supply situation in the prevailing socio-economic context, assess existing marketing arrangements for major crops, appraise crop growing conditions in 2003, prepare a supply/demand balance for staple foods during the 2004 marketing year and make recommendations as appropriate for the rehabilitation of the agricultural sector.



FOOD AND AGRICULTURE ORGANIZATION OF THE UNITED NATIONS, ROME



WORLD FOOD PROGRAMME, ROME

The Mission was assisted by national consultants and by staff from the Ministry of agriculture and the Ministry of animal and fisheries production. Besides briefings at these ministries, the Mission visited other government departments, namely the ministries of trade, economy and finance, solidarity and social security. Work sessions were also held at UNDP and World Bank representations and the regional central bank (Banque centrale des États de l'Afrique de l'Ouest). Field trips, during which farming communities, traders, senior staff of agro-industries and officials were met, were conducted from 18–28 November and 9–12 December 2003. The areas visited included Yamoussoukro, Daloa, Bouake, Sakassou in the transition zone; Korhogo in the north; Man, Touba, Guiglo, Bin-Houyé, Grabo and Tabou in the west and southwest; and Bondoukou and Bouna in the northeast.

Information collected was used to appraise the country's current agricultural situation and prospects for 2004. Conflict-induced problems, notably massive population displacements that have produced acute labour shortages, the lack of agricultural support services in parts of the country under the *Forces Nouvelles* (FN), market segmentation and disruptions from insecurity and excessive transport costs resulting from the hefty levies at roadblocks, are all factors that have severely affected agricultural production in 2003. It is estimated that, compared to the average for the five years preceding the crisis, rice production will decline by about 15 percent, maize by 16 percent, millet and sorghum by 23–27 percent, yams by 9 percent, cassava by 6 percent and plantains by about 6 percent. Likewise, cocoa bean exports are forecast to drop by 14 percent, coffee beans by 29 percent and cotton yarn by 25 percent compared to 2002. Small ruminant production, pig and poultry farms and fish ponds have been wiped out in war-affected areas. Cattle in the north have largely been spared, but the regular animal health programme, which includes vaccination campaigns, animal quarantines and meat hygiene, has virtually ground to a halt from lack of facilities and trained personnel.

To reverse the decline in cereal production, provisions of quality seeds of rice and maize and essential farm implements are urgently needed, not only in the war-affected areas in the west and southwest, but also in the transition and northern zones where cotton companies have ceased providing support to crop production. Farming families need a programme that should include an enhanced extension service backed by the resumption of seed multiplication.

For cash crops such as cocoa, coffee and palm oil, the most serious problem is labour scarcity, which is linked to issues related to land tenure and migrant workers who have been compelled to leave the country. While the search for lasting solutions to these problems is currently top priority for the government and its development partners, the indigenous communities visited by the Mission favoured the return of migrant workers under mutually agreed conditions supported by the local administration.

In the medium to long term, aging cocoa farms will need to be replanted. Varieties resistant to stem borer will also have to be adopted to boost sugar cane production. Staff training will be required in this area.

To allow efficient flow of agricultural produce to consuming areas, unnecessary roadblocks must be removed and security ensured across the transport network. Feeder roads must also be regularly maintained.

Steps must be taken to conduct animal vaccination campaigns and to restore veterinary services in areas under rebel control. The rehabilitation of livestock production and fisheries in areas where they have been devastated should be a high priority, with adequate funding. And for the agricultural sector as a whole, a formal credit system is needed.

Although the effects of the increasingly precarious food situation are not yet apparent in most segments of the nation's population, a food security monitoring unit has been set up along the lines of a project document prepared by WFP in February 2003.

2. SOCIOECONOMIC CONTEXT¹

2.1 Macroeconomic setting

The political crisis that has plagued Côte d'Ivoire since 1999 has had a devastating effect on its economy, once the beacon of prosperity in sub-Saharan Africa. While the country was well into a recovery phase spurred by the devaluation of the CFAfr in 1994, with GDP growth rates averaging 5 percent in subsequent years, the December 1999 coup d'état triggered a sharp economic decline, as the GDP growth rate plummeted from 4.7 percent in 1998 to 1.6 percent and -2.5 percent in 1999 and 2000 respectively. The slight improvement in growth in 2001 (0.5 percent) was followed by a 1.8 percent contraction in 2002, mostly as a result of the September 2002 military uprising and the ensuing political stalemate, which has kept the country partitioned into a government-controlled southern zone and a northern area occupied by former rebels (FN) since the LINAS-Marcoussis accord in February 2003. Delays in implementing this accord, which is intended to solve the political crisis, have hampered the restoration of the enabling environment needed to reverse economic deterioration. Indeed, GDP growth estimates for 2003 are generally in the negative: -1.9 percent according to the regional central bank (BCEAO) to around -4 percent according to the World Bank. Only the Economy and Finance Ministry believes a 0.5 percent growth rate could still be achieved in 2003.

The declines in GDP reflect the poor performance of key economic sectors hit by the crisis. Thus, after having attained an average annual growth rate of 3.4 percent in the 1990s, the agricultural sector posted 0.5 percent growth in 2001 and 2.6 percent contraction in 2002, mostly from shortfalls in the production and export of such crops as coffee, cotton, palm products and, to a lesser extent, cocoa. Likewise, industrial output shrank by 4.2 percent in 2001 and 3.2 in 2002; the central bank foresees a 5.6 percent decline for the sector over the first ten months in 2003, while quarterly data from the National Institute of Statistics point to a 12–14 percent dive by year's end. Once the fastest growing sector in the 1990s with 7 percent average annual rates, services posted a modest 2.1 percent growth in 2001 and a 1.2 percent contraction in 2002. Although officials in the Ministry of Economy and Finance believe the sector decline will be only 0.4 percent in 2003, the central bank maintains that this sector is among the most devastated by the crisis, as many jobs have been lost along with their purchasing power, particularly in tourism, transport and trading.

Contrasting with this downward trend is the mining sector which, according to the central bank, is expected to post 26 percent growth in 2003 thanks to the tapping of new oil fields and gas reserves. Crude oil exports amounted to US\$151 million in 2001 and US\$155 million in 2002. But these exports are still dwarfed by traditional commodities such as cocoa that brought in about US\$1.8 billion in 2002.

The consumer price index remained below a monthly average of 4 percent over the January–October 2003 period, curtailed by the stringent monetary policies of the central bank, a regional institution which manages the West-African CFAfr common to six other countries. But this overall index should not overshadow specific situations that prevail in some locations as result of the war. At the time of the Mission, prices of agricultural products tended to be more depressed in areas under the FN than in the government-controlled areas of the country. In the former, the banking system has ceased to function and a lack of liquidity is crippling farmers, traders and officials alike. Moreover, with the *de facto* partition of the country, government employees were requested to leave areas under the FN and move to Abidjan until the crisis is resolved. This has left these areas with little purchasing power, while concentrating the available effective demand in Abidjan where higher prices for local food items were noted. These items remain in short supply in Abidjan as a result of the war and the continuing political stalemate.

Because the CFAfr is pegged to the euro (656.0 CFAfr = 1 euro) and the euro has appreciated by nearly 20 percent against the dollar in 2000/03, Côte d'Ivoire exports have become less competitive, particularly in the non-euro zones. Thus, even when world cocoa prices quoted in US dollars remained high in 2003 (averaging 79 US cents per pound compared with 80 US cents in 2002), the farmers and cocoa traders complained about lower prices in local currency. The recommended farm gate price for the 2002/03 season was 625 CFAfr/kg compared with 350 CFAfr/kg in 2003/04. But because of the various unofficial levies at roadblocks and the high costs of transport, actual farm gate prices for cocoa have ranged from 200 CFAfr/kg to 250 CFAfr/kg. At such prices, farmers said they could hardly afford to pay labourers to work their cocoa farms.

