S P E C I A L R E P O R T

FAO/WFP CROP AND FOOD SUPPLY ASSESSMENT MISSION TO ANGOLA

6 August 2004

Mission Highlights

- After almost three decades of armed conflict, followed by two years of peace and stability, security in Angola has noticeably improved and circulation within the country has become easier. People must still cope daily with landmines, and removing them is one of Angola's top priorities. Furthermore, the extremely poor condition of the roads is seriously hindering market activities, increased access to food or the expansion of income-generating activities, particularly in the countryside.
- The capital-intensive oil sector dominates the Angolan economy, generating over 60 percent of the country's GDP and accounting for nearly all exports. Angola is sub-Saharan Africa's second biggest oil exporter. In contrast, the agricultural sector employs some two-thirds of the working population but contributes only 6 percent to Angola's GDP (18 percent in 1990); it receives less than 1 percent of public expenditures. Less than 5 percent of all arable land is cultivated. The increase in oil production could foreseeably help boost real GDP growth to 11.3 percent in 2004 or 13.7 percent in 2005; this increase, however, would probably have only a limited or even a negative effect on the non-oil sector. The predominance of oil in the economy induces such an appreciation of the local currency that it may eventually reduce the competitiveness of domestic production *vis-à-vis* imports.
- Cereal production in 2003/04 (including milled rice) is estimated at 713 000 tonnes, more than 9 percent higher than last year and 27 percent higher than the previous five-year average, mainly from increased areas under cultivation.
- Cereal import requirements for 2004/05 are estimated at 820 000 tonnes, of which 642 000 tonnes are expected as commercial imports and 178 000 tonnes as emergency food aid.
- Large numbers of internally displaced persons (IDPs), ex-UNITA soldiers and refugees from neighbouring countries are continuing to return to their original home areas. This continuous flow of people has made the quantification of vulnerable groups -- and of the overall population -- more complex.
- The average number of people in need of food assistance per month will be about 1.12 million, compared to 1.4 million last year. Many vulnerable and food insecure people are once again cultivating their fields and producing food even though many lost their assets as a consequence of the war. This year is a turning point, in particular in provinces where cassava is the major crop, since it is now coming into full production. Although the numbers are likely drop later on, many resettled families will continue to need food assistance until the main 2005 crops are harvested.

1. OVERVIEW

An FAO/WFP Crop and Food Supply Assessment Mission visited Angola from 16 May–5 June 2004. The Mission's objective was to assess 2004 crop production and cereal import requirements, including food aid, for the 2004/05 marketing year (April–March). The Mission also prepared recommendations concerning the rehabilitation of Angolan agriculture, a non-food needs assessment, and a vulnerability assessment. The Mission was briefed by the Ministry of Agriculture and Rural Development (MINADER), the Ministry of Social Assistance and Reintegration (MINARS) and by FAO and WFP country teams. Contacts were also made with the European Union (EU), UNDP, USAID and other organizations. Field visits were made to 7 of the country's 18 provinces, together with observers from the EU and USAID (in the centre and the south). Given the size and scope of this CFSAM report, it contains a table of contents and an Appendix with details of the crop situation by region.

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The Mission divided into two groups, with one visiting the provinces of Malange, Uige, and Kuanza Norte, and the other visiting Bié, Huambo, Huila and Moxico, covering the northern, central, and southern regions. Security was not a major problem during the visits, but the poor condition of roads combined with the large territory covered in such a short amount of time were two major constraints. Information on provinces not visited was provided to the Mission by the Food Security Unit of MINADER, by WFP/VAM and by the NGOs with projects in the country.

Since April 2002, when a cease-fire agreement was signed between UNITA and the Government of Angola, a large number of internally displaced persons (IDPs) and refugees in neighbouring countries have been returning to their homes, the rule being that they were not allowed to settle in other areas; the majority of these people are farmers. However, a large number of ex-farmers who have been living in the cities, especially the capital, are not likely to return to their farms since they have now become accustomed to urban life, and life in rural areas now offers little appeal given the almost complete lack of means of communication. An increasing number of returnees are farming their own land; however, many of them are still required to provide farm labour for wealthier farmers, mainly as a coping mechanism.

Agricultural performance in 2003/04 has improved overall in spite of too much rainfall in some areas during the first season and too little during the second season. The expansion of cultivated area is a major cause of the increase in production of cereals. The Mission estimated that the area planted to crops was about 2.91 million ha: an increase of 15 percent compared to last year's figure. However, the current cultivated acreage reflects only a very small amount – 4.8 percent – of the land that could potentially be used for agricultural purposes.

The Mission forecasts 2003/04 cereal production (including paddy) at 713 400 tonnes. This is 9.54 percent higher than last year and 27 percent higher than the five-year average. Cereals include maize (576 917 tonnes, up 5.83 percent), sorghum and millet (123 415 tonnes, up 26.71 percent) and rice (20 620 tonnes, up 32.12 percent). Production levels of cassava, the main staple food in the north, have been estimated at some 6.6 million tonnes (up 16.46 percent, fresh weight), a significant increase over last year.

The cereal import requirement for marketing year 2004/05 (April/March) is estimated at 820 000 tonnes, more than 11.5 percent over last year's level. Of that total, 642 000 tonnes will be commercially imported, leaving 178 000 tonnes to be covered by food aid.

According to Mission findings, the average number of people in need of food assistance per month during the period May 2004–April 2005 is approximately 1.12 million, a significant reduction compared with the previous year. This decrease reflects an improvement in living conditions as large numbers of IDPs and refugees return to their places of origin; some have harvested crops for two seasons now. The number of people requiring food assistance is expected to fall sharply following the 2005 harvest, as the second wave of returnees reaches self-sufficiency.

2. SOCIO-ECONOMIC CONTEXT

Angola covers 1.247 million km2; the 2004 estimated population is slightly over 15 million. The country is endowed with substantial natural resources, including extensive reserves of oil and gas, valuable minerals, particularly diamonds and important hydroelectric potential from its numerous rivers. The country has a huge and mostly untapped agricultural potential. The soils are fertile in the northern region and central highlands, where annual rainfall normally exceeds 1 000 mm. Livestock is found mostly in the south, which receives lower rainfall and is less populated than the rest of the country. The country also has vast marine and river resources and extensive forests. The civil war that began after independence in 1975 and continued up to April 2002 caused massive destruction of the country's infrastructure, disruption of markets, interruptions in the transfer of knowledge, social instability and economic disorder.

GDP growth is expected to rise to 11.3 percent in 2004 and 13.7 percent in 2005, mainly because of rising oil production, forecast at 995 000 barrels/day in 2004 and 1 250 000 barrels/day in 2004. Oil accounts for 85–90 percent of fiscal revenues and more than 60 percent of GDP. The value of exported oil is likely to increase further if oil prices remain at the current level. However, the war, together with inadequate economic policies, brought about high levels of inflation that still persist now (estimated at 77 percent in 2004), although the inflation rate decreased substantially this year. The overvalued exchange rate of the national currency, the Kwanza (Kz), with a real appreciation of 49 percent between 2000 and 2002, has had a negative effect on the recovery of domestic agricultural production, particularly as the country depends on food imports. The revenues from oil exports and oil-induced growth have only limited effects on the domestic economy since most of the population subsists in the informal sector.

Agriculture accounted for only 6 percent of Angola's GDP in 2000, compared with 18 percent in 1990, but is a fundamental activity in a country with a large rural population and a small industrial sector (oil excluded). It is indeed the main source of employment and food supplies and is, therefore, key to food security. Prior to independence (1975), food production was high and the country was a major exporter of maize and coffee.

During the years of conflict, agriculture fell to an almost subsistence level in many areas, with little or no marketable surpluses and very limited trade activity. Consequently, the country has for many years relied on food imports (commercial imports of wheat and rice) and food aid, mostly in the form of maize and beans. With the cease-fire, however, and the new mobility of people and products throughout the country, local markets have started to resume their activities despite the appalling condition of the road network and the widespread practice of extorting illicit tolls on the roads.

As more farmers return to their land, the food situation will improve gradually. Considering the country's agricultural potential, this process can be accelerated under favourable climate conditions and if the roads are repaired and improved.

The present report includes a series of detailed recommendations for revitalizing agricultural production and marketing in Angola. It is possible and probable that, in the near future, Angola will no longer need foreign food assistance, will be able to store food stocks for future crises or natural disasters, and will be able to resume the exportation of agricultural products. However, much work remains to be carried out. Most of the peasant population use only hoes and machetes as tools. Only in the south are draught animals utilized. Organization, tools, technical advice, credit and farm processing and general infrastructure are all lacking, both in factor and in product markets.

Angola's huge agricultural potential, for the moment, remains just that: a potential. The agriculture sector is caught in a vicious cycle and is stagnating; it has yet to reach the critical level beyond which it could play a dominant role in the region. There is much concern about the future of agriculture in Angola because, as a member of the Southern Africa Development Community (SADC), Angola should have removed all tariff and non-tariff trade barriers in the region within eight years. This process depends upon the rate at which member governments, including Angola, effectively dismantle the existing barriers to trade; the fact that the EU and South Africa have now concluded their own free-trade agreement endangers the process because SADC countries could now be flooded with cheaper European imports. South Africa alone is a major competitor whose GDP was more than twenty times larger than Angola's in 2002 (US$104.5 billion vs. US$ 4.5 billion).

The social and economic development of the country – an immense task still waiting to be accomplished – is closely linked with Angola's enormous agricultural potential. Hence, emphasis must be placed on the revitalization of subsistence and commercial farming, which would make it possible to achieve these development objectives.

Overall, the daily living conditions of the rural populations reflect their extreme poverty. It is estimated that only 57 percent of rural villages and towns function with a latrine system. Health clinics and personnel are scarce throughout the country. Access to medicine is often nonexistent because of high cost combined with very expensive and inconvenient transportation from the cities to the villages. About 80 percent of the population has no access to essential drugs. Malaria, measles, tuberculosis, and other diseases account for most of the infant and adult mortality. The HIV/AIDS pandemic is spreading through uninformed or passive populations: 54.4 percent of communities consider that nothing can be done to avoid being infected with the virus. Water – often unsafe for drinking – must be carried long distances. Only 10.8 percent of the population has access to a protected water source.

Angola was ranked 146th of 162 countries in the UNDP Human Development Index for 2001. Most people earn money in the informal sector. The average life expectancy was just above 40 years in 2001, and school enrolment reached only 29 percent of total school age population. While there are clear signs of a general improvement now that the civil war has ended, living conditions remain inadequate in most regions.

According to the Economist Intelligence Unit, the annual population growth rate in 2001 was 3 percent, with infant mortality at 154/1 000 live births and mortality for children under 5 at 295/1 000. The effects of malnutrition are evident throughout the country. The literacy rate is 42 percent, with 56 percent for males and 28 percent for females. Rural schools do not function properly because teachers, materials and food for the students are lacking. Although in many parts of the country houses are built of earthen bricks and look solid,

the housing situation is precarious and inadequate, especially in relation to the average size of rural families. Massive development efforts are needed to improve the population's condition.

3. AGRICULTURE IN 2003/04

3.1. General

There are three main agro-ecological zones corresponding to the main climatic and geographical features of the country: the north, with a humid climate; the semi-arid south; and the central highlands, Planalto Central, with a sub-humid climate, which is the transition zone between the humid north and the dry south.

The cropping pattern is varied. In the north (Uige, Kuanza Norte, Zaire, Malange) and the northeast (Lundas area), there is a predominance of cassava, maize, beans and groundnuts. Maize and beans predominate in the Planalto Central area. In the south maize and livestock predominate, moving towards areas in which maize is replaced by cassava, sorghum, millet and cowpeas, while pastoral systems dominate in the province of Cunene. According to MINADER's Serviço Nacional de Veterinaria, most of the livestock is reared in an extensive system in Cunene, where a large proportion of the country's livestock is to be found (500 000 head out of a total of 3 500 000).

In most rural areas, farming is the main source of livelihood, except in the south, where livestock predominates. The most vulnerable survive by collecting fuel wood, producing charcoal, and hunting and fishing in inland waters and streams; these are also the main sources of income or food during the lean period.

Temporary informal labour is another major livelihood for the most vulnerable. In the areas where food distribution takes place, this is an important source of redistribution. The most destitute work for those who have received food aid or for those who have food reserves. While casual labour for a neighbour – or for the wealthier in the community – is a major source of income for the poor, this practice nevertheless deprives the household plot of necessary labour.

Working on the commercial plantations such as coffee, which in the past provided livelihoods, is no longer possible because of the poor condition of most of the plantations and their limited employment opportunities.