¹ Data in this section come from a variety of sources, including documentation from the Ivorian Ministry of Agriculture, Ministry of Economy and Finance, Ministry of Commerce, Banque centrale des États de l'Afrique de l'Ouest (BCEAO), the World Bank and UNDP.

Despite the economic decline described above, Côte d'Ivoire has managed to achieve positive balances in its current account in 2001 (US\$928 million) and 2002 (US\$2 090 million), as well as relatively healthy total reserve positions: US\$729 million and US\$870 million, respectively. The country's total debt has been about US\$16 billion for two years now, and the debt service/exports ratio decreased from around 20 in 2001 to 15 in 2002, a level normally deemed manageable for debt repayment. In fact, Côte d'Ivoire has so far honoured its debt-service commitments in line with the Paris Club agreement of April 2002.

The government's fiscal discipline has helped achieve a comfortable budget position, with estimated budget deficits of 0.9 percent of GDP in 2001, 1.1 percent in 2002 and 0.4 percent in 2003. These results stem mostly from a lack of capital spending and from the fact that government services have not yet resumed in the areas occupied by the FN. It is worth emphasizing that domestic investment dropped by 24.7 percent in 2001 and 4.4 percent in 2002, a phenomenon that has been accompanied by business closures and loss of employment on a massive scale, particularly in the areas under the FN. Concerning poverty, there are fears that the economic decline in 2003 as estimated by the central bank or the World Bank Group has further worsened poverty incidence, which had already increased from about 34 percent in 1998 to 38 percent in 2002 (before the September 2002 military uprising and the ensuing economic disruptions).

The government and the central bank, as well as the World Bank Group, forecast a modest positive growth of around 1 percent in 2004, predicated on a fruitful reconciliation process that would put and end to the crisis and restore government authority and services over the entire country. These indeed are the main priorities for the government as well as for international organizations. The implementation of the donor-sponsored Poverty Reduction Strategy Paper was to commence in late 2002, but has been on hold because of the lingering political stalemate. It is expected to be updated and presented at a donors' conference once the conflict has been resolved. Meanwhile, the humanitarian situation of the many thousands who have lost their livelihoods as a result of the crisis may remain critical in 2004 if they are not given the means to restart their trades and recover their purchasing power. For farmers with access to land, this would mean facilitating access to the needed seeds, fertilizers, spray chemicals and basic tools (including animal traction where required). The removal of unnecessary roadblocks and associated illegal levies will have an immediate beneficial effect on farmgate and consumer prices alike.

2.2 Performance of the agricultural sector

Agriculture has long been the mainstay of Côte d'Ivoire's economy. In 2002 for example, agriculture accounted for 25.7 percent of GDP and for about 60 percent of export earnings, and it employed some 68 percent of the labour force. The country covers 322 460 km², 75 percent of which is deemed suitable for agriculture; however, only 30 percent is actually cultivated. There are three agro-ecological zones including the coastal tropical wetlands, the relatively dry northern area and a transition zone between the two; a wide range of crops can be produced in the country because of this geographical diversity.

However, as noted above, the lingering crisis has adversely affected key production sectors of the economy including agriculture. Indeed, the Mission observed that all rural communities have been affected, albeit in varying degrees. Thus, communities that have been under government control throughout the crisis have generally been able to achieve normal levels of agricultural production as they have had access to the needed inputs and government support services. However, it was pointed out that scarce farm labour has been a major constraint, particularly during land preparation in February and March 2003, when young farm hands in some areas were on the front of the conflict to protect their communities or neighbouring villages from rebel attack. Communities in FN-controlled areas have also been in a position to maintain agricultural production, although in general they have had to place more emphasis on food crops than on export crops, and have had to work without purchased inputs or support services. This is particularly the case for cotton producers in the northern part of the country, most whom have not yet been paid for their 2001/02 cotton crop.

Particularly hard hit are communities directly located in combat zones or that were simply overrun by elements of the warring parties: inhabitants had to flee, leaving behind property that was looted or destroyed; often the entire 2002/03 planting season was missed. Cocoa, coffee and palm holdings went unattended, yielding very small harvests for the 2003/04 season. Farmers interviewed by the Mission in the western and southern regions said that except for some cassava, they had no food crops to harvest and their export crop production would drop by 30–50 percent in 2002/03. This situation is also reflected at national level, particularly concerning export crops. Thus, cocoa production, for which Côte d'Ivoire holds

first place worldwide with 1.2 million tonnes and 40 percent of the world market in 2002, may decline by around 130 000 tonnes in 2003 according to the central bank. The Coffee-Cocoa Bourse in Abidjan reckons that there will be only about 470 000 tonnes of cocoa ready for shipment by the end of December, compared with 675 000 tonnes for the same period last year. Coffee bean exports are forecast to shrink to about 106 000 tonnes by year's end from an estimated 147 840 tonnes in 2002. Likewise, cotton exports are predicted at 103 146 tonnes in 2003 compared with 137 528 tonnes in 2002. A senior representative of the cotton industry in Abidjan told the Mission that the three major cotton companies – Compagnie Ivoirienne pour le Développement des Textiles (CIDT), Ivoire Coton and Compagnie Cotonnière Ivoirienne (LCCI) – have decided to curtail by some 90 000 ha the cotton area in the northern zone beginning with the 2003/04 season. In addition, these companies have terminated their 200 million CFAfr programme in support of food crop production by cotton farmers. The programme involved the production and distribution of improved maize and rice seeds.

Exporters of crops such as cotton and coffee have had to deal with these and other problems, notably sagging international prices; their woes have also been exacerbated by the high transport costs and insecurity associated with the crisis. Companies like LCCI said their warehouses in the cotton-producing area had been looted at gunpoint and that truckloads of cotton were being confiscated and diverted for sale in Mali or Burkina Faso.

Flocks of small ruminants, pig and chicken farms and fish ponds have been wiped out in the war-affected areas. In the southern zone under government control, animal production is being hampered by the lack of maize and cotton cake that used to come from the central and northern parts of the country. Although the cattle subsector in the northern region has been spared major setbacks during the crisis, the regular animal health programme, which includes vaccination campaigns, animal quarantines and meat hygiene, has not been carried out because facilities have been ransacked and the qualified personnel have retreated to the government-controlled south since the rebellion began.

Likewise, agricultural research and extension facilities in combat zones and areas occupied by the FN have been looted or destroyed, implying that redeployment of government staff in such areas will have to be supported by new investments in construction and equipment, as well as animal and plant stock where required.

Climatic factors often aggravated war-induced problems in agricultural production in 2003. In parts of the transition zone and northern region, the rains came late at planting time (February–April) and extended beyond the beginning of the dry season (late November). Thus land preparation proved to be more difficult and plant growth was stunted at the beginning of the season, while part of the cereal harvest was damaged by protracted rains.

2.3 Farm labour and land tenure issues

Since the nineteenth century Côte d'Ivoire has depended on migrant labour mostly from Burkina Faso and Mali for agricultural production, particularly in the export crop sector. There are large numbers of these non-Ivorian migrant workers, or *allochtones* as they are known, many of whom have been in the country for generations; they are claiming the land they work. This issue, along with the related problem of giving them Ivorian nationality, has triggered the present crisis, provoking xenophobic reactions in many communities. As a result, many of the migrants who fled to their countries of origin have not yet returned to their farms or previous occupations. Hence the acute labour shortage noted in the communities visited by the Mission in the cocoa, coffee and palm oil producing areas of the centre, west and south of the country. Some of the farm owners that met the Mission said that before the crisis they were employing up to five workers on a regular basis, but that they couldn't afford even one at present. The few labourers that could be found had become too demanding, requesting to keep from half to two-thirds of the crop when they worked a full season for a farm owner, compared with one-third previously.