MINADER's Food Security Unit (GSA) estimates the area planted to crops in the country on the basis of a model developed in 1999 with FAO support, Support to the Food Security Unit of MINADER. According to GSA estimates, the total area planted to crops during the 2003/04 cropping season reached 2 941 000 ha, which represents only 2.4 percent of the total area of the country and 4.8 percent of the area considered suitable for agriculture.

Agriculture in Angola is predominately a family-labour activity for millions of smallholder self-subsistence peasants who plant an average of 1.4 ha per family on two or more plots; the area planted increases slightly every year. Agricultural production is based on a rainfed main growing season from September to April (planting from September to February). This season accounts for about 95 percent of the total production of cereals and pulses, which are also the major food crops: cereals (maize, sorghum, millet and rice), beans, groundnuts, cassava, sweet potatoes and Irish potatoes. The second growing season is carried out mainly in low-lying wetland areas and is planted from June to August. This season accounts for about 5 percent of the production of cereals and pulses. Vegetable and sweet potato production is also very important in these areas. The most important vegetables are cabbage, tomatoes, lettuce, onions, peppers, carrots and pumpkin.

Most farmers practice traditional agriculture using hand tools for land preparation and weeding, planting local seeds held over from the previous harvest. In the central provinces of Huambo, Bié, the coastal area of Benguela, and in the southern province of Huila, many farmers use animal power. Some of them use tractors for land preparation and weeding; some use fertilizers and improved varieties of seeds like SAM 3 and Matuba. Intercropping is the usual agricultural practice, with maize, beans, groundnuts and cassava the most extensive pattern used. Vegetable crops are planted mainly as single crops in the low-lying areas (nacas).

3.2. Rainfall 2003/04

The rainfall patterns vary from north to south, influenced by the activity of the Inter-Tropical Convergence Zone (ITCZ). In the north, total annual rainfall is normally in the range of 2000 mm. The rains in the north start normally the first dekad of September and last until the end of April or early May. The rainy season in

this region is usually interrupted by a short dry period from mid-December to mid-January from the movement of the ITCZ to the south and then north again. The north produces significant quantities of cassava followed by maize, beans and groundnuts.

In the centre, total annual rainfall ranges from 1 200–1 400 mm. The rains normally begin in late September/early October, with a small two-week dry period usually in January after the ITCZ moves to the south. The centre produces mainly cereals (maize and sorghum) followed by beans and groundnuts and some cassava in the central eastern province of Moxico.

In the southern provinces of Namibe, Huila, Kunene and Kuando Kubango, annual rainfall normally ranges from 20 mm in the arid south coastal area to 800 mm in Huila and 500 mm in Kuando Kubango in the east. Rainfall in this region is activated by the brief transit of the ITCZ; the northern-most province of Huila receives the highest precipitation. The south produces cereals, mainly sorghum and millet; livestock raising is another major activity.

The 2003/04 cropping season was characterized by normal to above-normal rainfall in the north and the centre and normal to below-normal rainfall in the south. In general, the coastal area from the north to the south of the country received below-normal rainfall.

In the north, in the provinces of Uige, Kwanza Norte, Malange, Lunda Norte and Lunda Sul, the rains started on time in early September. During the following months, the rains were regular and normal to above-normal up to the end of the rainy season, promoting a good development of the crops in most municipalities. Expected yields are average in general for all crops in these five provinces, but the short dry spell in February affected the yields of beans and groundnuts, as well as maize in certain areas to a lesser extent. Heavy rains in Kwanza Norte caused some localized floods and loss of fields along the rivers and low-lying areas. In the four provinces located along the coastal area of the country (Cabinda, Zaire, Bengo and Luanda), the rains started late the third dekad of October and were irregular and below-normal along the coast, affecting yields in these areas. Yields in the remaining areas of these four provinces were average.

In the centre, the rains started on time in the third dekad of September. Rainfall varied from below-normal in the coastal border of the provinces of Kwanza Sul and Benguela to normal in the eastern province of Moxico and above-normal in the high central plain provinces of Huambo and Bié. The rains in these last two provinces were heavy and continuous during January and February, affecting yields in the province of Huambo mainly as a result of the low fertility of the soils. Low-lying wetland areas planted to crops were lost in this province. In Bié, maize yields were good and in Moxico and the interior of Kwanza Sul and Benguela, maize yields were average.

In the south, in the provinces of Huila, Namibe, Cunene and Kwando Kubango, the rains started on time in the last dekad of October and the first dekad of November. In Huila and the north of Cunene and Kwando Kubango the rains were normal to above normal. In Namibe and the south of Cunene and Kwando Kubango, rains were below normal along the season. Cereal yields, mainly maize, were affected by a dry spell and, in the north of Huila, maize yields were affected by heavy rains. The south of Huila produced average to above-average yields.

3.3. Area planted

The model referred to above, and on which GSA's estimates are based, relies on the projection of the population carried out by the National Institute for Statistics. The projection is used to calculate the total number of families in the country and the number of families engaged in agriculture. The area planted to food crops is estimated by multiplying the number of farm households by the average area planted by farmers and by the cropping pattern (percentage of each crop in the fields); these two indicators must be updated every year using farm size sample surveys: however, such updating has not been carried out in the past two years.

Based on this model, the total area planted to all crops in Angola is estimated at 2 941 000 ha, which represents an increase of 15 percent over last year's planting. There are nine major food crops in Angola, namely: maize, sorghum, millet, rice, beans, groundnuts, cassava, sweet potato and potato. It is estimated that about 96 percent of the total area planted (2 833 000 ha) was devoted to these nine crops, of which cereals and pulses (including groundnuts) accounted for 64 percent of the total (1 890 000 ha; see Table A1 in the Appendix).

The area planted to cereals, pulses and groundnuts increased by about 10 percent compared with the last cropping season; cereal area grew by 9.3 percent, and maize represented 8.5 percent of this. Table 1 shows the variations in the area planted for these crops.

One important factor contributing to the increase in the area planted was the distribution of agricultural inputs (seeds and hand tools) to about 600 000 families, among whom 336 000 were assisted through partners coordinated by the FAO.

3.4. Factors affecting yields

In the northern region, yields were normal as a result of a good and regular rainfall, attaining satisfactory levels in terms of the region's potential and the local agricultural practices. Cassava yields were good in all provinces and maize yields were good to fair in some provinces. Beans and groundnuts yields were affected by the heavy rains.

In the centre, cereal yields, mainly maize, vary from province to province according to the amount of rainfall and soil quality. In the province of Huambo in the central high plain, the heavy rains, the low fertility of over-cropped soils, land preparation with hand tools and the high presence of weeds seriously affected maize yields for many households. Farmers using animal traction for ploughing and some fertilization obtained good maize yields in the same area. In the province of Bié maize yields were generally good, because of the good quality of the soils.

In the south and in the coastal area of the provinces along the Atlantic Ocean, dry weather conditions affected the yields of all crops with the exception of sections of the province of Huila and the irrigated areas in the province of Benguela.

No significant pests or diseases affecting yields were reported. In the provinces visited, the presence of cassava African mosaic was observed in the north and maize stalk borer in the centre.

3.5. Other crops

Other main food crops in Angola include cassava, sweet potatoes and Irish potatoes (roots and tubers). Cassava is the second main food crop in terms of area planted and is the main staple in the northern region. Sweet potatoes are widespread throughout the country, and Irish potatoes are concentrated mainly in the centre, where MINADER conducts a seed multiplication project in the province of Huambo. The area planted to these three food crops is shown in Table A2 in the Appendix.

Compared with the last cropping season, the area planted to these three food crops grew by about 12 percent; of which cassava grew 7.8 percent, sweet potatoes 19 percent and Irish potatoes 39 percent. Table 1 shows the variations in the area planted for these three crops.

Vegetables constitute the other food and cash crops. The main cash crops include palm oil, cotton and cashew in the north, and coconuts, sugarcane and fruit trees in the centre.

3.6. Livestock

Livestock activity in Angola, mainly cattle, is concentrated in the southern region. The provinces of Huila and Cunene have the largest herds of cattle and goats. There are no precise data on the numbers by species, but the Veterinary Services of MINADER reported about 2 500 000 head of cattle, 1 500 000 head of goats and sheep, 400 000 pigs and around 6 million poultry. Of the estimated 2.5 million head of cattle, 973 500 were vaccinated last year. Cattle constitute a very important input for land preparation; animal power is used in the southern and central provinces and more farmers are purchasing oxen for ploughing.

3.7. Cereal and pulse production forecast

Food crop production for the 2003/04 cropping season in Angola can be summarized as follows: good performance of crops in the northern provinces, normal performance in the central provinces with the exception of Huambo and poor performance in the southern provinces. Tables 3 and 4 give production estimates (including yields) for the nine main food crops at national, regional and provincial levels.

Aggregate cereal production (maize, sorghum, millet and rice) in 2003/04 is estimated at 721 000 tonnes, 9.5 percent above total cereal output of last year (see Table A3 in the Appendix), out of which maize production

is estimated at 577 000 tonnes, 5.8 percent above last year. The central region is the main cereal producing area in the country, with 56 percent of the total production, followed by the southern region with 38 percent.

The total output of beans is estimated at 76 000 tonnes, about 15 percent higher than last year, while production of groundnuts is estimated at 55 000 tonnes, representing a reduction of 9 percent compared with last year, because of low yields in the centre and south.

The production of cassava is forecast at 6 638 000 tonnes, 16 percent higher than in the 2002/03 cropping season (see Table A4 in the Appendix). The northern region is the main cassava producing area, with 84 percent of the total. Total output of sweet potatoes is estimated at 525 000 tonnes; total output for potatoes at 332 000 tonnes. These levels are 20 and 10 percent higher than last year, respectively.

3.8. Secondary season (nacas) 2003/04

During the dry season from June to August some farmers plant crops in the low-lying wet-land areas (nacas). These include mainly vegetables, maize (mostly to be consumed fresh), beans and sweet potatoes. Production of maize, beans and sweet potatoes has already been included in the total production estimates for these three crops.

4. FOOD SUPPLY SITUATION

4.1. Agricultural markets and prices

The effects of thirty years of war, including poor roads, broken bridges and the threat of land mines, have caused major obstacles for the movement of people and goods. This is especially so during the rainy season when many roads become impassable for several months of the year. Thus, although roads along the main transport corridors from the coastal belt to the interior are now open, much remains to be done before normal trade can be resumed. High transport and credit costs are also hindering trade in agricultural commodities, as traders tend to favour goods that are high in value, low in unit weight and with a very high turnover – such as small industrial consumer items, such as clothes, soap, cigarettes, tinned goods and processed foodstuffs. High transport costs have also resulted from the widespread practice of levying tolls and fees along the roads.

The market for basic foodstuffs remains fragmented as a result of this situation. However, commercial networks are slowly being reconstituted and the circulation of goods will grow significantly as the roads improve. The GSA reports some large shipments of maize from several provinces in the centre and the north, including from Huambo despite the weather problems encountered there. This emerging phenomenon should be studied and monitored to determine the conditions for expansion. Luanda will be receiving increasing supplies of cassava and beans from Uige until June, when the Kuanza Sul and Benguela crop will begin to be harvested.

In general, prices are high compared with the purchasing power of the vast majority of the population. Effective demand is low, so that a decrease in supply does not translate immediately into significantly higher prices. In November/December 2003, for instance, a sharp drop was registered in the supply of beans and maize from the lowlands (nacas) as a consequence of weather conditions. Nevertheless, in some areas like the province of Huila, where prices were monitored, prices rose only slightly or remained stable, while maize prices rose only a scant 5 percent.

Livestock prices in rural areas reflect the demand by farmers for livestock suitable for animal traction, which caused a sharp rise in livestock prices on the Caala market (the most important market in Huambo) in February/April 2003. Most cattle are bought on credit, and reimbursement often exceeds farmers' capacity in case of bad crops; this a major cause of concern for livestock raisers and another sign of poverty in the rural areas.

4.2. Cereal supply/demand balance, 2004/05

The Mission's estimate for the cereal supply/demand balance for the 2004/05 (April/March) marketing year is shown in Table 1, based on the production forecast for the 2003/04 cropping season and the latest information on cereal imports. In spite of the continuous recovery of national food production after the return of farmer refugees and IDP to their fields, overall domestic food supply continues to fall short of the population requirements. Large imports of food, including food aid, are needed to meet the minimum nutritional requirements of the population.

Data on cassava (fresh weight) is also presented in order to show the rising importance of this crop. Cassava is the main staple food in the northern provinces, and its consumption is increasing in the central and southern provinces.

On the supply side, the cereal production figures for 2003/04 include Mission forecasts for the first and second growing seasons of the current cropping season. Regarding stocks, contacts and interviews with farmers showed that no on-farm stocks existed either at the beginning or at the end of the marketing year, and no reliable information is available concerning commercial stocks of maize, rice and wheat. Hence it has been assumed that there has been no change in stock quantities.

On the demand side, the largest domestic utilization is direct food consumption for a population estimated at 15 299 000 inhabitants in mid-market year 2004/05 (estimation based on the projections of the population from the National Institute for Statistics). Per caput consumption of cereals has been estimated at 91 kg on the basis of apparent demand during the 2003/04 marketing year, considering the domestic production and imports of all cereals (see Table A5 in the Appendix). There is no precise information on other uses of cereals. Therefore, similar to last year's report, grain disappearance for seeds, animal feed and post-harvest losses has been estimated at the rate of 20 percent of domestic production for coarse grains, 10 percent for rice and 30 percent for cassava. There is no reliable information on stocks either. The balance sheet from GSA considers that opening and closing stocks were identical in all commodities, namely 10 000 tonnes of maize opening and closing stocks, 5 000 tonnes for sorghum/millet and 4 000 tonnes for rice.

As shown in Table 1, the cereal import requirement for Angola for 2004/05 is estimated at 820 000 tonnes. Of this, 190 000 tonnes correspond to commercial imports of rice and 390 000 tonnes to wheat. Imports of rice and wheat have been forecast based on last year imports and the population growth. Total import requirements for maize are estimated at 240 000 tonnes, of which 178 00 tonnes are anticipated to be in the form of food aid, with 62 000 tonnes as commercial imports.

Table 1. Angola: Food balance sheet for marketing year 2004/05 ('000 tonnes)

	Maize	Sorghum/ millets	Rice (milled)[1/]	Wheat	Total cereals	Cassava
Domestic availability	**577.0**	**123.4**	**13.0**	**-**	**713.4**	**6 638.0**
Production 2003/04	577.0	123.4	13.0	-	713.4	6 638.0
Stock drawdown	-		-	-	-	-
Domestic utilization	**824.5**	**123.4**	**192.2**	**393.2**	**1 533.3**	**6 638.0**
Food use	709.1	98.7	191.2	393.2	1 392.2	4 647.0
Other uses and losses	115.4	24.7	1.0	-	141.1	1 991.0
Import requirements	**240**	**0.0**	**190**	**390**	**820**	**-**
Commercial imports	62.0	0.0	190	390	642	
Food aid, of which:	**178.0**	**-**	**-**	**-**	**178.0**	
In stock/pipeline[2/]	70.6				70.6	
To be secured	107.4				107.4	

1/ Paddy rice converted to milled rice at a milling rate of 65 percent.
2/ WFP and CDRA.

5. NON-FOOD NEEDS ASSESSMENT – SHORT TERM

5.1. Constraints to economic recovery

The long-lasting conflict in Angola has left infrastructure in appalling conditions. Apart from the threat of land mines, the fact that many roads are virtually impassable adds very high transaction costs to economic activities. Moreover, most of the returning households have suffered a serious loss of productive assets and have shifted their livelihood patterns because of long displacement.

Following the peace process, Angola did not experience an immediate production recovery. This can be explained partially by households' lack of confidence, as they are not investing all of their resources in production. Two other factors are hampering a rapid recovery: the re-establishment and revitalization of the market in rural areas cannot take place without a genuine road network; informal if not illegal practices of demanding levies and rents are other obstacles prohibiting the re-establishment of real market economics in the country.

There is still a cautious reaction to the signs of recovery. Many people have seen previous peace agreements fail; they are waiting for concrete, positive signals that the economy is reviving in order to invest money in or resume production activities. There are also large numbers of private farms (fazendas) – some of them located in areas with good-quality soil and adequate irrigation – that have still not resumed production because their farm infrastructure was destroyed.

A rigid resettlement policy, which forces people to return only to their areas of origin and does not allow re-installation in neighbouring areas, has proved to be quite discouraging. Sometimes the areas of origin have almost no facilities or public services; they thus no longer appeal to those who had moved to the urban areas and changed their livelihood patterns. Such attitudes help explain why larger areas are not currently under cultivation, particularly around the main cities of Luanda, Bengela, Lubango and Huambo. The population in these cities has increased more than five-fold in some cases (Luanda), and the situation may very well be irreversible at this point. The same situation prevails around Huambo, where considerable numbers of people are still living in their aldeias de reassentamento.

This phenomenon is not, however, the only explanation for the slow recovery of agriculture. The major obstacle to the deployment of this sector is the poor development of rural markets and poor integration with urban markets. Factor costs also block rapid recovery. Although positive market signals (urban demand) should be stimulating an increase in supply and boost production, the negative signal of high transport costs to and from rural areas is discouraging any investment in agriculture. The extremely high costs of imported agricultural inputs, such as fertilizers and machinery, also hamper investment in agriculture and have to be analysed as constraints on households and even on private commercial farming concerns.

The main sources of inputs (fertilizer and seed) are international agencies and the government. There are no favourable conditions to develop a competitive market for agricultural inputs in the private sector and government programmes may hamper this development to some extent unless they begin to use market mechanisms. In the maize production areas, soil fertility is a major problem, particularly in the Planalto region. The scarcity of fertile land has been aggravated by intensive cultivation around temporary settlements and urban areas during the war, and this situation may well continue since some IDPs have not returned – and may never return – to their areas of origin. In cassava growing areas, land availability is not a major limitation, except for access to the nacas lowlands. The chain of knowledge has been interrupted because of forced displacement; Angolan youth live in cities and have little or no exposure to farming; the break-up of families and the need to adapt to a new environment have deteriorated human capacity, both in terms of social networks and of accumulation of knowledge within the communities.

The limited availability of labour and animal traction power, aggravated by the poor nutritional status of the returnees and of those in communities that cannot be accessed by WFP food distribution, combined with a lack of tools (since many families have received only one hoe per household) limit the expansion of cultivated area. Limited quantities and the poor quality of major staple seeds and vegetable material also limit how much land can be cultivated.

Open access to common resources such as forests and inland waters is important since these resources constitute alternative income-generating activities for the poorest segments of the population.

5.2. Traditional farming systems

Support strategies and local implementation capacity and possible implementation mechanisms are proposed here to assist the most vulnerable groups, who are recent returnees who have not completed at least two agricultural seasons and have no accumulated stocks. This group also includes those who did not monetize their production and who are thus now unable to buy inputs or face a poor or failed harvest. For these returnees, the access to a ration of food aid during the hungry period is a cushion, and the complementary ration to protect seed is important in order to enable the household to spend the necessary physical energy during the planting season and not waste their energy and labour potential in casual employment. Food aid is an important safety net that cannot be interrupted until the returning household has been able to build reserves to bridge the hungry period gap.

- An efficient transfer mechanism to the most vulnerable population so as to increase their incomes and access to food must be rapidly developed. This will stimulate the local market and trickle down as increased demand to local producers. Labour-intensive public works for feeder road rehabilitation and reconstruction of rural infrastructure could be another important safety-net mechanism to rapidly and efficiently replace food aid.

- Agricultural input distribution needs to be continued for a second agricultural season as it is still needed in the communities that have suffered from excessive rains and have not been able to save good-quality seed. Distribution of seeds and cassava vegetative material distribution could significantly contribute to an increase in cultivated area next season.
- As much as possible, the programmes should promote local seed production and use the mechanism of emergency assistance to encourage the re-establishment of local markets (see "Seeds Fairs", below). Imported maize varieties do not always adapt to the conditions of the Planalto; performance has not been very encouraging. The local seed system and the production and marketing of local varieties, such as the "Sam 3", should be encouraged.
- An immediate support to the production in the nacas lowlands, where the most severe effects of heavy rains were felt, could be decisive to ameliorate conditions during the hungry period from August to December; such support would also create local employment opportunities since horticultural crops are labour intensive.
- It is recommended that crops be monitored in 2004 while the vulnerability assessment is being carried out, so as to take advantage of the WFP network and the resources of the FAO project in GSA to gather primary data and provide a more accurate picture of the agricultural sector. The current vulnerability assessment could also be modified to a simplified exercise of cluster interviews and direct questionnaires to farmers.

6. NON-FOOD NEEDS ASSESSMENT – LONG TERM

6.1. Increasing the national budget for agriculture

The portion of the national budget currently allocated to agriculture is less than 1 percent of total state expenditures. This clearly does not allow for rehabilitation of the sector. The Government of Angola stated at the meeting of SADC's Heads of States in the United Republic of Tanzania that their objective was to raise government spending for agriculture to 10 percent of the national budget, a level considered necessary to achieve self-sufficiency and food security, as well as to alleviate poverty; this is the position taken by the African Union as well.

Setting such a goal is indeed in line with the key role to be played by the agricultural sector in the recovery of the economy and the preservation of social equilibrium, since 60–70 percent of Angolan families are subsistence farmers. It is also consistent with a vision of Angola being again a major regional agricultural power.

6.2. A supportive monetary policy

Large inflows of foreign exchange, as a result of the country's overwhelming dependence on oil exports, have caused an appreciation of the real exchange rate exceeding 40 percent since 2001. The hard currency earned through oil exports is used partly to buy up the excess Kwanza liquidity that has resulted from government spending in excess of revenues. This situation undermines the potential competitive advantage of domestic production vis-à-vis imported food products. The weight of increased competition from imports has not yet been fully felt in the interior of the country, somewhat "shielded" by the poor condition of the road network, but it is to be hoped that this situation will be temporary. Consumers' preferences for fresh, locally-grown produce should also help reduce the competition gap with respect to imports.

Angola's agricultural sector thus finds itself in a situation where it cannot reach a threshold beyond which its competitiveness would allow for efficient participation in world markets.

6.3. Marketing food products: roads and a supportive environment

Marketing is essential to agricultural development for several reasons:

- It promotes flows from surplus to deficit areas, thus improving overall food security;
- It generates income for farmers who are then able to purchase inputs and increase yields;
- It helps find outlets for marketable products thereby avoiding overproduction crises, etc.

The efficiency of the Angolan agricultural sector during the colonial era relied on an extensive network of cantineiros (local merchants and even peddlers). This capillary system was able to reach the most remote villages throughout the country with key services such as providing credit designed for the needs of smallholders, supplying inputs or basic goods like soap, transmitting technical advice, etc. This system was imperfect in many ways, but its disappearance has greatly weakened the agricultural sector. For instance,

there are virtually no loja (shops) left in the provincial capitals where farmers could buy basic inputs such as enxadas (hoes), catanas (machetes) or limas (files). Hence, people in distant locations feel isolated, and ex-farmers now living in the cities are not inclined to go back to their villages. The Mission witnessed the case of a village situated some 75 km from N'Dalatambo; going to the city to buy medicine or sell produce would require walking for 4 days, while the one-way trip by truck cost 800 Kz.(US$10). The road was of course in very poor condition and many trucks were being repaired along the way.

The damage to the economy caused by insufficient market outlet capacity will only be made worse when production levels rise and oversupply will become widespread. Local oversupply is already appearing here and there. For this reason, efforts to increase food production must be combined with market information systems, including well-documented price analysis and information dissemination.

Improved marketing will depend primarily, however, on the rehabilitation of the road network. At present traders and truckers face too many difficulties in trying to travel to rural areas to collect produce or deliver inputs. This concerns primary, secondary and tertiary roads, since trade takes place not only between Luanda and provincial capitals but also among the capitals and between capitals and the municipios.

Sound marketing also depends on whether the regulations are clear, known and acknowledged by market players and effectively applied. The Mission noted cases of "fuzzy" regulations, and the resulting effect on the movement of goods was very negative. One example is the trade of charcoal: in Malange, very few people really knew whether a tax of 100 Kz/bag was still in effect or not. Considering the high cost of transportation over even very short distances, that uncertainty strongly deterred villagers from selling charcoal.

A similar argument concerns the illegal taxes (gasosa, "lemonade"), either in kind or in cash, being levied mainly by uniformed persons at control points. These illegal levies are having a devastating effect on internal trade. Based on primary information collected from truckers, gasosa accounts for up to 25 percent of transport costs. It costs some US$1 500 – already a very high cost – to haul 24 tonnes from Luanda to Uige, over a distance of approximately 350 km; the levies alone amount to US$300.

Moreover, gasosa not only raises transport costs, but also makes the truckers' lives extremely difficult, as they must resort to complicated stratagems, such as leaving Luanda during the night so as to sneak through controls. In other words, both transfers and deadweight losses are incurred. Turn-around time has also become a major issue: repairing trucks in the capital and securing goods for the next trip (as no commercial infrastructure has been designated for this function) can take up to one full week, whereas the trip itself requires only a single day. Truckers must also bear a fiscal burden of 25 percent rate for each of the three marketing levels (producer or importer to wholesaler; wholesaler to retailer; and retailer to consumer).