If the crisis has accomplished anything positive, it would be that the indigenous population has realized just how important the migrants' economic contribution was for their communities and for the entire nation. This is particularly evident in areas such as Tabou prefectorate in the southwest, where over 80 percent of cocoa plantations are in the hands of the *allochtones*, who also normally provide most of the labour on palm and rubber plantations. As xenophobia is subsiding in most places following initiatives for reconciliation at the political level, the indigenous population wants the migrants to return, although not necessarily those who lived there prior to the conflict, and definitely not those who have committed crimes against the community.

Conditions for the return of migrants as well as of *allogènes* (i.e. Ivorians farming land in a region that is not their birth place) must ensure that long-lasting mutual trust and security for both the workers and the host indigenous community will prevail. To achieve this, a participatory process involving all parties is needed, with consultations and conclusions supported by the local administration. It must, however, be ensured that this approach, which is proving successful in Tabou prefectorate as a stopgap measure at the very least, is not at odds with the National Land Policy published in 1999.

Côte d'Ivoire has long been the economic powerhouse for the West African CFAfr zone, accounting for 40 percent of its GDP. The present crisis helps underscore not only the interdependence of the country's own regions, but also how far the economic integration with neighbouring countries had advanced before the September 2003 military uprising, particularly in the areas of transport, trading and the labour market. Return to a normal state of affairs in Côte d'Ivoire is thus urgently needed for its people and for the West African subregion as a whole.

3. AGRICULTURAL PRODUCTION

3.1 Crop growing conditions

3.1.1 Agro-ecological zones

Côte d'Ivoire can be divided into three major geographical zones: Guinean (50 percent), Sudano-Guinean (19 percent) and Sudanese (31 percent).

- The Guinean zone in the south receives the most rainfall and includes practically all of the forested lands. There are typically four seasonal variations: a long dry period (December to March), a long rainy season (March to June), a minor dry season (July to August) and finally a minor rainy season (September to November). Annual rainfall generally exceeds 1 800 mm.
- The Sudano-Guinean zone is a transition area between the forests and the north. There are four seasons: a long dry season (November to February), a long rainy season (March to June), a minor dry season (July to August) and a minor rainy season (September to October).
- The Sudanese zone is furthest to the north. Less rain falls here than elsewhere in the country, and there are only two seasons: a brief rainy period and a very long dry period. Savannah vegetation predominates.

3.1.2 Means of crop production and inputs

According to a release from the National Centre for Agronomic Research (CNRA) in March, entitled "Current situation in the agricultural sector and prospects for development", 86.9 percent of all farms utilize family labour. Agriculture is essentially manual; animal traction is used on only 4.4 percent of fields, mostly in the north. Fewer than 1 percent of farms possess tractors or motorized cultivators; 8 percent, sprayers. The same source has indicated that fertilizer is used on 18 percent of fields, of which about 14 percent is chemical fertilizer. The CNRA has estimated that 40 percent of farms raise livestock, usually following traditional methods.

3.1.3 The 2002/03 growing season

It was observed that the rains began later than usual in some areas; nevertheless the overall climatic conditions and production systems remained basically the same as for the previous season. The onset of armed conflict in September 2002 produced negative effects on crops and harvests depending on the administrative region affected. A number of phenomena were observed: harvests abandoned in the middle of the fields because of insecurity conditions; grain storage areas looted; small livestock and poultry decimated; loss of goods; destruction of habitat along with other social or economic infrastructures; cessation of banking, loans or savings activities in the war zones; difficult circulation of merchandise from harassment at multiple roadblocks. In the zones under rebel control as well as along the front of the buffer zone, only proximity farming activities can be carried out because of insecure conditions. The country can be divided into five main zones according to the displacements of the population and how much, and under what conditions, agricultural activity is being carried out.

Areas of the Northern zone occupied by the Forces Nouvelles (FN; "New Forces"), ex-rebels

- administrative and technical assistants have left the region for the central administration in the south;
- the cotton companies, which are the largest source of income for agricultural activity in the region, have accumulated outstanding payments for cotton purchases from preceding seasons, and farmers in the cooperatives could not be supplied with agricultural inputs on a normal schedule;
- rural communities have been deserted by their most able people and they lack the necessary technical assistance;
- most of the youth have joined the rebellion and are thus unable to work in the fields.

Buffer zone, under government control

- large concentration of displaced populations – rural populations in particular – in all areas;
- strong pressure on food reserves and even on seed stocks;
- harvests are under way, depending on accessibility to fields;
- agricultural assistance from the government (programme "Rice for all"; programme for maize; etc.), from United Nations agencies and from NGOs.

Southern zone, under government control

- farm population still mostly in place;
- arrival of displaced persons from all other regions;
- pressure on food reserves and even on seed stocks;
- normal technical assistance activities;
- agricultural assistance from the government (programme "Rice for all"), from United Nations agencies and from NGOs.

Areas of the Western zone under FN control

- repeated violent armed attacks with massive displacements of population;
- very late returns of populations (even after May 2003);
- very difficult resumption of production activities;
- spread of the conflict between communities, especially in the region of Moyen Cavally, which resulted in renewed displacements of migrants and indigenous population in the second half of 2003.

Southwest zone, currently under government control

- some villages have been repeatedly attacked;
- presence of Liberian refugee populations;
- very little resumption of agricultural activity;
- migrant population has been displaced, abandoning fields and crops;
- significant lack of labour for both industrial plantations and food-producing fields.

3.2 Crop production for 2002/03

Planted areas of crops by region have been estimated from 2001 national agricultural census data. Production figures, to which trend factors have been applied, come from FAO and government sources. These trend factors take into account the relative importance of a given region with respect to the area planted to a particular crop. The production loss/increase for this crop in the region as stated by farming communities and key informants was then weighted to derive the overall loss/increase at the national level in percentage terms. Almost all harvest estimates for this year show a decrease in production from last year (see Table 1).

3.2.1 Food crops

Food crops developed normally, but the harvest period was heavily disturbed by armed conflicts in September 2002: farms could not be tended properly because of massive population displacements and insecurity.

- *Rice*. Total crop loss for 2003 has been estimated at 13 percent compared with 2002, as more than 60 percent of the areas cultivated to rice are in combat zones or areas where the population has fled. Rice is grown in the regions of Savanes (which contains 23 percent of areas cultivated), Montagnes, Moyen Cavally, Worodougou, Bafing and Denguele, which are entirely under FN control. Agricultural population displacements have affected the regions of Montagnes and Moyen Cavally for a longer time. Many farm labourers in the region of Savanes have been enlisted in the FN; all fieldwork was thus abandoned. Harvests were not completed; there were also losses from bird pests, rot, etc.
- *Maize*. The large maize-producing areas are located in the north, which is under FN control, especially in the regions of Savanes (with 62 percent of the country's maize cultivation), Denguele, Worodougou, Vallée du Bandama, Zanzan and part of the Haut Sassandra. Losses in the maize harvest may be estimated at 11 percent compared with last year. The main causes of these losses are lack of labour or insecurity; crops were sometimes just abandoned to rot in the fields.
- *Millet*. Almost the entire millet crop comes from the north of the country. Some 95 percent of this crop is harvested in just three regions: Savanes (80 percent of cultivation), Zanzan and Denguele. All are under FN control. Losses have been estimated at 21 percent compared with the 2002 season.
- *Sorghum*. More than 83 percent of the country's sorghum is cultivated in the two regions of Savanes and Zanzan. Population displacements and the departure of youth to join the ranks of the militia explain harvest losses for this year, estimated at 20 percent over last year.
- *Yams*. The transition zone in the south constitutes the largest area cultivated in yams. The regions of the Vallée du Bandama, Lacs and Agnéby represent more than 50 percent of the areas cultivated to this crop. Vallée du Bandama has been seriously affected by the war, but in general yam production has not suffered extensively because the harvest is staggered, and to some extent the crop keeps relatively well. Still, rot as a result of poor storage conditions losses may be estimated at 7 percent in comparison with the 2002 harvest. The Zanzan area (Bondoukou), being isolated for a longer period may have had losses of up to 50%.
- *Cassava*. Most of the country's cassava is produced in the south and west. The regions of Lagunes, Vallée du Bandama, Bas Sassandra, Sud Comœ, and Montagnes contain practically 80 percent of the areas cultivated. The cassava harvest was not significantly affected by losses. As populations return to their villages, they harvest and consume their cassava or else sell it where this is possible. Some losses (about 5 percent) from crops that rotted in the fields may be estimated with respect to the 2001/02 harvest.
- *Groundnuts*. Groundnuts are produced in Savanes (72 percent of the country's output), Denguele, Worodougou, Bafing and N'zi Comœ; these areas account for more than 95 percent of areas cultivated. There was not much loss for this crop. A few late harvests were affected by rot or germination in the field; these losses may be estimated at 5 percent compared to the 2002 crop.
- *Plantains*. Plantain (bananas) are produced mostly in the regions of Agnéby, Lacs, Vallée du Bandama, Sud Bandama, Lagunes, Moyen Comœ and Haut Sassandra; harvests are staggered. There were not many losses; nonetheless, there was some loss from rot and lack of maintenance (representing about 5 percent less than last year's harvest).

Table 1. Côte d'Ivoire: Production of selected food crops, 1998–2003 (in '000 tonnes)

	1998	1999	2000	2001	2002	2003	Average 1998–2002	03/02 (%)	03/average (%)
Rice	938	976	1 036	1 055	976	847	996	-13.22	-14.96
Maize	605	675	631	615	587	523	623	-10.90	-16.05
Millet	80	76	75	73	69	55	75	-20.29	-26.67
Sorghum	32	30	30	31	30	24	31	-20.00	-22.58
Yam	2 921	2 944	2 950	2 938	2 874	2 674	2 925	-6.96	-8.58
Cassava	1 692	1 681	1 691	1 688	1 658	1 576	1 682	-4.95	-6.30
Plantain	1 410	1 402	1 418	1 410	1 395	1 322	1 407	-5.23	-6.04

Sources: FAO data base (1998–2001), Mission estimates (2002–2003).

3.2.2 Export crops

Agricultural exports have been the main engine of growth for Côte d'Ivoire, accounting for about 60 percent of export revenues. The main export crop is cocoa, for which Côte d'Ivoire ranks first worldwide among producing countries, with 1.2 million tonnes in 2002 representing 40 percent of the world supply. Other cash crops include coffee, cotton, rubber, cashew nuts, coco nuts and sugar cane. Table 2 shows trends in crop exports. Cocoa bean exports are forecast to drop by 142 347 tonnes or about 14 percent in 2003 compared to 2002; coffee bean exports by 42 212 tonnes or 29 percent; and cotton yarn by 34 382 tonnes or 25 percent.

- **Cocoa.** According to the 2001 national agriculture census, 1 777 550 ha of cocoa (over 99 percent of all planted areas) are cultivated in the following regions: Bas Sassandra (30 percent of the country's crop), Haut Sassandra, Sud Bandama, Agnèby, Moyen Comœ, Moyen Cavally, Fromagers, Lagunes, Marahoue, Lacs, Montagnes and N'Comœ; remaining regions produce less than 1 percent. The prevailing insecurity has hampered the cocoa harvest, particularly in the southwest, which has suffered a massive departure of labourers from Burkina Faso and Liberia. The Vavoua prefectorate in the Haut Sassandra has literally been deserted; access to farms remains difficult because of insecurity. Many of the farmers who have abandoned their farms are now living in the FN-controlled city of Daloa. Farmers are only gradually returning to the Montagnes and Moyen Cavally regions, up to 50 percent of whose populations fled following the crisis. Thus cocoa farms in these areas were not properly tended, and much of the crop was left to rot in the fields. The overall loss in cocoa production is estimated at 30 percent compared to 2001/02. The forecast production of 1 315 000 tonnes for 2002/03 lowered to 920 000 tonnes.
- **Coffee.** Coffee plantations covered 602 075 ha in 2001. The main producing areas are Haut Sassandra, Montagnes, Moyen Cavally, Bas Sassandra, Sud Comœ, Agnèby, Sud Badama, Lagunes, Moyen Comœ, Fromagers, Lacs, Marahoue and N'zi Comœ. Much of the crop was lost after massive population displacements from conflict zones, the departure of foreigners from government-controlled areas and the pervading insecurity that hindered access to farms and prevented traders from collecting the stored production after harvest. Losses in the coffee crop are anticipated at 35 percent of the 2001/02 production level, which amounted to 156 520 tonnes, according to the Ministry of Agriculture. Average annual production for the previous five years was 270 000 tonnes. The declining production, along with the reduction in area planted (25 percent) is also the result of low international prices.
- **Cotton.** During the 2001/02 campaign, the area cultivated to cotton came to 280 115 ha, compared with the average of the four previous years of 270 000 ha. Main producing areas are Savanes (65 percent of area planted), Worodougo, Denguele, Vallée du Bandama, Marahoue and Haut Sassandra. Production losses are estimated at 10 percent as the result of poor storage. Cotton companies did not collect the crop in time, and have not yet paid for what they have collected.
- **Palm oil.** According to the Ministry of Agriculture, 194 790 ha were planted to palm trees in 2001/02, yielding 1 144 741 tonnes of bunches. Production takes place in four main regions: Lagunes (36 percent), Bas Sassandra, Sud Comœ and Sud Badama. The Bas Sassandra region has been most affected by the massive departure of migrant workers, Liberians and Burkinabes.

Smallholders account for forty percent of the production, which is expected to drop by 10 percent compared to 2001/02, partly as a result of aging trees.

- *Rubber*. In 2001/02, latex production amounted to 116 752 tonnes from 116 050 ha of plantations. Production is concentrated in the Lagunes Regions (over half of the country's rubber), Bas Sassandra, Sud Comœe, Fromagers and Moyen Cavally. While the rubber plantations appear to be well cared for, the Mission was not provided with enough information to be able to appraise crop performance.
- *Cashew nuts*. Cultivation of this newly adopted crop is on the rise, with 133 273 ha planted in 2001 in the following areas: Zanzan region, Vallée du Bandama, Savanes, Denguele and Worodougou. Production data are not available, but population displacements and the pervading insecurity in conflict areas have caused harvest losses of 30–50 percent depending on the location.
- *Coconuts*. According to the national agriculture census, 29 663 ha were planted to coconut trees in 2001. Producing areas are Sud Comœe (67 percent), Lagunes and Agnéby. Data were not available, and thus a fair assessment of production trends could not be made.
- *Sugar cane*. Although sugar cane was not included in the 2001 national census of agriculture, the Ministry of Agriculture estimates that production had decreased to 123 562 tonnes in 2000/01 from 151 388 tonnes in 1998/99 and 179 600 tonnes in 1999/00. No data are available for 2001/02. Average yearly production for the three preceding years was 151 487 tonnes of sugar. Owing to the shortage of labour and prevailing insecurity, production is estimated to decline by 10–20 percent.

Table 2. Côte d'Ivoire: Exports of major crops, 1998–2003 in tonnes

	1998	1999	2000	2001	2002 (E)	2003 (F)
Cocoa beans	895 729	1 113 177	1 114 330	1 025 954	1 006 285	863 938
Cocoa products	159 127	174 575	184 332	221 085	247 673	260 057
Coffee beans	237 804	117 635	342 763	226 529	147 840	105 628
Coffee powder	9 277	10 473	9 248	9 161	10 601	9 541
Cotton (fibre)	122 337	131 208	160 652	112 626	137 528	103 146
Palm oil	101 660	101 009	72 191	74 535	65 022	68 663
Bananas	206 462	241 618	243 049	255 582	256 000	237 824
Pineapples	149 356	201 787	187 836	195 236	173 829	172 265

E = Estimates

F = Forecast

Source: Banque centrale des États de l'Afrique de l'Ouest (BCEAO), Abidjan.