Another major constraint hindering market development is the slow movement of goods through customs combined with high, variable customs duties. A rapid recovery of the agricultural sector depends on the removal – or at least the phasing out – of licenses, fees, permissions or tariffs on imported agricultural inputs. The present system entails paperwork, non-transparency of marketing channels and high cost margins, all of which means that, for example the price of imported fertilizers is at least three times higher than on world markets, or that growers are being discouraged from intensifying their cultivations.

A policy to facilitate the marketing of agricultural products will obviously include more efforts to repair the roads and bridges. Tighter quality controls over how repairs are being carried out are necessary; the poor rehabilitation of some main roads resulted in their becoming almost impassable only a few months after having been completely re-asphalted. Such controls could become a part of programmes of food-for-work.

Marketing would be facilitated if illegal levies were removed, which can only be done provided the interests that are harmed by the current situation become stronger – and more organized. This is one of the reasons why it is important that the entrepreneurial sector play a large role in the rehabilitation of agriculture because it will then be induced to exert pressure on the relevant authorities. Experience in other countries such as Mali has shown that substantial improvement can be achieved if the community of entrepreneurs begins to make the decisions.

The capacity of truckers and traders to operate under such unfavourable conditions is witness to their extreme vitality and resilience, a fact which raises high expectations for positive results when the environment in which they currently operate their business has been improved.

Freeing private initiative in marketing will also require a simplification in the bureaucracy of all kinds that merely absorbs resources and wastes time; it also transforms merchants and truckers into easy prey for corrupt officials who hold discretionary powers over them, since compliance with all of the regulations on the books is, in practice, impossible.

To obtain reliable data in the current situation, a study should be made to gather and analyse qualitative and quantitative information about the needs of truckers and merchants at the various levels of the commodity chain at which they operate (importers, transporters, wholesalers, retailers, peddlers). The study carried out by FEWSNet on marketing channels and price formation would be valuable for this research. The study should also focus on price forming in the Luanda area as the centre of demand for marketed products and on the market infrastructure it would be necessary to create mainly – but not exclusively – in Luanda. It should also comprise a feasibility study on market information (collection and dissemination of prices and marketed quantities), with a view to setting up a full-fledged market information system. The information gathered will be necessary when the rehabilitation of the road systems gradually permits a transition from a fragmented market to a homogenized one.

6.4. A dualistic approach

The Mission holds the view that the rehabilitation of the smallholder subsistence farming sector is a priority for Angola, but also believes in the emergence and expansion of an entrepreneurial sector in some places and for certain products. For some others, however, the rehabilitation of former fazendas, and more generally the expansion of large farms (sector empresarial) is seen as the top priority. This opinion has obviously been influenced by developments in the past in the Angolan agricultural sector. Large farms were money-makers and played a major – although by no means monopolistic – role in the economy, since smallholders contributed massively to Angolan exports as well, e.g. in maize. This view is also based on the assumption that only large farms afford the technological advances to boost yields and restore the country's competitiveness in agriculture. However, the development of large estates, while necessary to create a category of well-connected stakeholders in the development of agriculture – an absolute condition, in practice, to promote agriculture and tap the country's immense agricultural potential – may indeed be seriously hindered in the short and medium term by certain constraints.

Taking full heed of these constraints is essential to ensure that initial failures resulting from ill-grounded diagnosis be avoided, so that well-connected individuals will invest in agriculture and lobby in its favour. The following constraints to large farm development can be listed (some of them clearly affect smallholders as well):

- The poor condition of the road network;
- The uncertainty of the legal framework with respect to land titles;
- The massive destruction of the large farm infrastructure and processing facilities, and therefore the massive investment required to reconstitute them – an investment requiring, in addition, massive imports (whereas the promotion of smallholders will cost little, will trigger rapid yield increases since in the current situation smallholders have not invested at all because of lack of cash, and will likely be based to a large extent on domestically produced inputs);
- The high cost of large-scale irrigation, in most locations (but not in all – cf. Benguela);
- The severance of commercial ties that were used to market the products (this is less true in the coastal area);
- The profound changes in world markets affecting commodities that were cultivated during the colonial era, e.g. the shrinking world price of coffee, and therefore the high risk involved in replicating the agricultural economy of that period;
- The frequent (but not general) disappearance of technical and commercial know-how as a consequence of the war (death of farmers, non-transmission of knowledge from one generation to the next, etc.),
- The lack of experience in agriculture on the part of Angolan investors (while some already have expertise – and high stakes – in the sector),
- The reluctance of foreign investors to invest in the Angolan agricultural sector under the present and likely medium-term conditions,
- The potential negative effect of the appreciation of the local currency on the relative competitiveness of domestic production from large estates vis-à-vis imported food products – a phenomenon that will probably less affect production from small farms in the short and medium term,
- The risk of social tension in rural areas if the current poverty situation of most farmers persists. This risk may become more acute if those who are very poor observe and/or experience large estates

monopolizing investment capacity and causing the forced relocation of small farmers who have settled on the same land. Enclaves that exclude masses of rural people and do not stimulating the local economy will not be sustainable.

Therefore, the main focus – at least in the beginning – is likely to be on the rehabilitation of the smallholder sector. Apart from alleviating social tensions and poverty in rural areas and creating political stability (as is evidenced a contrario in some countries of the region), such a policy will have the strong advantage of contributing efficiently to food security in Angola. This is so because production from small farms is consumed primarily by the farmers themselves, who make up 60–70 percent of the total population. Another key reason is that productivity gains – and consequently marketable surpluses – can easily and rapidly be obtained on small farms through simple, relatively inexpensive means, such as animal traction or better access to fertilizers. Creating the agricultural production base that will enable Angola to regain food self-sufficiency and even a strong position in the region can thus be achieved rather rapidly by removing constraints to the development of small farms. One of these constraints is lack of credit; but priming the financial pump in rural areas – this expression is particularly relevant considering that smallholders currently are severely capital starved – would cost little and bring high returns.

The vision of a dualistic agricultural development should nevertheless be advocated: rehabilitation of large farms (or expansion of those that are already in operation) could also prove profitable in the current situation. A detailed identification of areas/products that are favourable for the rapid growth of entrepreneurial farming will require analysis and assessment. Obtaining the funding to carry out this research is a recommendation. Several examples of places where a dualistic agricultural development could be beneficial include:

- The Coastal Strip, particularly in Benguela (where as many as 21 000 ha are already irrigated), where sugar cane (and maize) could be grown; maize yields currently reach 12 t/ha;
- The north, where production of palm oil on a large scale is possible;
- The Planalto, where producing wheat is advisable;
- The Huila province, where commercial maize production could expand, and Huila is also suited for commercial production of poultry and livestock.

Much of the increase in production from commercial farming would obviously be use to replace imports. Angola imports large quantities of cane sugar and maize, as well as wheat. Domestic production of wheat is almost nil; some 390 000 tonnes must be imported yearly. Wheat production was high before the civil war, and thus there is still a trace of the former expertise in wheat cultivation. This favourable factor is reinforced by the awareness among many growers (and consumers) of the high nutritional value of wheat, which contains more protein than maize.

Other motivations justify the promotion of large-scale commercial agriculture. For instance, schemes for contracted small growers to bring their produce to processing factories operated by large farms are a common form of cooperation between small and large farms, particularly for high-value crops. Setting up such schemes could be envisaged for medium- or long-term operations. Another argument is that large farms do not have to be fazendas comprising thousands of hectares or even more, they can also be farms of an intermediate size, 15–40 ha for example, operated by Angolan farmers of Portuguese descent (called mestiços). These farmers are fully integrated into Angolan society, and can disseminate technical advances to surrounding smallholders (they are already playing this role in the Planalto).

If Angola is ever to regain its former position as a dominant regional agricultural exporter, as a dominant regional economic power, care must be taken not to jeopardize this potential by committing errors in the initial phase. The massive concentration of funding on the mechanization of large estates through imports of tractors operated by parastatal agencies could be just such an error. Tractors break down easily, as has been experienced in recent instances, and in other countries. The state must stay out of the input sector and leave room for private initiative to flourish, e.g. in the form of cooperatives.

For this, a distinction must be made between investments by the commercial sector, on the one hand, and investments by the state or under the control of the state, on the other. Legitimate doubts could be raised, not about making investments in large estates as such, but about investments that have not been motivated by a genuinely entrepreneurial approach. Furthermore, it must be borne in mind that failures may have a lasting negative impact on agriculture as a whole. Decision-makers may lose confidence in the expansion of agricultural production in Angola, especially since investments in agriculture often require more time to bear fruit than in other sectors.

6.5. Disseminating "best practices"

Dynamic small farmers are showing that, by using limited quantities of fertilizers, they can multiply maize yields by five or even more, with yields of up to 3 t/ha compared with 400 kg in the Planalto, where soils were thought to have been completely depleted. The Mission observed other examples during field visits in the provinces. Animal traction as opposed to manual work can increase the acreage cultivated by a family from 1–2 ha up to 5 ha or more. This advantage could be critically important, as the country has large tracts of uncultivated land. Loss of produce during transport and storage can be substantially lowered through better, though not necessarily more expensive, packaging or stacking methods.

Such methods are already available and ready to be used provided that the farmers themselves choose them and that they are not dictated from the top down. The question remains, How can this knowledge be disseminated and replicated on a nation-wide basis?

Best practices and good examples must be first identified. Secondly, well-thought pedagogical means, such as visual aids or manuals illustrated with drawings, must be produced. The experience of other countries, such as Brazil, could contribute to provide examples. Attention should be paid to the fact that most farmers are illiterate: hence the methods used must be adapted to convey the technical messages to them. This in itself requires specific technical expertise.

Organizing study tours for farmers, transporters, central or local government civil servants and NGOs is one way to visit more advanced farmers or merchants. This activity can be undertaken at low cost and produce a high "pedagogical yield". It could also favour a broader approach to agricultural problems provided that participants from various professional backgrounds, provinces and/or municipalities are effectively mixed together in such field trips.

Another recommendation is to organize competitions among growers or truckers to designate the best grower (or trucker) in one municipio, province, or even in the country as a whole. The winners would receive prizes from the authorities and, of course, fame.

Good examples can be disseminated by the media: radio, television and newspapers. Television is a very efficient channel even though the vast majority of farmers have no access to it: it informs key informants who in turn pass information on to end users – farmers in this case. Using the media can raise public awareness about agriculture, which is much needed considering the low level of awareness of agricultural problems in Angola, mainly as a consequence of the war. If agriculture is ever to become Angola's "green oil", the general public's – and decision-makers' – strong and well-informed interest in agriculture is a prerequisite.

6.6. Creating a functional extension network

The visits to the provinces showed that there are enormous needs for technical advice and monitoring in Angola. NGOs that distribute seeds on behalf of FAO, as well as WFP's field staff. are very often solicited by small growers for advice on planting practices, varieties, what to grow, at what time carry out such or such farming practices, etc. This occurs even more frequently when the farmers want to shift to new crops like vegetables. In some instances and areas, e.g. maize cultivation, farmers ignore even the traditional crop cultivation techniques.

The NGOs, WFP and FAO are not only distributing seeds. Even more importantly, perhaps, they are distributing advice and human relations: evidence indicates that growers feel "dignified" when they receive monitoring and effectively improve their skills thanks to the attention paid to them. Hence, seed distribution – and to some extent even food distribution (to returnees) – can be considered as of agricultural extension in places where there is no extension network, and as a useful tool to complement an already existing extension network where they do exist.

This is why it would be extremely helpful that the WFP network be not dismantled after WFP has completed its core task in Angola, namely food distribution. The same holds for FAO's distribution of seeds. These networks exist and function; many of their staff are trained in agriculture. As such, they could be used in future for training purposes, in connection with the Ministry's decentralized services, especially the Instituto de Desenvolvimento Agrario (Agricultural Development institute, IDA), or integrated into their staff with sufficiently motivating pay and benefits. Another solution would consist of setting up a project to support IDA's activities, and this could also provide employment opportunities to these people.

The withdrawal of food aid must be carried out in such a way that it does not impair development. If it does, then a new humanitarian problem might arise, which of course would contradict the original purpose of the aid in the first place.

One key issue in extension, however, is that training must be associated with the availability of a "package" of inputs, in particular seeds and fertilizers. Otherwise, it will lack credibility in the eyes of farmers and other trainees.

6.7. Capacity-building in the Ministry of Agriculture (MINADER)

In line with the scarce resources allocated to the agricultural sector in the government's budget, the present capacity of MINADER is insufficient to carry out the tasks involved in the ambitious agricultural policy which these recommendations strongly advocate. At the central level there should be a planning department unencumbered by purely bureaucratic functions so that it can devote all of its attention to designing policy objectives for Angolan agriculture. This department should ideally be inter-ministerial, to deal with complex issues. Staff should receive salaries commensurate with the nature of the tasks and the high academic level required. The IDA should be endowed with the resources necessary to strengthen the extension network it operates. MINADER's offices in the provinces should be allocated more resources. They are currently deprived of the minimum necessary to perform their functions.

6.8. Reforming land tenure

Here the goal is to ensure that smallholders' needs are recognized and respected. The Mission clearly observed during the visits to the field that uncertainty of land tenure deterred growers from increasing production, yields and cultivated acreage, a behaviour often described as "shyness" by NGOs and WFP agents.

Uncertain land tenure is a major constraint, especially for settlers relocated in new areas where they can hardly benefit from allocation of land through the traditional local authorities (sobas), nor do they receive any officially recognized tenure. The Mission shares the views expressed in the World Bank working document The Angolan economy: Sector policy and the agricultural sector (January 2004), as follows:

Given the rudimentary state of land registries and the fact that the laws themselves are in flux, it is somewhat premature to propose launching a nation-wide campaign of land titling. However, there is much to recommend ensuring that the rights of smallholders are respected in areas where higher levels of government seek to grant concessions to large private owners. In many cases, population growth has resulted in colonial era plantations being wholly or partly occupied by family farmers, while shifting cultivation systems in other areas make definition of holdings more difficult.

This said, free-held land will not per se solve the problem of scarce rural credit, because the quasi-inexistence of a rural financial market makes it completely impossible to mortgage land. Micro-credit schemes are also very limited at the present time, and thus access to credit is very difficult for smallholders.

This situation only strengthens the feelings of regret among many that the cantineiros have gone, as they were able to provide seasonal micro-credit to smallholders. Because the cantineiros lived in the villages or small towns, they were able to judge perfectly the ability of borrowers to repay their loans, thus reducing the risks of loan default. It follows that revitalizing the merchants will contribute to the restoration of a credit system in the villages, together with other mechanisms such as micro-credit schemes.

6.9. Suggestions to help revitalize Angolan agriculture

Promoting fertilization of impoverished soils in the Planalto: Soil fertility in the Planalto is poor at present because of it was over-exploited over a very long period of time. Transferring the population from the degraded areas to zones with vast and partially untapped land resources – like Bié – appears impossible from a social and political standpoint. Restoring the fertility of overexploited soils is a feasible solution to significantly raise yields, while remaining competitive in spite of the increased use of inputs. The advantage of fertilizer is also that it would substantially increase the crops' resistance to temporary dry spells. More fertile soil can also be obtained by means of better soil preparation (deeper ploughing), which obviously depends on the availability of animal traction (see next paragraph).

Promoting wider use of animal traction: Animal traction was widely used in agriculture before the war. Animals provided not only work for farming, but also food for the general population. In addition, livestock

contribute manure for soil fertilization; costs are low as grazing pasture was (and still is) very abundant. Pasturing fertile soils is even in some cases the first step to converting them into cultivated areas (because grazing removes the weeds). Reconstituting sizeable livestock resources would have many advantages in addition to potentially increase by three the acreage that a family can cultivate.

It seems therefore advisable to reflect on the feasibility of a very ambitious programme to re-introduce bovine livestock in the country, at least in the regions where it has virtually disappeared. Financing this programme would use only a limited share of the current oil revenues, even with costs like essential veterinary networks and physical infrastructure, without which such a programme would make little sense.

Making and using compost: This activity, highly dependent upon sufficient livestock, could be a major objective assigned to the agricultural extension network to be created. An action plan for this activity could usefully draw on other countries' experience (e.g. Madagascar, for export vegetables).

Distribution of inputs to newly resettled persons (2004/05 season) and to those particularly affected by heavy rains during the 2003/04 season: Reaching self-sufficiency in cassava takes from two to three years. While aid – and specifically food aid –cannot be extended forever, there is an even stronger priority to help those who are still far from the goal of food security. In a period marked by a reduction of aid, targeting those newly resettled in Angola and those who have been especially hit by heavy rains is a major objective.

Organizing seed fairs: The principle behind seed fairs is humanitarian distribution. Seeds are bought by farmers in exchange for vouchers remitted to them by institutions like NGOs, which are contracted by the FAO and the government to organize and promote the fairs. Sellers are seeds companies or farmers who have a surplus of multiplied seeds. Sellers subsequently exchange the vouchers for cash. Such a solution promotes the local economy and creates market links that can be useful at a later stage for selling produce. Regional experience in seed fairs is extremely valuable and should be replicated in Angola, possibly on the basis of lessons drawn from study tours.

Seed storage at village level: Traditional methods of seed storage that are still in place should be applied and replicated in places where the lack of expertise in this domain has become apparent, either because it has been lost or because storage was not practised.

Use of improved local varieties: It is evident that imported seeds are not adapted to local soil/climatic conditions or cultivation habits, or else the farmers' technical and financial capacities to use inputs needed for such varieties are lacking. Thus local seeds may be more useful. Another advantage is that local empirical selection methods are usually sufficient to significantly raise yields.

Local manufacturing of basic farming tools/equipment: As has been clearly seen in some countries like Liberia, projects aimed at promoting local manufacturing of basic cultivation tools can efficiently help restore agricultural production. The Mission observed that Angolan farmers very often lack basic tools. In a few cases, farmers' complaints could stem from an excessive dependence upon aid to provide these tools, notably when the concerned farmers visibly have the financial means to buy them. But tools really are scarce for the many cash-starved farmers. The raw materials needed to make the tools are abundant, as there is plenty of destroyed war machinery available throughout most provinces. Moreover, locally made tools are cheaper and can help activate the local economy, which is not the effect of distributing imported tools.

This type of project should necessarily include a micro-credit scheme component, as well as participation by merchants to enhance good marketing of the equipment produced.

Better coordination between NGOs and MINADER concerning the distribution of seeds: The coordinating role of local MINADER departments should be fully taken into account in their capacity of representing the authorities. They also must be endowed with human and physical means to perform their normal functions, especially extension. Lack of coordination with NGOs often results in lack of adaptation of seeds to local conditions, while MINADER should possess information on soils and climate that could help avoid errors in this area.

Crop rotation: Crop rotation – together with the use of fertilizers – is necessary to help restore fertility to the soil when it has declined from mono-cropping (e.g. maize) over a very long period. This is one of the cases where a policy of "popularization of positive examples" could prove to be especially rewarding.

Increased cultivation of mandioca and massembala: The massembala crop does not meet the country's needs at present. Therefore, it is advisable to set the objective of promoting planting in the centre (Moxico

and Huambo) and in all provinces of the south. Concerning mandioca, the aim is to facilitate the creation of nurseries for the multiplication of sticks in the centre and the south where this material is scarce. Care should, however, be taken to carry out the appropriate treatments and plant research to eradicate the virus disease that has reportedly harmed cuttings in the north.

Increased processing capacity in rural areas: As mentioned above in Section 6.4, schemes could be promoted to associate smallholders with large farms for crop processing. Another rapid and inexpensive scheme would consist of installing small cassava mills throughout rural areas (but mainly in the north) to produce cassava flour, because the technology required is simple. The equipment can be operated with an engine or by using human labour. There are many appreciable advantages to such a scheme:

- Time, especially women's time, can be saved;
- Flour can be stored for subsequent consumption, thereby improving food security;
- Marketing is easy because flour transport creates fewer problems than transport of root cassava, and storage makes it possible to wait for the appropriate period, when prices are higher; and
- The formation of producer's associations can be encouraged, providing a useful service that can be achieved only through collective collaboration.

These advantages depend, however, on the amount of credits or grants made available to producers, which would be a major prerequisite because producers in Angola are severely deprived of cash at the present time. It remains that this would be money well spent as the cassava mills would render a much-needed service at limited cost.

7. VULNERABILITY ASSESSMENT

7.1. Food security background and outlook

With the signing of the cease-fire between UNITA military forces and the Government of Angola on 4 April 2002, Angola entered a new era. During the 1998 hostilities, many people moved of their own volition or were forced to move from the rural areas to the provincial and municipal capitals and coastal areas. This population movement was particularly intense in the central and east provinces of Huambo, Bié, Moxico and Kuando Kubango.

The end of the civil war has considerably changed the nature of vulnerability to food insecurity in rural Angola. The spontaneous return of several hundred thousand Angolan IDPs and refugees during the past few years and improved access to rural communities have drastically changed household livelihood systems. Returnees and displaced families are in the process of rebuilding their livelihoods in a context of destroyed infrastructures, the absence of basic education and health services, a poor marketing system and a gradual replacement of state administrations. The humanitarian community is thus focusing on the enormous task of facilitating the reintegration of these returnees and, as a consequence, from May–October 2003, the number of WFP beneficiaries increased sharply, eventually reaching about 1.8 million people. During the rainy season, many areas became inaccessible because of poor roads, broken bridges and land-mine incidents. WFP's caseload fell; from October 2003–February 2004 almost half a million people in need of food assistance became temporarily inaccessible. From the second quarter of 2004, access to these areas may improve and – despite the harvest – the number of people in need of food assistance may sharply increase once again. Further significant movements of refugees returning to Angola are expected in 2004, with most of these expected to take place before the end of the planting season in October.

People returning to their places of origin face serious obstacles in restoring agriculturally based livelihoods. Spontaneous returnees often arrive with very few assets; assets that were abandoned during the conflict have long since disappeared or been destroyed. Basic productive assets such as seeds and tools are essential to the resettlement process. Loss of knowledge of farming practices and self-reliance skills has also been a constraint for many returnees, and the shortage of livestock available for animal traction has often been cited as a constraint to preparing adequately sized fields in most areas. Small fields and inadequate inputs led to very low production for many of the returnees during the first years of their resettlement.

Food aid and assistance with agricultural inputs have given many households the opportunity to start rebuilding their livelihoods and obtain their first or second harvest since returning. However, a significant number of returnees could cultivate for the first time only in the agricultural campaign 2003/04. Their lives depend almost exclusively on subsistence farming because of a general lack of any income-generating activities. Given these harsh conditions, it is not impossible that many returnees in the rural areas will move back to the urban areas because of the difficulty of resettling as farmers.

7.2. Objectives and methods of assessment

WFP and partners carried out a vulnerability assessment study in April-May 2004 in 11 provinces of Angola in order to assess the current situation. The study combined outcomes of the provincial VA reports with a community survey in order to assess vulnerability at provincial and regional levels and compare the two. The integration of both outcomes will serve to improve spatial and social targeting of interventions by WFP and its partners.

The provincial working groups collect information from government bodies and humanitarian agencies at provincial level by theme. Provincial level discussion provides an integrated report and a vulnerability index that assesses vulnerability by area and by social group. The index is composed of five main elements in order to determine geographic risk of food insecurity and identify the most vulnerable population groups: accessibility and population movements, agriculture, market functioning and price trends, health and nutrition, and income and coping strategies.

The survey characterizes vulnerability at regional and provincial level and provides quantitative estimations of parameters related to food insecurity vulnerability at community level. By looking at the frequency of certain events or characteristics, summary statistics such as frequency distributions, means, medians, ranges and other measures of variation are created that describe what is happening in a population in an aggregate way. This approach helps determine the type and scope of problems that rural communities in rural Angola are facing. The analysis therefore uses a spatial approach to compare provinces and describe characteristics related to vulnerability to food insecurity and their frequency at community level.

Results of the community survey are then integrated with the outcomes of the provincial reports and with secondary data obtained from various sources.

7.3. Vulnerability profile per geographical area

At national scale, agricultural production continues to increase in Angola because returnees and the resettled population are carrying out productive activities; good yields were obtained in the northern part of the country. In spite of excessive rains and poor yields in the central highlands, the global national picture is positive. Under normal climatic conditions, it is expected that this increase in global production will continue, because returnees tend to cultivate a larger area every year after their return.

It has been estimated that families that return to their homes after more than two years of displacement take an average of five years to fully re-establish their various livelihood systems. In the first year, land rights are re-established, a rudimentary shelter is built and the first area is cleared for cultivation and planted. Land that has been abandoned for several years must be cleared before it can be cultivated and the amount of previously abandoned land which can be brought back into production each year is relatively small. However, the total area under cultivation will gradually be increased each year and in the third and fourth years income may be sustainable enough to allow for a more permanent residence. This pattern will vary according to the distance from the provincial capital, the length of displacement, the degree to which the area was abandoned, etc. It is not expected that returning households will reach a degree of food self-sufficiency until the second harvest after return, as there are no significant surpluses going to the market until the third and fourth years. Hunting and gathering are also very important sources of food for these households during the re-establishment period.