3.3 Crop prospects for 2003/04

Lack of labour in the rebel-controlled zones and in those that have recently come back under government control (such as Moyen Cavally and the western part of Montagnes) will hinder the cultivation of large areas. In addition, in the FN-controlled zones, scarcity or lack of seed and other agricultural inputs coupled with the lack of technical assistance will be a major constraint to production. However, thanks to the assistance that the government is providing in the zones under its control, the anticipated heavy decline for some crops in the north and the west might not be significant at national level.

3.3.1 Food crops

Table 3 presents food production prospects for 2003/04, with the regions most at risk and estimated reduction compared with production levels from 2002/03.

Table 3. Côte d'Ivoire: Food prospects by commodity for 2003/04, percent change from 2002/03, with estimates for most significant areas

	Rice	Maize	Millet	Sorghum	Yams	Cassava	Groundnuts	Plantains
National level	-13.2	-11.0	-20.8	-20.2	-7.0	-4.9	-20.3	-5.3
Bafing	-17.5						-17.5	
Bas Sassandra						-11.3		
Denguele	-20	-20					-20	
Haut Sassandra	-22.5	-22.5			-22.5			-22.5
Montagnes	-22.5					-22.5		
N'zi Comœ	-12.5							-12.5
Savannes	-22.5		-22.5	-22.5			-22.5	
Sud Bandama								-12.5
Vallée du Bandama		-22.5			-21.3	-21.5		-21.3
Worodougou	-22.5	-22.5			-22.5		-22.5	
Zanzan		-16.3						

3.3.2 Export crops

Cocoa production in 2003/04 declined by about 10 percent to 800 000 tonnes compared to the 2002/03 campaign despite the relatively high prices on world markets. Because of low prices, coffee production is not expected to exceed the 2001/02 production of 150 000 tonnes.

Areas planted to cotton will decrease by about 20 percent, according to cotton companies. Distrust of cotton traders because of late payments to farmers, along with the reduction of the services that the cotton companies had been providing to farmers (including credit in kind, such as seeds for food crops and other inputs) have adversely affected cotton production. Thus, according to *La Compagnie cotonnière de Côte d'Ivoire*, the ratio of areas planted to cotton vs. food crops will decrease from 48 to 40 percent. This could translate into a 27 percent drop in cotton production. Moreover, cotton companies are experiencing financial difficulties and will no longer be able to provide an estimated 200 million CFAfr worth of inputs to cotton producers.

Palm production has been affected mainly by labour scarcity. The Liberians, who have since left, made up about 80 percent of the workforce for this crop. They are being replaced to some extent by the local population, but in Bas Sassandra, PALM-CI had achieved only 60 percent of its production targets for the year at the time of the Mission. A 15 percent drop in production is expected compared to the 2002/03 season.

Owing to labour displacements in Bas Sassandra and consequent delays in tapping rubber, latex output is anticipated to decline by some 20 percent. Cashew plantations have been left unattended in conflict-affected areas in the north and northeast. Production is expected to drop by about 30 percent for the 2003/04 campaign. In addition to labour shortages, stem borers are affecting sugar cane production, which is forecast to decline by more than 20 percent.

3.4 Livestock and fish production

The livestock and fisheries sectors contribute to the nation's food security not only in terms of animal proteins, but also as employment and income-generating activities. In 2001, Côte d'Ivoire's animal population comprised 1 440 000 cattle, 2 649 000 sheep and goats, 346 000 pigs and 30 million poultry birds. Meat production amounted to 56 800 tonnes, covering about 57 percent of needs established at 6 kg/caput/year. Fish production was 70 000 tonnes or 35 percent of the 200 000 tonnes needed for a per capita consumption of 12 kg per year.

Côte d'Ivoire is thus in a deficit situation concerning animal protein, which must be compensated by imports; the deficit is bound to widen with population and urban growth. The crisis that started with the military uprising in September 2002 has exacerbated the deficit, because it has disrupted production and trading of livestock and fisheries products across the country. This was observed in areas visited by the Mission.

In the so-called transition or host zone (Daloa, Sakassou, Tabou), fish production has almost come to a stop, as fishermen from Burkina Faso and Mali have left following the crisis. Four fish were selling for 2000

CFAfr at the time of the Mission, as opposed to ten for the same amount before the crisis. In the vicinity of Daloa, excessive meat demand by the military has hampered cattle rearing.

It should be noted that the Daloa wholesale grain market, which used to collect maize from the Vavoua area and supply it to animal feed factories in other parts of Côte d'Ivoire and also in Mali and Burkina Faso, has ceased to function owing to insecurity and harassment at road blocks. This has been particularly detrimental to poultry production around Abidjan.

In areas under FN control, the impact of the crisis differed according to location and the types of animals involved. In the cattle region of Korhogo in the north, significant losses of cattle have not been noted, but the price has dropped by half to 100 000 CFAfr per live animal. Standard vaccination campaigns against major diseases such as pleuro-pneumonia have not been conducted in the past two years, while cross-border movements of animals have gone uncontrolled, which has exposed local herds to increased health hazards. Likewise, meat hygiene has become lax from a lack of veterinary services, as nearly all government-employed veterinarians have left these areas.

Around the city of Man in the west, animal husbandry and fish farming facilities supported by the BAD-ELEVAGE and BAD-OUEST projects have been destroyed. Seventy-seven farmers have lost up to 8 000 pigs and their fish ponds have been emptied. Producers in the department of Danané suffered a similar fate.

In the areas under government control but formerly overrun by the FN, such as the Bin-Houyé and Zouen-Hounien sub-prefectorates, virtually all farm animals (cattle, small ruminants, poultry, pigs) have been killed and fish farming has been devastated. In the Tabou area, fishing has declined as foreign fishermen have left. Indigenous fishermen are still active, but they lack the basic training and equipment (boats with outboard engines, improved nets and fishing lines).

Animal production research centres and experimental flocks of improved breeds of cattle and sheep as well as ponds for fingerling production have been looted in many locations; such is the case for *Bovins industriels de Noroningué*, *Centre national ovin de Béoumi*, *Programme national de sélection ovine de Bouake*, *Ferme semencière de Badikaha*, *Ranch de Sipilou* and the *Centre d'alevinage de Dopleu* around the city of Man.

According to the Ministry of animal production and fisheries, output in this sector will decline by 10–20 percent in 2003 and remain stagnant in 2004. Urgent measures recommended are animal vaccination campaigns, particularly in the northern zone; provision of veterinary products and re-establishment of veterinary services where needed, including the animal disease surveillance network; resumption of maize trading for feed production by restoring security in producing areas; and dismantling unnecessary roadblocks.

4. THE FOOD SUPPLY SITUATION

4.1 Marketing of agricultural products and food prices

Before the crisis, Côte d'Ivoire enjoyed a fairly efficient food marketing system with a transport network that allowed for an easy flow of produce from producing areas to consumption centres at a reasonable cost and in a reasonable amount of time. Keen competition among traders ensured fair prices to both producers and consumers; while they were on the road they could keep in touch with both their base and their suppliers. The September 2002 military uprising that has brought about insecurity, population displacements and the *de facto* partition of the country, along with excessive policing of the transport system, have severely constrained the marketing of agricultural produce. The resulting market segmentation has affected all actors in the commodity chains at varying degrees depending on their location. For instance, the Mission observed that some producing areas far from the main markets of Abidjan can hardly find buyers for their harvests, which they dole out for very little money to the very few traders who turn up sporadically. This was the case in the FN-occupied areas around Bouake, Korhogo and Touba, as well as in the villages around the government-controlled town of Daloa. Typically, farm gate prices quoted at the time of the Mission for items such as plantain were around 500 CFAfr for 3 bunches vs. 2 000 CFAfr before the crisis at a similar period; paddy, 250 CFAfr/5kg vs. 550 CFAfr; maize, 150 CFAfr/5 kg vs. 500 CFAfr; and beef (Korhogo area), 500 CFAfr/kg vs. 1 000 CFAfr. It did not appear that yams were being sold at give-away prices even at the farm level, because yams are a prized commodity for villagers and can be stored for several months after harvest.

Farmers said that on average and in normal times, they sold about one-third of the food they produced, keeping the balance for household consumption. But many stated that since the crisis began, they could barely sell 10 percent of their food production. However, cereal producers around Korogho in the north and Touba in the northwest, both areas under FN control, feared that they would run short of maize and rice by January 2004, as they had to sell them at very low prices to meet emergencies such as healthcare or compulsory social obligations. The cereals thus sold as well as other agricultural products were often ferried to neighbouring countries. Sales at give-away prices meant that farmers will not have enough savings to buy food when the lean season arrives. Hence the idea of establishing cereal banks, as a women's cooperative based at Tioro was trying to do with the assistance of a Canadian-supported NGO. With revolving funds, a cereal bank could purchase cereals at harvest from farmers at high enough prices to allow them to meet their immediate financial obligations. During the lean period, farmers could buy back the cereals at affordable prices.

At the wholesale level in Daloa and Bouake, traders have had to adjust to the depressed demand by buying very little from their suppliers and keeping few stocks. A Bouake yam dealer who used to buy and sell 10 truckloads of yams a week before the crisis could handle only five or six (10 tonnes each) in a week, selling for 75 CFAfr/kg with a 5 CFAfr profit vs. 75 CFAfr with a 15 CFAfr profit about a year earlier. A rice merchant in the same market had been holding about 4 tonnes of paddy for 3 weeks, with no buyer even at the give-away price of 60 CFAfr/kg, and this would cause him to incur a heavy loss, he said. A maize trader in Daloa preferred to wait in his warehouse for nearby farmers to bring him the maize they wanted to sell, citing insecurity and prohibitive travel costs if he were to go to producing areas such as Vavoua to collect goods. As a result, he had only 2.8 tonnes of maize for sale, compared to ten times as much in a similar period before the crisis. The hefty levies at numerous roadblocks, which in this case amounted to about 100 000 CFAfr for a 3.5 tonne truckload of maize over a 15 km distance, have stifled trade in agricultural products in the area, he maintained.

In the Bouna-Bondoukou area that is still supplying yams to Abidjan, traders have been experiencing similar difficulties. Some rural markets around Bouna have been closed for security reasons; the cost of collecting produce from the farm gate has doubled to 10 CFAfr/kg, and that of transport has more than tripled to 35 CFAfr/kg. When ferrying 20 tonnes of yams from Bouna to Abidjan, wholesalers must first pay a *laissez-passer* amounting to 40 000 CFAfr, and then 200 000 CFAfr more for levies at some 40 roadblocks that have been set up along the 420 km distance. Before the conflict, road fees added up to only about 20 000 CFAfr. Traders said that the prevailing situation had caused them to reduce their yam shipments to Abidjan by some 50 percent; this situation is reflected at the farm level. Last year in Koutouba village for instance, two-thirds of the yams offered for sale found no buyers.

The war-related transport problems and insecurity have also caused the price of cashew nuts, a major cash crop in the Bondoukou area, to drop to 180–250 CFAfr/kg, compared with 400–500 CFAfr/kg about a year earlier. Some of the cashew crop has been sold in neighbouring Ghana where prices are more attractive (the equivalent of 35–50 CFAfr more per kg). Transport was also easier, with only three roadblocks between Bondoukou and the nearest town in Ghana.

In contrast to provincial markets and farming areas where prices of foodstuffs are depressed compared to the pre-conflict period, prices in Abidjan have increased substantially, reflecting reduced supplies of most food items. Representatives of COCOVICO, a largely women's cooperative based in Angre market and involved in the marketing of farm produce, told the Mission that before the crisis, they used to be supplied from almost all the major producing areas of the country, and also from Burkina Faso and Niger for fresh tomatoes and onions. But now that supply routes have become very expensive and risky, they receive smaller quantities of food items than previously, and have to sell them at higher prices to break even. Thus milled local rice from Vavoua was selling for 300–350 CFAfr/kg at the time of the Mission vs. 200 CFAfr a year earlier; yams from Bondoukou were 200–250 CFAfr/kg vs. 100–125 CFAfr, and plantain went for 1 000 CFAfr a bunch vs. 700–800 CFAfr before the crisis.

Grain traders in the Abidjan Adjame market recounted similar stories. Their transport costs from Vavoua to Abidjan have increased from 1 000 CFAfr to 5 000 CFAfr per 100 kg of maize. If the same quantity of maize could now be bought in Vavoua for 3 500–4 000 CFAfr vs. about 8 000 CFAfr before the crisis, it was being sold in Abidjan for 12 000 CFAfr vs. some 9 000 CFAfr one year earlier. One merchant pointed out that he used to handle about six maize shipments of 40 tonnes each on a monthly basis before the crisis, as against one shipment only at the time of the Mission.

Prices have also increased in the Abidjan Port Bouët livestock market, mostly supplied from Burkina Faso. Rather than going through Bouake as before the crisis, truckloads of sheep have been transiting through Ghana at a cost of 1 500 000 CFAfr each compared with 800 000 CFAfr about a year earlier. Consequently the price of a ram has gone from 17 000 CFAfr to 27 000 CFAfr, with the numbers traded reduced by about 60 percent from the pre-crisis level. The resumption of rail transport between Abidjan and Burkina Faso in September 2003 has somewhat reduced shipment costs, which at the time of the Mission were still 1 200 000 CFAfr for a carload of 200 sheep vs. 650 000 CFAfr before the crisis, bringing down beef prices from about 1 700 CFAfr/kg to 1 200 CFAfr.

4.2 The food supply/demand balance in 2003/04

The 2003/04 projected food supply/demand balance summarized in Table 4 is based on the following parameters and assumptions:

- In 2004, the population figure should stand at 17.8 million based on a UNFPA estimate of 16.69 million in 2001 and an annual growth rate of 2.14%. But an estimated 500 000 migrant workers and other foreigners left the country following the crisis in 2002 and most of them have not yet returned. Therefore, the population is assumed to be 17.3 million.
- Food production for 2003, with rice on milled basis, is estimated at 1.11 million tonnes for cereals and about 1.5 million tonnes for major non-cereal crops (roots and tubers, plantain) in cereal equivalent (the cereal equivalent conversion factors are given in Table 4 footnote). But as discussed in the preceding sections, crisis-induced problems are severely constraining the marketing of agricultural products. Thus the marketable surplus in many producing areas is not necessarily available to consumers in deficit areas.
- The opening stocks held by the private sector are estimated at 335 000 tonnes of cereals. These stocks include some 300 000 tonnes of rice, 15 000 tonnes of wheat and 20 000 tonnes of millet. It is assumed that farmers and traders held negligible stocks of maize and other crops because of the military uprising and the ensuing political crisis.
- Based on FAO's average apparent consumption statistics the annual per caput consumption of main cereals is estimated at 129 kg consisting of 18 kg of wheat, 75 kg of rice, 30 kg of maize, 1.9 kg of sorghum, 4.2 kg of millet. There is, however, no reliable information on consumption rates for roots and tubers and plantain for Côte d'Ivoire. Therefore using the FAOSTAT Balance Sheet per capita supply as a guide and allowing for possible substitution among various roots, tubers and plantain commodities, the national average consumption rate of 315 kg of crude weight (cassava 90, yams 150 kg and plantains 75 kg.)² or 84 kg in cereal equivalent is used. This level of consumption of cassava, yam and plantain together are expected to provide about 30 percent of the daily caloric requirement of 2595 kcal in addition to about 45 percent obtained from the main cereals.
- Seed use is based on the recommended seeding rates and the estimated planted areas. Other uses include feed use and waste.
- There are reports of unrecorded exports of maize, rice, sorghum and other food commodities to neighbouring countries since the crisis began. But export levels are judged to be much lower than before the crisis.
- Closing stocks for the 2003/04 marketing year are estimated at 15 000 tonnes of wheat and 300 000 tonnes of mostly imported rice. As explained earlier, lack of harvests in many areas and the fact that farmers are compelled to sell their crops at very low prices to meet emergencies suggest negligible closing stocks.