The situation is most critical in the **central highlands** (Huambo, Bié and northern Huila provinces), an area of high population density where the great majority of returnees and demobilized soldiers and their families have gone; this has caused enormous pressure on limited resources. Few income alternatives exist and problematic access to land makes it difficult to earn a living. This region has the highest level of vulnerability in the country, with 790 000 persons who need food assistance; 33 percent of these are food insecure. Heavy and irregular rains aggravated an already critical situation, with total loss of the harvest in the lowlands and considerable losses in the highlands. In general, a poor transport system, dependency on subsistence agriculture, pressures on agricultural lands and poor soils in combination with limited access to agricultural inputs (animal traction or fertilizers) are the main issues for rural households. Moreover, people are forced to use negative coping mechanisms (such as sale of firewood, charcoal), which puts an additional burden on an already strained an impoverished environment. It is considered that if these practices continue at the same rate, land degradation and erosion will increase and accelerate poverty and food insecurity. The lack of productive and domestic assets among the recent returnees and resettled populations justifies a large-scale intervention focusing on agricultural extension, asset creation and income diversification.

Within the central region, the situation is most critical in Huambo province, where 73 percent of the food insecure population lives and 44 percent of the highly vulnerable. Vulnerable pockets of population groups, which do not exceed 3 percent of the total, are located in the provinces of Bié and Kuanza Sul, where crop production losses are significantly lower than in Huambo province.

In the **northeast** – primarily cassava growing areas – returnees generally have fewer problems in rebuilding their lives, because mature cassava can be harvested continuously. Farmers who are already harvesting cassava were not found among the vulnerable. Cassava requires 12 to 36 months to reach maturity; those who planted for the first time after their return are still waiting for the first harvest. In large parts of the province of Moxico the cassava crop takes up to two years to mature; resettlement and return to a sustainable livelihood takes longer. The market system is also better developed as a result of the links with Luanda, and this stimulates the production of cash crops. In the east of the region, exploitation of natural resources provides additional income. The main problem in this region is the limited access to basic services such as health and education. Assistance here should focus on external returnees from the Democratic Republic of the Congo and Zambia, who are returning after over 20 years away from Angola.

This region does not present serious problems of food insecurity; out of 147 000 persons, only 4.5 percent are food insecure. Vulnerability to food insecurity is linked to limited access to basic services and the limited circulation in the remote areas. The livelihood system is based on cassava production and in comparison with the rest of the country; markets are better developed because of the proximity of the national capital. The only exception is the province of Moxico, where problems are more diverse. The majority of food insecure people are located in Malanje; they represent, however, only 2 percent of the total food insecure in the country. This group is composed entirely of returnees. The highly vulnerable population represents 19 percent of the total. Most of them are returnees and refugees in Moxico who recently returned after more than 20 years outside the country.

The **southern region** has 139 500 persons who need food assistance; 78 percent are food insecure. Some areas in this region have suffered from irregular rains and floods, but overall weather-related problems have been minimal.

In the southern parts of Huila, cereal reserves from the previous good years and the livestock herds are providing the population with enough to cover food requirements for the rest of the year. In Kuando Kubango, however, there are fewer alternative income sources and limited access to basic services.

8. EMERGENCY/RECOVERY FOOD ASSISTANCE REQUIREMENTS

8.1. Population in need of food aid

During the three weeks spent in Angola, the Mission discussed every aspect of the current food security situation and the prospects for the coming twelve months with all relevant institutions in the government and the humanitarian community, as well as with a large number of key informants and beneficiaries in the field. The food aid needs presented in this section, duly reviewed and endorsed by the Mission, are based upon the preliminary results of the vulnerability analysis exercise carried out in April and May by the Vulnerability Assessment Groups. Members of these groups belong to governmental institutions, NGOs and UN agencies. In each of the six provinces visited by the Mission, the results of the VA exercise were discussed with a wide range of NGOs and government officials.

At the time of the previous Mission in May 2003, it was estimated that the average monthly number of people who would need food assistance during 2003/04 would be around 1.4 million. According to the findings of the Mission this year, this figure will be around 1.12 million for the period May 2004–April 2005. This significant reduction reflects the improvement in conditions following the return of large numbers of IDPs and refugees to their areas of origin, some of whom have had crops for two seasons now. The number is expected to fall sharply again following the harvest of 2005 as the second wave of returnees reaches self-sufficiency.

The only significant populations requiring continuous food assistance in 2005/2006 will be the second wave returnees in Huambo and northern Huila who lost their first crop in 2004, and the Angolan refugees in neighbouring countries who return in 2004 and for whom the 2005 harvest will be their first. These will be concentrated in Moxico, Kuando Kubango and Malange with smaller numbers in Uige and Zaire provinces. These groups will continue to require support until the harvest in 2005.

Table 2 gives the estimated numbers of people in need of food aid divided into three categories of vulnerability: food insecure, highly vulnerable to food insecurity and moderately vulnerable to food insecurity. The *food insecure* include external and internal returnees who arrived after the planting season of 2003. It is assumed that they will need a full ration for 12 months in order to survive. The *highly vulnerable to food insecurity* include those returnees who have had one harvest and who will require half cereals ration for six months and those returnees who have had one harvest, but whose harvest was destroyed or mostly lost. These will require a full ration until the harvest of 2005. It is estimated that 40 percent fall into the first group and 60 percent into the second.

The *moderately vulnerable to food insecurity* include people who need seasonal food assistance to survive the lean season and plant a crop in 2005 (mostly food-for-work) and those in nutritional, medical and social programmes who need temporary food assistance to survive or complete the treatment. It is assumed that they will need food assistance for an average of five months.

Table 2. Angola: Projected total number people who are food insecure or vulnerable to food insecurity, by province and by level of vulnerability, 2004/05

Province	Food-insecure	Highly vulnerable	Moderately vulnerable	Total
Bengo	0	27 000	13 000	40 000
Benguela	0	29 000	74 000	103 000
Bié	11 000	50 000	58 000	119 000
Cabinda	0	5 000	5 000	10 000
Cunene	0	1 000	2 000	3 000
Kuanza Norte	0	17 000	9 000	26 000
Kuanza Sul	10 000	78 000	18 000	106 000
Kuando Kubango	30 000	52 000	37 000	119 000
Huila	32 000	30 000	46 000	108 000
Huambo	245 000	329 000	180 000	754 000
Lunda Norte	0	5 000	8 000	13 000
Lunda Sul	0	8 000	15 000	23 000
Luanda	0	10 000	10 000	20 000
Malanje	7 000	23 000	35 000	65 000
Moxico	0	79 000	32 000	111 000
Namibe	0	1 000	5 000	6 000
Uige	0	5 000	14 000	19 000
Zaire	7 000	17 000	10 000	34 000
Total 2004	**341 000**	**766 000**	**576 000**	**1 683 000**
Total 2003	**1 028 000**	**865 000**	**447 000**	**2 340 000**
% change 2003/04	**-67%**	**-11%**	**+29%**	**-28%**

Note: Although VAs were not carried out in seven provinces (Cabinda, Zaire, Lunda Norte, Lunda Sul, Namibe and Cunene), estimates of the population in each of the food insecure categories were made for them. These were based on discussions with the staff of NGOs who have operations in these provinces, United Nations staff who have visited them (e.g. UN Office for the Coordination of Human Affairs) and WFP staff who either work in the provinces or who have visited them during assessment missions.

The total number of people in the food insecure category has fallen from over one million to around 340 000 since April 2003. This is a 67 percent decrease and represents a very great improvement in the level of food security within the country. reflecting the fact that many families have started to rebuild their livelihoods after one or two harvests. Many of these families have now moved from being food insecure to moderately vulnerable to food insecurity, which the rise in this category.

Many of the 1.68 million people who need some kind of food assistance during the coming year will not need it during all year; rather, they require short-term assistance to overcome seasonal shortages. In order to make valid comparisons with previous, years this figure has been adjusted to represent the average monthly number of persons who will need a full ration over the coming year. The estimated number is 1.2 million (see Table 4). An indicative full food basket needed to provide assistance is shown in Table 3; coarse cereals (mainly maize) total 178 000 tonnes.

Table 3. Angola: Food requirements for total beneficiary caseload by category, 2004–2005 (tonnes)

Population groups	Number	Adjusted 1/	Cereals	Pulses	Vegetable oil	Salt
Food-insecure	341 000	341 000	58 000	6 100	3 700	614
Highly vulnerable	306 000	77 000	13 000	1 400	800	139
Moderately vulnerable	460 000	460 000	78 000	8 300	5 000	828
Potentially vulnerable	575 000	240 000	29 000	2 900	1 800	432
Total	**1 682 000**	**1 118 000**	**178 000**	**18 700**	**11 300**	**2 013**

1/ Total number adjusted to equivalent of 12 months full ration.

Of the total monthly average of around 1.12 million, WFP expects to reach a monthly average of 909 000 persons, which represents 81 percent of the total number – note that this is not the actual number of beneficiaries (see Table 4), but rather all categories of beneficiary converted to a full monthly ration equivalent. It is expected that the remainder will receive food aid through other pipelines such as the Consortium of US Private Voluntary Organizations, direct assistance by GoA and bilateral donations through NGOs and GoA for specific programmes. It will be necessary for the government to provide assistance to food insecure and highly vulnerable populations in areas inaccessible to the humanitarian community.

Table 4 projects the estimated numbers of WFP beneficiaries by province and type of intervention. This is the number of beneficiaries by type of beneficiary, not by type of ration.

Table 4. Angola: Projected average number of food aid beneficiaries under WFP pipeline, by province and type of intervention (2004/05)

Province	Emergency 1/	RET/RES 2/	FFW/FFA 3/	Total
Bengo	1600	14 400	4 700	20 700
Benguela	16 600	25 500	12 200	54 300
Bié	4 900	124 000	6 000	134 900
Cunene	1 300	800	500	2 600
Huambo	19 000	313 000	22 000	354 000
Huila	2 900	93 000	33 300	129 200
Kuando Kubango	6 000	80 400	17 700	104 100
Kuanza Norte	5 000	30 200	9 200	44 400
Kuanza Sul	4 300	45 900	12 000	62 200
Luanda	4 100	3 800	1 100	9 000
Lunda Sul	1 400	12 900	5 200	19 500
Malange	1 000	74 800	9 800	85 600
Moxico	8 500	102 000	31 600	142 100
Namibe	800	0	600	1 400
Uige	3 700	16 600	6 500	28 800
Zaire	3 700	17 900	2 200	20 900
Total	**81 900**	**955 200**	**174 600**	**1 211 700**

1/ Nutritional, medical and social programmes
2/ Internal and external returnees
3/ Food-for-Work Programmes

An indicative full food basket required to provide assistance is shown in Table 5; coarse cereals (mainly maize) total 152 500 tonnes.

Table 5. Angola: Projected total food aid requirements for WFP Programme, by commodity and by type of intervention, 2004/05 (tonnes)

Categories	Beneficiaries	Cereals	Pulses	Vegetable oil	CSB
RETI/RETE 1/	687 500	116 400	12 360	7 425	0
	267 400	15 600	1 926	1 203	0
FFW & FFA 2/	174 600	8 500	2 625	1 637	0
Emergency 3/	81 800	12 000	1 464	883	147
Total	**1 211 300**	**152 500**	**18 375**	**11 149**	**147**

1/ Internal and external returnees.
2/ Food-for-Work Programmes.
3/ Nutritional, medical and social programmes.

8.2. Scope for local purchases

There is very limited scope for local purchases of maize for distribution to needy populations within Angola. The only area where significant quantities of maize can be purchased is around Lubango in the Province of Huila. Small surpluses available for purchase and distribution exist; however, the marketing system for buying small quantities from farmers, collecting it and treating it for commercial distribution is not well developed. Grain traders are few and they have little access to capital. It is estimated that the amount available for purchase from the 2004 harvest will not exceed 9 000 tonnes.

8.3. Logistics capacity and constraints

WFP maintains 12 provincial offices in Angola, including Luanda. This structure allows WFP to maintain and control a large logistics network for the delivery of food assistance throughout the country.

Most food is imported through the three main seaports of Luanda, Lobito and Namibe. Limited quantities of cereals and salt are locally purchased in Benguela and Huila provinces. For the PRRO, the port of Lobito is handling 56 percent of the food imports, Luanda 30 percent and Namibe 14 percent. From there the food is generally moved to WFP's primary transit storage facilities in Luanda, Lobito and Lubango. About 10 percent of the food is moved directly from the ports to extended delivery points within the provinces.