² The FAOSTAT Food Balance Sheet data for 1997-2001 average per capita annual consumption shows 97 kg of cassava, 124 kg of yam, and 72 kg of plantain.

Table 4. Côte d'Ivoire: Food balance sheet in cereal equivalent, 2004 in '000 tonnes

	Wheat	Rice	Maize	Sorghum	Millet	Total Cereals	Total other crops in cereal equivalent	Other major crops in c. e. ^{1/}		
								Cassava	Yam	Plantain
Domestic availability	15.0	808.5	523.0	23.6	74.7	1 444.8	1 490.4	504.3	695.2	290.8
Opening stocks	15.0	300.0	0.0	0.0	20.0	335.0				
2003 Production incl. milled rice	0.0	508.5	523.0	23.6	54.7	1 109.8	1490.4	504.3	695.2	290.8
Total utilization	331.1	1 725.0	658.0	39.1	84.0	2 837.2	1 500.5	512.6	694.2	293.7
Food use	311.1	1 297.5	518.5	32.9	72.7	2 232.7	1 500.5	512.6	694.2	293.7
Seed and other uses	5.0	127.5	134.5	6.2	11.3	284.5				
Exports	0.0	0.0	5.0	0.0	0.0	5.0				
Closing stocks	15.0	300.0	0.0	0.0	0.0	315.0				
2004 Import requirements	316.1	916.5	135.0	15.5	9.3	1 392.4	10.1	8.3	-1.0	3.0
Estimated commercial imports	300.0	900.0	2.0	5.0	0.0	1 207.0				
Uncovered deficit	16.1	15.4	133.0	10.1	9.9	184.4				

^{1/} Using cereal equivalent factors of: 32% for cassava, 26% for yam and 22% for plantain (based on calorie content tables from FAO).

Total cereal import requirements are estimated at nearly 1.4 millions tonnes, including 916 500 tonnes of rice, about 316 000 tonnes of wheat and 160 000 tonnes of coarse grains. Wheat and rice imports are expected to remain within the levels of recent years. Of the total cereals import requirements, about 1 207 000 tonnes are expected to be supplied commercially, whereas some 184 400 tonnes should be provided through external assistance. Currently known food aid commitments amount to about 50 000 tonnes of cereals (26 622 tonnes from WFP as emergency food aid, and the balance from Japan and other donors. The remaining gap -134 400 tonnes- must, therefore, be filled by the Government and the international community in the form of food imports.

4.3 Household food security

In general terms, the food security situation has recently shown signs of improvement in most of the conflict-affected areas, while it has remained stable elsewhere in the country.

The nutritional situation nationwide has also improved. In the areas where humanitarian actors have access and where supplementary and therapeutic programmes are in place, they are reporting that malnutrition is limited and more or less in line with the rates of structural malnutrition that existed prior to the crisis. More recently, a UNICEF/WHO nutrition survey indicated that acute malnutrition has significantly declined³ in the western region (Man, Danané and Toulepleu), although only few months ago the situation of this area was reported to be especially worrisome.

The onset of the harvest and relative stability have eased the situation somewhat. In addition, a number of internally displaced persons (IDPs) have been returning to their areas of origin, while the remainder – who have been sheltered for several months in host areas – have been developing coping strategies. However, despite these relatively positive developments, improved food security for many households continues to be hampered by disruption of livelihoods. Smallholder cash crop producers in particular are experiencing a significant loss of income.

The population in all areas visited complained about lack of access to markets for cash crops. Lack of free mobility between and within government and FN areas is also handicapping the farmers. Unscrupulous businessmen who can afford to pay both sides are exploiting the farmers, who cannot afford to travel easily. The price of coffee and cocoa has dropped to such an extent that some farmers are threatening to stop production altogether if the government authorities do not intervene quickly on their behalf. Tensions among the indigenous Ivorians and the migrants (*autochthones, allogènes, étrangers*) are still high in certain places, and this situation is preventing access to farms so that the population can resume agricultural work.

As a result, specific groups remain at high risk of food insecurity. In particular, people returning to their places of origin along the Liberian border where severe fighting occurred early this year are still facing

³ 6.5% acute global malnutrition (8.5% DHS 1998).

serious obstacles in restoring agriculturally based livelihoods. The population that lost their 2002 harvest during the fighting report that the 2003 crop does not look promising since planting was carried out too late in many areas. Indeed, many returnees in Bin-Houe, Zouan-Hounien and Toulepleu arrived too late to plant their main staple crop (rain-fed rice) and have not been able to harvest in October. Although some of them have benefited from swamp rice seeds distribution (Emergency Agriculture Programme FAO/WFP) and are expecting a harvest by December-January, the food security situation might be difficult during the beginning of the next planting season (from May/June 2004 onwards). The collapse of the cash crop economy also has negative impact on the predominantly cash crop farmers. Cocoa prices were extremely low in Bin-Houye compared to before the crisis and also the prices recorded in other areas (as low as 125 CFAfr, which is the third of the recommended price). This is due to access problems such as insecurity and harassment at road blocks and also to the limited number of traders operating in the area.

Coffee prices have collapsed for more than two consecutive years. The income generated by cash crops' sale is usually used to overcome the lean season and buy food when the households' own stocks are exhausted.

Along the ethnic border between Yacouba/Guéré groups, sporadic disputes are still occurring and insecurity remains a concern preventing people to access their farms.

There consequently continue to be pockets of vulnerability (Bangolo, Zou, in Guiglo prefecture and Bin Houyé and Zouan Hounien in Danané prefecture). The collapse of the cash-crop economy is also having a negative effect on those farmers.

Similarly, the situation in the eastern region of Bouna remains precarious. This prefecture in one of the poorest parts of the country has been severely hit by the crisis, because farmers have been unable to face the decline in yam production and sales; they are losing their main source of income as a result.

Consumption patterns have been modified as a result of the crisis. Both the quantity and quality of food have declined. Family members are reported to be consuming one to two meals per day. The composition of food does not include meat or fish (the usual source of protein) in most cases, and meals are generally composed of low-quality or less-preferred foods.

In the northern Korhogo area, markets continue to be well stocked following a relatively favourable harvest this year. However, despite the current abundance of food in the market, there is reason to be concerned about the coming lean season as stocks are likely to be rapidly depleted. Indeed, lack of cash in this northern town is forcing farmers to sell their harvest for almost nothing. For example, 5 kg of maize is being sold for 150 CFAfr, compared to 500 CFAfr before the crisis; 5 kg of rice is going for 250 CFAfr, compared to 600 CFAfr before. The lack of cash is due mainly to non-payment of cotton production for two consecutive years. The conflict and the resulting border closures have led to further constraints in this sector. Cotton farmers have still not been paid for their 2001/02 harvest, and many of them are consequently increasing their food production to the detriment of cotton farming.

It was reported from some areas that rural depopulation is increasing: youths are leaving their villages in search of work as a coping strategy.

5. EMERGENCY ASSISTANCE

5.1 Current intervention

WFP has approved three emergency operations in Côte d'Ivoire since the onset of the crisis. EMOP 10243, covering the first months of the crisis, provided food relief assistance to displaced people fleeing war zones. EMOP 10244 covered the period from November 2002 to April 2003. The present operation, EMOP 10244.1, which initially covered eight months from May–December 2003, was extended to December 2004.

Under EMOP 10244.1, WFP is targeting individuals affected by displacement as well as other vulnerable populations in the north and west. Camp populations of IDPs and refugees receive full general rations. Other IDPs, recent internal returnees and other crisis-affected populations (e.g. cash crop farmers) are receiving general rations or, increasingly, FFW rations that support agricultural production and seed protection (in conjunction with FAO-assisted seed distribution programmes). Vulnerable groups – such as severely and moderately wasted children and hospital patients – are assisted by WFP through medical NGOs. WFP also provides FFW assistance to workers who provide basic social services in the north and

west. Finally, a major thrust of the current EMOP has been the expansion of emergency school feeding, particularly in the north.

5.2 Beneficiary needs and targeting

WFP assistance in 2004 will take a marked shift towards support to rebuilding livelihoods (in the west) or to assisting the transition to alternative livelihoods (in the north), as opposed to providing relief assistance through general rations. IDPs and refugees in camp or temporary shelter situations will continue to be assisted with general rations. In conjunction with UNHCR, a total of 16 000 refugees have been identified for assistance through a general ration – an increase from the 13 000 originally foreseen in the current EMOP (largely to the increased numbers of Liberians housed in and around the Tabou transit centre).

5.3 Beneficiaries, Food Basket and commodity requirements

A full breakdown of beneficiary caseload and food requirements and food needs by type of intervention can be found in Table 5.

Table 5. Beneficiary caseload and food requirements by type of intervention

Intervention type	Beneficiary caseload	Food Requirements Cereals MT	Total (cereal and non-cereal) Food Requirements MT
General distribution	94 000	7 177	9 429
Refugees	16 000	2 423	3 146
IDPs	8 000	1 226	1 621
Returnees	70 000	3 528	4 662
Safety nets	580 000	19 244	24 407
Emergency school feeding	345 000	6 728	8 746
FFW ¹	225 000	10 800	13 635
Institutional feeding	10 000	1 533	2 026
Complementary ration (transit)			
Selective feeding	14 000	383	1 117
Therapeutic	500	0	27
Supplementary	11 000	0	584
Take-home ration after therapeutic feeding ¹	2 500	383	506
Total	688 000	26 622	34 953

¹ Family ration for family size of five. Normally, children discharged from a therapeutic feeding centre would be transferred to supplementary feeding programmes (SFP); in the absence of SFP in some parts of Côte d'Ivoire, children are released by MSF with a take-home family ration.

5.4 Planned interventions and main beneficiary profiles for 2004

5.4.1 Emergency response through a full or reduced general ration

- *Refugees and IDPs in camps, returnees.* Those who have been displaced as a result of armed conflict and intimidation, the majority of whom are women and children, will receive a full general ration of 2 100 kcal/day. Those who have some alternative resources will receive a reduced general ration of 1 830 kcal/day. Returning IDPs and refugees will generally receive this assistance for 4 months. Although for planning purposes, in agreement with UNHCR, WFP has maintained a total of 26 000 refugees in camps for food assistance during 2004, at the beginning of 2004, the two Agencies had to face a new unexpected influx of Liberian refugees in Bin-Houyé and Danané. This area was the scene of intense fighting and pillaging during the crisis, and families were hiding in the forest for many months. Food assistance is targeting about 7 000 refugees hosted in the villages, and first distributions are intended to cover their needs until end February 2004. Though UNHCR is not planning assisted repatriation programmes in 2004, as stability returns to Liberia, there may be significant spontaneous returns. Should conditions be suitable for their safe return, WFP and UNHCR will encourage this. Many other Liberian refugees have been settled for years outside of Liberia (in Côte d'Ivoire and Ghana particularly) and are not expected to return, no matter the degree of stability. Plans for phasing out food assistance for this category of refugees –

many of whom were integrated in local communities and received no assistance before the crisis in Côte d'Ivoire – will be developed during 2004.

5.4.2 Emergency response through selective feeding: therapeutic feeding, supplementary feeding, and mother and child health

- *Severely and moderately malnourished children.* When cases of malnutrition are diagnosed by nutritional /medical implementing partners, WFP will provide therapeutic and supplementary rations to the children and their families (or to the accompanying adult in the case of therapeutic feeding). WFP will support government- and NGO-managed MCH programmes in vulnerable areas as soon as such programmes are established.

5.4.3 Emergency recovery response through safety net programmes such as FFW, institutional feeding for vulnerable groups, and emergency school feeding

- *Small cash-crop farmers, returnees, IDPs in host communities through FFW/Agriculture.* Small cotton producers in the north are heavily cash-dependent for their household food security. Those who work through certain cotton cooperatives are particularly vulnerable and highly indebted. As a coping strategy, they are shifting production to food crops (maize and rice). Shortages of seeds, tools and fertilizer are constraints to achieving harvests that will consistently, over time, ease their household food shortages. Working together with FAO and local NGOs – and through village committees – WFP will target communities based on vulnerability (dependence on cash crops, drought, hosting large numbers of IDPs, etc.). Beneficiaries will be selected based on size of cotton growing parcel as well as on family size and composition (with female-headed households given first priority). The role of food aid is to maintain nutritional status during the lean months and provide an income transfer – protecting seed stocks and freeing up income for agricultural investment – in order to help achieve sustainable household food production. WFP will also target communities where returnees are rebuilding their farming livelihoods (in the west) and in rural communities where vulnerable IDPs are beginning to settle more permanently (in villages surrounding cities of the north and along the north/south demilitarized zone). When appropriate, host families will also be eligible for assistance. In the west, WFP will also undertake FFW to rehabilitate community infrastructure (schools, water and sanitation points, health facilities). Women in village committees have the key role in identifying community infrastructure activities.
- *Workers providing basic social services.* In the north and west, former government-supported schools and social institutions such as health centres, hospitals, sanitation departments and so on are no longer funded and/or have lost their staff. Through FFW to staff and volunteers, WFP will provide an incentive to these workers in order to help maintain basic services for the population. During 2004, if possible, WFP will phase out of this assistance as government structures are re-established nationwide.
- *Primary school children.* In the north and west, WFP emergency school feeding (ESF) will serve as an incentive to re-open schools and thereby re-establish a sense of normalcy and provide a minimum of structured activities for the psychosocial development of the children. In the centre/south, ESF will help support school systems in areas with heavy IDP populations. Nationally, the ESF intervention will benefit from the management structures already in place from Côte d'Ivoire's now suspended development school feeding programme. ESF will also serve to maintain school feeding continuity until the re-establishment of the development project becomes feasible. In Mali and Burkina Faso, the platform of WFP's development school feeding programme will be expanded in an emergency scheme to cover areas (in the south in both countries) with large returnee populations that presently are not benefiting.
- *Vulnerable groups in social institutions.* Permanently hospitalized, handicapped people, and orphans in institutions of the north have become almost completely dependent on outside assistance for their food needs. In addition, WFP will support feeding in social institutions that are providing counselling and vocational training for ex-child soldiers and women and girls abused or exploited during the conflict. WFP will also support institutions offering HIV/AIDS awareness training.

5.5 Programme approaches

5.5.1 Timing of assistance

To maximize its impact, WFP food assistance needs to arrive at the right time. Seeds need to arrive before end March to begin the agricultural season on time, and food commodities should be received before May for the lean season (June–September depending on the area), when market prices are high and vulnerable people are hungry.

5.6 Non-food inputs

WFP will continue to budget for essential non-food items to complement WFP's food input. Agricultural tools and seeds will complement the inputs of FAO under FFW/Agriculture.

This report has been prepared by Messrs. B. Badjeck, M. Abdalla, and N. Labidi under 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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