The primary warehouses located in Luanda, Lobito and Lubango are rented commercially; current capacities 19 000 tonnes in Luanda, 24 000 tonnes in Lobito and 6 000 tonnes in Lubango. Warehouse space at 12 WFP provincial offices is either commercially rented or provided by the government. WFP maintains a stock of moveable storage units that can easily be set up anywhere in the country to cater for an increased need for storage space. For provinces that are accessible only by air, WFP flies from Luanda airport and from the Catumbela airport (near Lobito) in Benguela province. The Lubango airport is also used as an air-bridge staging area as and when required.

Salt is procured locally, and limited quantities of cereals have also been procured locally in the past. It is hoped that larger quantities of cereals can be procured in Huila Province.

Since the formal cessation of hostilities in 2002, it is now possible to access all parts of the country from a security point of view. Generally, there is road access from the coastal provincial capitals to the other provincial capitals, albeit with significant challenges posed by the poor state of infrastructure.

The four outlying provinces of Kuando Kubango, Moxico, Lunda Sul and Lunda and parts of Bié – which comprise about 50 percent of the land area – are still largely inaccessible by road or rail transport. On the basis of the provincial food aid needs, WFP has been able to deliver about 85–90 percent of food aid using surface transport means. The remaining 10–15 percent must be transported by air. Transport by road during the dry season is expected to be difficult but possible. However, the situation will deteriorate during the rainy season.

Communication between towns and provincial capitals continues to be problematic because of lack of commercial transport capacity; very poor roads; broken bridges; land mines. The secondary and tertiary roads are not expected to be given priority in rehabilitation programmes as they fall outside of the mandate of the central/national road authority.

WFP has received funding from Sweden and from the European Community to repair bridges, thus access to the hard-to-reach areas continues to improve. WFP hopes to be able to eliminate air transport of food by mid-2005.

8.4. Use of ongoing food assistance programmes

The first major return of displaced households took place during 2002 following the cease-fire, consisting mainly of households returning from relatively easily accessible areas. A second major wave occurred during 2003, consisting of IDPs from more distant areas, refugees and the ex-UNITA soldiers and their families. The large majority of these families have harvested their first crops.

The humanitarian community including WFP will continue to respond to emergency needs as they emerge, with the aim of saving lives and ensuring adequate nutritional status. The Angolan emergency is both chronic and structural, and the cumulative impacts of the conflict vary from place to place. While some provinces continue to experience large influxes of population (mainly in the north and east), or are expected to receive

large numbers of refugees, other provinces enjoy relative stability. Food assistance in rural return areas will be used to complement other initiatives. Emphasis will be placed on the creation of human and physical assets in order to contribute to the creation of adequate conditions for the long-term return of populations and the achievement of self-sufficiency.

Refugees who are returning during the dry season 2004 will need support in the form of seeds, tools and food assistance during the 2004/05 agricultural campaign in order to reach a level of self-sufficiency following the 2005 harvest. Subject to availability of resources, the humanitarian community (including United Nations High Commissioner for Refugees (HCR), FAO, WFP, NGOs etc. will support these return movements through the distribution of food and non-food return packages to enable families to restore their livelihood systems and achieve food security.

Within its recovery component, WFP will provide support to return and resettlement in rural areas, through the provision of seasonal monthly food distributions for a limited period of time. The rationale behind the monthly food ration is to cover the basic needs of the returning rural populations while they re-establish their households and communities. It enables them to engage in reconstruction and carry out productive activities such as cultivation of land, planting, building shelter, etc. The establishment of productive, sustainable and stable livelihoods is thus accelerated. Concerning food-for-work programmes, WFP interventions will focus on strategic partnerships with other UN agencies in food security related sectors. FAO and WFP will together take the lead in the food and agricultural production field. It will also take the lead with respect to access to markets and social services by beneficiaries.

WFP assistance will be targeted as follows:

Recovery response

- Return packages to refugees returning to their areas of origin;
- Resettlement packages to displaced families that choose to resettle in alternative areas;
- Seed-protection rations for particularly food insecure families during the planting season;
- Food-for-work for food insecure families in areas not eligible for relief food distributions;
- Food-for-assets activities to support communities in the creation of sustainable assets, both human and physical, with special attention to women's needs for training and skills development.

Relief assistance for targeted groups

- Severely and moderately malnourished individuals in therapeutic and supplementary feeding centres. This group includes severely and moderately malnourished children under five, children aged 1–5 at high risk of mortality, and pregnant women/nursing mothers at risk of malnutrition. When the situation is acute, malnourished individuals over five will also be assisted;
- Families of children attending supplementary feeding centres will be supported with rations during the hunger gap period so as to sustain the nutritional status of the family members and to ensure adequate nutritional intake of the child after discharge from the centre;
- Children under five at risk of malnutrition will be assisted through self-targeting community kitchens;
- Individuals over five at risk of malnutrition will be assisted through community kitchens for which the MUAC screening will be the selection criterion.

APPENDIX

CROP PRODUCTION SITUATION BY REGION

There are three geographic regions and eighteen provinces in Angola: the northern region (9 provinces), the central region (5 provinces) and the southern region (4 provinces). The Mission travelled to the three regions: three provinces were visited in the north (Uige, Kwanza Norte and Malange), three were visited in the centre (Huambo, Bié and Moxico), and one province was visited in the south (Huila).

1. Northern region

Uige

Located in the northwest part of Angola, the province of Uige has a long land frontier with the Democratic Republic of Congo to the north and east of the province. It connects to the provinces of Malange, Kwanza Norte and Bengo to the south and to the province of Zaire to the west. Agricultural potential is very high as a result of normal favourable rainfall and large tracts of fertile soils. Agriculture is predominantly rainfed subsistence, characterized by intercropping and average holdings of 1.5 ha. Farming systems in this province are based on cassava, the main food crop, followed by groundnuts, beans, cereals and sweet potatoes. Fruit trees and coffee are the main cash crops.

The rains for 2003/04 season started on time in September and continued during the season until the last dekad of March. They were well distributed throughout the province, resulting in good yields for cassava and maize. The intense rains in January, and water logging in low areas, affected beans and groundnuts yields.

The total area planted to the nine main food crops is estimated at 339 000 ha, 21 percent above the previous year, of which 58 percent is cassava. The area planted to cereals, pulses and groundnuts represents 36 percent of the total. Resident farmers had enough seeds and tools and did not report any shortage of these inputs. Returnees from the Democratic Republic of the Congo and IDPs received assistance in seeds and tools from FAO and other partners. Overall, pests and diseases situations were not significant this season.

The total production of cassava in the province is expected to reach 2.2 million tonnes, 17 percent higher than last season as a result of an increase in the area planted and good yields from favourable weather conditions. The province is also expected to produce 19 000 tonnes of cereals, 19 400 tonnes of groundnuts and 11 000 tonnes of beans.

Kwanza Norte

Kwanza Norte is situated south of Uige, bordering the province of Malange to the east, the province of Kwanza Sul to the south and the province of Bengo to the west. Rainfall was well distributed and above the normal requirements for food crop production. Agriculture is rainfed subsistence farming on farms whose average size is 1.20 ha. The province is located in the cassava-based farming system area, characterized by the intercropping of food crops. The main crop is cassava, followed by maize, beans, groundnuts and sweet potatoes.

The 2003/04 rainy season started on time during the first dekad of September, but the rains were insufficient and irregular. Real planting rains started in first dekad of October and were sufficient and well distributed until the second dekad of February. There was little rain in the third dekad of February and first dekad of March; this shortage affected the development of beans. Overall, however, the rains were above normal and fairly well distributed throughout the province resulting in good yields this season.

The total area planted to the nine major food crops is estimated at 78 000 ha, 26 percent above the previous year. The area planted to cassava represents 52 percent of this total. The farmers had enough tools and seeds from the previous season and did not report any shortages. IDPs returning to their original homes were given seeds and tools by FAO and other partners. Incidences of pests and diseases were not significant this season.

Total production of cassava is expected to reach 403 000 tonnes. The province is also expected to produce 11 000 tonnes of maize, 4 000 tonnes of beans and 2 000 tonnes of groundnuts.

Malange

The province is situated south of Uige and bordered by Lunda Norte and Lunda Sul to the east, by Bié and Kwanza Sul to the south and by Kwanza Norte to the west. The province is located in the zone of the cassava based farming system, with cassava as the main food crop. The dominant agricultural practice is the intercropping. Other food crops are maize, beans, groundnuts and sweet potatoes. The average size of holdings is 1.50 ha.

As in the previous province of Kwanza Norte, the 2003/04 rains started in September but were irregular and insufficient. Regular rainfall started in the first dekad of October and was sufficient and well-distributed until the second dekad of February. Rainfall was scarce in the third dekad of February and the first dekad of March, which affected the development of beans and groundnuts. In general, the rains were above normal and well-distributed in the province and encouraged good yields.

The total area planted to the major food crops is estimated at 201 000 ha (18 percent above the previous year); the area planted to cassava is 51 percent. The farmers had enough seeds, and IDPs received seeds and tools from FAO and other partners for this crop season. Cassava African mosaic was observed in some cassava fields. No other significant pests and diseases were reported.

The total production of cassava in the province is expected to reach 1 023 000 tonnes, 15 percent higher than last season. This increase results from larger areas planted and good yields after favourable weather conditions. The province is expected to produce 33 000 tonnes of maize, 7 000 tonnes of beans, 5 000 tonnes of groundnuts and 50 000 tonnes of sweet potatoes.

2. Central region

Huambo

The province of Huambo is located in the central high plain of Angola. It borders the provinces of Kwanza Sul to the north, Bié to the east, Huila to the south and Benguela to the west. Weather conditions (rainfall and temperature) are generally favourable for agriculture in the high plain. The average farm holding is 1.50 ha; the province is located within the maize/cereals-based farming system area. The main food crops are cereals, mainly maize, followed by beans, groundnuts, potatoes, sweet potatoes and cassava.

The 2003/04 rainy season started in the second dekad of September and continued well distributed and sufficient until the third dekad of December. In January heavy rains fell practically every day until the first dekad of February. This situation affected the yields of all crops, mainly maize, as the result of a combination of factors such as the low fertility of over-cropped soils, insufficient land preparation, percolation of nutrients because of the rains and proliferation of weeds that were practically out of the farmers' control. On the other hand, the farmers preparing land and weeding with animal traction and applying fertilizers obtained good yields in the same areas.

The total area planted to the main food crops is estimated at 529 000 ha (16 percent higher than last year) of which cereals account for 67 percent. Farmers had enough tools and seeds, and no shortages were reported. IDPs were supplied with seeds and tools from FAO and other partners. Sections of low-lying fields were waterlogged; crops were lost in these places. Maize stalk borer was reported to affect maize, but the attacks were not significant.

Total cereal production in the province is expected to reach 144 000 tonnes, 16 percent lower than last season, because of low yields and in spite of the increase in areas planted. The province is also expected to produce 11 000 tonnes of beans, 3 000 tonnes of groundnuts, 121 000 tonnes of cassava, 151 000 tonnes of sweet potatoes and 117 000 tonnes of Irish potatoes.

Bié

This is one of the provinces of the Angolan central high plain with highest agricultural potential. A vast plain with fertile soils and a network of the tributaries of the main rivers of Angola have created fertile valleys in the interior. Bié province is situated in the centre of Angola and it is surrounded by the provinces of Malange, Lunda Sul, Moxico, Kuando Kubango, Huila, Huambo and Kwanza Sul. The main food crop is maize; others are sorghum, beans, groundnuts, cassava, potatoes and sweet potatoes, with lesser quantities of rice. The average farm size is about 1.40 ha.

Rainfall was similar to Huambo, but effect on yields was different because of the good soils in this province.

The total area planted to the main food crops is estimated at 301 000 ha (8 percent higher than last season); cereals represent 64 percent of the total area plated. Resident farmers had sufficient tools and seeds; IDPs received seeds and tools from FAO and other partners for their first and/or second planting. No major shortages of agricultural inputs were reported. Incidences of pests and diseases were not significant here this season.

Total production of cereals is expected to reach 97 000 tonnes, about 47 percent higher than last season as a result of the increase in area planted and good yields. About 9 000 tonnes of beans, 4 000 tonnes of groundnuts and 124 000 tonnes of fresh cassava are expected.

Moxico

Moxico province borders the Republic of Zambia to the east, the province of Kuando Kubango to the south, the province of Bié to the west and the province of Lunda Sul to the north. Cassava is the main food crop, followed by cereals (maize, sorghum, millet and rice), beans, groundnuts, sweet potatoes and Irish potatoes. Average farm size is about 1.50 ha.

The rains started in the third dekad of October and were normal and well distributed throughout the season. Only in January were rains above normal in most parts of the province.

The total area planted to the main food crops is 114 000 ha (20 percent above the previous year), of which cassava represents 44 percent and cereals 23 percent. There were no problems with tools or seeds reported by resident farmers; IDPs received seeds and tools from FAO and other partners.

Cassava production is expected to reach 350 000 tonnes, 15 percent higher than last season. The province is also expected to produce 22 000 tonnes of cereals, 2 000 tonnes of beans, 4 000 tonnes of groundnuts and 30 000 tonnes of sweet potatoes.

3. Southern region

Huila

Located in southwest Angola, the province of Huila is bordered by Benguela and Huambo to the north, Bié and Kuando Kubango to the east, Cunene to the south and Namibe to the west. The province has diverse types of soils and a variable rainfall pattern from north to south: the north is rainier and the south is drier. The main food crop is maize, followed by sorghum and millet, beans, groundnuts, Irish potatoes, sweet potatoes and cassava. Average holdings size is 2.00 ha and many farmers use animal traction, improved seeds and fertilizers.

This season the rainfall started in October in the north and in November in the rest of the province. In December and January the rains were heavy throughout the province; this continued until mid-February in the north, affecting maize yields in Caconda and Chipindo. In the south, a period of dry spells in February and March affected maize yields.

The total area planted to the main food crops is estimated at 425 000 ha (34 percent above the last year); cereals represent 71 percent. Farmers had enough agricultural inputs including oxen for land preparation; IDPs received seeds and hand tools from FAO and other partners. No significant pests and diseases were reported.

Total production of cereals in the province is expected to reach 197 000 tonnes, which is 30 percent higher than last season. The increase is from expansion in the area planted. The province is expected to produce 13 000 tonnes of beans, 5 000 tonnes of groundnuts, 68 000 tonnes of fresh cassava, 89 000 tonnes of Irish potatoes and 42 000 tonnes of sweet potatoes.

Table A1. Angola: Area planted to cereals, pulses and groundnuts, by province (ha), cropping season 2003/04

Province	Total (cereals, pulses & groundnuts)	Maize	Sorghum/ Millet	Rice	Beans	Groundnuts
Total	**1 890 381**	**1 067 773**	**305 650**	**11 421**	**332 333**	**173 204**
NORTH	**325 797**	**118 401**	**-**	**4 308**	**102 005**	**101 083**
Cabinda	15 571	4 013	-	-	4 816	6 742
Zaire	9 147	2 741	-	-	4 111	2 295
Uige	121 841	17 992	-	3 095	35 984	64 770
Bengo	24 299	11 390	-	-	9 112	3 797
Luanda	2 039	1 610	-	-	429	-
Kwanza Norte	35 478	17 739	-	-	12 901	4 838
Malange	87 961	51 140	-	-	24 547	12 274
Lunda Norte	14 483	5 793	-	1 159	4 055	3 476
Lunda Sul	14 978	5 983	-	54	6 050	2 891
CENTRE	**944 286**	**675 957**	**45 610**	**7 113**	**166 775**	**48 831**
Kwanza Sul	114 983	79 359	-	-	26 806	8 818
Benguela	87 761	58 507	18 430	-	9 751	1 073
Huambo	439 340	334 735	19 805	-	72 526	12 274
Bié	250 599	185 480	6 183	201	46 370	12 365
Moxico	51 603	17 876	1 192	6 912	11 322	14 301
SOUTH	**620 298**	**273 415**	**260 040**	**-**	**63 553**	**23 290**
Namibe	9 547	4 665	3 797	-	1 085	-
Huila	373 849	232 336	69 701	-	50 691	21 121
Cunene	145 824	9 308	133 413	-	3 103	-
Kuando Kubango	91 078	27 106	53 129	-	8 674	2 169
***Area planted* 2002/03 season**	**1 720 584**	**984 110**	**274 767**	**7 867**	**295 687**	**158 153**
2003/04 season, in comparison with 2002/03 season (%)	**+9.87**	**+8.50**	**+11.24**	**+45.18**	**+12.39**	**+9.52**

Source: GSA/MINADER and Mission estimates.

Table A2. Angola: Area planted to other main food crops, by province (ha), cropping season 2003/04

Province	Total (roots & tubers)	Cassava	Sweet potatoes	Irish potatoes
Total	**936 253**	**694 040**	**138 797**	**103 416**
NORTH	**606 613**	**553 363**	**51 370**	**1 880**
Cabinda	18 460	16 855	1 605	-
Zaire	19 869	17 814	2 055	-
Uige	216 981	197 910	17 272	1 799
Bengo	43 280	37 965	5 315	-
Luanda	2 898	2 898	-	-
Kwanza Norte	42 816	40 316	2 419	81
Malange	113 326	102 280	11 046	-
Lunda Norte	99 641	92 689	6 952	-
Lunda Sul	49 342	44 636	4 706	-
CENTRE	**262 467**	**123 554**	**63 048**	**75 865**
Kwanza Sul	57 668	38 798	5 291	13 579
Benguela	1 950	1 950	-	-
Huambo	89 821	17 295	33 474	39 052
Bié	50 698	15 457	12 365	22 876
Moxico	62 330	50 054	11 918	358
SOUTH	**67 173**	**17 123**	**24 379**	**25 671**
Namibe	1 084	-	976	108
Huila	50 692	8 449	16 897	25 346
Cunene	-	-	-	-
Kuando Kubango	15 397	8 674	6 506	217
***Area planted* 2002/03 season**	**834 573**	**643 840**	**116 606**	**74 127**
2003/04 season, in comparison with 2002/03 season (%)	**+12.18**	**+7.80**	**+19.03**	**+39.51**

Source: GSA/MINADER and Mission estimates.

Table A3. Angola: Production and yields for cereals, pulses and groundnuts, by province, cropping season 2003/04

Province	Production/Yields	Maize	Sorghum / Millet	Rice (paddy)	TOTAL CEREALS	Beans	Ground-nuts
Total	**Prod. (t)**	**576 917**	**123 415**	**20 620**	**720 952**	**75 965**	**54 732**
NORTH	**Prod. (t)**	**78 945**	**-**	**6 394**	**85 339**	**29 265**	**33 777**
Cabinda	Prod. (t)	3 210	-	-	3 210	1 445	3 371
	Yield (t/ha)	0.80				0.30	0.50
Zaira	Prod. (t)	1 644	-	-	1 644	1 233	803
	Yield (t/ha)	0.60				0.30	0.35
Uige	Prod. (t)	14 393	-	4 642	19 035	10 795	19 431
	Yield (t/ha)	0.80		1.50		0.30	0.30
Bengo	Prod. (t)	8 542	-	-	8 542	3 189	1 519
	Yield (t/ha)	0.75				0.35	0.40
Luanda	Prod. (t)	805	-	-	805	129	-
	Yield (t/ha)	0.50				0.30	
Kwanza Norte	Prod. (t)	10 643	-	-	10 643	3 870	2 177
	Yield (t/ha)	0.60				0.30	0.45
Malange	Prod. (t)	33 241	-	-	33 241	7 364	4 909
	Yield (t/ha)	0.65				0.30	0.40
Lunda Norte	Prod. (t)	3 476	-	1 738	5 214	1 217	1 564
	Yield (t/ha)	0.60		1.50		0.30	0.45
Lunda Sul	Prod. (t)	2 991	-	14	3 005	23	3
	Yield (t/ha)	0.50		1.50		0.35	0.40
CENTRE	**Prod. (t)**	**322 355**	**23 114**	**14 226**	**359 695**	**31 556**	**15 024**
Kwanza Sul	Prod. (t)	47 615	-	-	47 615	6 701	3 527
	Yield (t/ha)	0.60				0.25	0.40
Benguela	Prod. (t)	40 955	9 215	-	50 170	2 438	429
	Yield (t/ha)	0.70	0.50			0.25	0.40
Huambo	Prod. (t)	133 894	9 903	-	143 797	10 879	3 068
	Yield (t/ha)	0.40	0.50			0.15	0.25
Bié	Prod. (t)	92 740	3 400	402	96 542	9 274	3 710
	Yield (t/ha)	0.50	0.55	2.00		0.20	0.30
Moxico	Prod. (t)	7 151	596	13 824	21 571	2 264	4 290
	Yield (t/ha)	0.40	0.50	2.00		0.20	0.30
SOUTH	**Prod. (t)**	**175 617**	**100 301**	**-**	**275 918**	**15 144**	**5 931**
Namibe	Prod. (t)	2 099	1 519	-	3 618	271	-
	Yield (t/ha)	0.45	0.40			0.25	
Huila	Prod. (t)	162 635	34 850	-	197 485	12 673	5 280
	Yield (t/ha)	0.70	0.50			0.25	0.25
Cunene	Prod. (t)	1 396	40 024	-	41 420	465	-
	Yield (t/ha)	0.15	0.30			0.15	
Kuando Kubango	Prod. (t)	9 487	23 908	-	33 395	1 735	651
	Yield (t/ha)	0.35	0.45			0.20	0.30
2002/03 season (t)	**Production**	**545 150**	**97 402**	**15 607**	**658 159**	**66 121**	**60 190 (*)**
2003/04 season, in comparison with 2002/03 season	**% change**	**+5.83**	**+26.71**	**+32.12**	**+9.54**	**+14.89**	**-9.07**

Source: GSA/MINADER and Mission estimates.

Table A4. Angola: Production and yields for other main food crops, by province, cropping season 2003/04

Province	Production/ Yields	Cassava	Sweet potatoes	Irish potatoes
TOTAL	**Prod. (t)**	**6 637 623**	**525 089**	**331 561**
NORTH	**Prod. (t)**	**5 553 345**	**210 163**	**3 759**
Cabinda	Prod. (t)	168548	8 026	-
	Yield (t/ha)	10.00	5.00	
Zaira	Prod. (t)	178 139	9 250	-
	Yield (t/ha)	10.00	4.50	
Uige	Prod. (t)	2 177 008	69 089	3 588
	Yield (t/ha)	11.00	4.00	2.00
Bengo	Prod. (t)	341 685	21 260	-
	Yield (t/ha)	9.00	4.00	
Luanda	Prod. (t)	26 078	-	-
	Yield (t/ha)	9.00		
Kwanza Norte	Prod. (t)	403 158	9 676	161
	Yield (t/ha)	10.00	4.00	2.00
Malange	Prod. (t)	1 022 804	49 708	-
	Yield (t/ha)	10.00	4.50	
Lunda Norte	Prod. (t)	834 198	24 331	-
	Yield (t/ha)	9.00	3.50	
Lunda Sul	Prod. (t)	401 727	18 823	-
	Yield (t/ha)	9.00	4.00	
CENTRE	**Prod. (t)**	**955 971**	**257 231**	**238 496**
Kwanza Sul	Prod. (t)	349 179	21 162	40 738
	Yield (t/ha)	9.00	4.00	3.00
Benguela	Prod. (t)	11 701	-	-
	Yield (t/ha)	6.00		
Huambo	Prod. (t)	121 063	150 631	117 157
	Yield (t/ha)	7.00	4.50	3.00
Bié	Prod. (t)	123 653	55 644	80 065
	Yield (t/ha)	8.00	4.50	3.50
Moxico	Prod. (t)	350 375	29 794	536
	Yield (t/ha)	7.00	2.50	1.50
SOUTH	**Prod. (t)**	**128 307**	**57 695**	**89 306**
Namibe	Prod. (t)	-	2 441	271
	Yield (t/ha)		2.50	2.50
Huila	Prod. (t)	67 589	42 243	88 710
	Yield (t/ha)	8.00	2.50	3.50
Cunene	Prod. (t)	-	-	-
	Yield (t/ha)			
Kuando Kubango	Prod. (t)	60 718	13 011	325
	Yield (t/ha)	7.00	2.00	1.50
2002/03 season (t)	**Production**	**5 699 331**	**438 508**	**301 804**
2003/04 season, in comparison with 2002/03 season	**% change**	**+16.46**	**+19.74**	**+9.86**

Source: GSA/MINADER and Mission estimates.

Table A5. Angola: Per caput consumption estimates

	Tonnes	kg/cap 2004/05	kg/cap 2003/04
Coarse grain production 2002/03 (food use)	514 000		
Maize imports 2003	266 000		
Total coarse grains	**780 000**	**52.81**	**50.20**
Rice production 2002/03 (milled – food use)	17 000		
Rice imports 2003	168 000		
Total rice	**185 000**	**12.53**	**10.40**
Wheat imports 2003	**380 000**	**25.73**	**25.70**
TOTAL CEREALS	**1 345 000**	**91.07**	**86.30**
Population 2002/03	**14 769 000**		
Total cereals consumption 2002/03	**91 kg per caput per year**		

This report has been prepared by T. Aube, A. Olivares, C. Amaral, L. Verelst and I. McDonald under the responsibility of the FAO and WFP Secretariats with information from official and other sources. Since conditions may change rapidly, please contact the undersigned for further information if required.

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