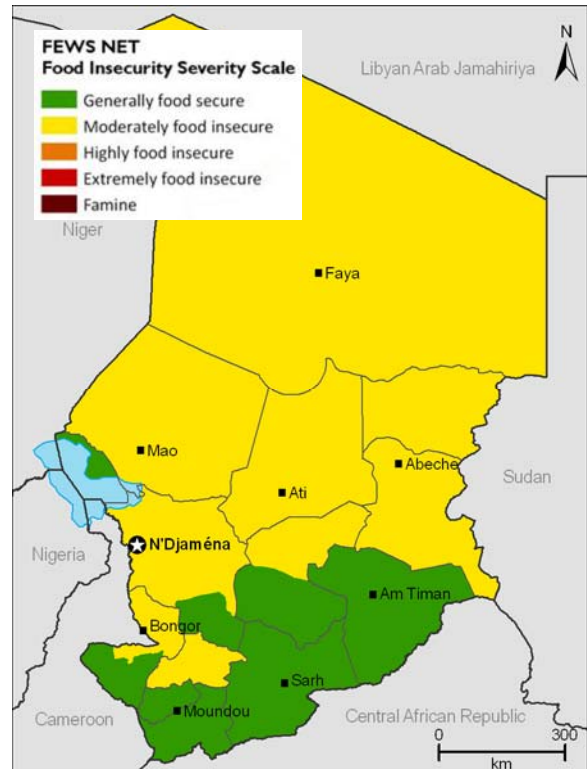


CHAD Food Security Update

November 2009

- An evaluation of agro meteorological data for the 2009 rainy season shows rainfall deficits in most crop producing areas. The findings by the joint FAO/CILSS/FEWS NET/WFP pre harvest assessment mission for the 2009/10 growing season put grain production down 31 percent from last year and 34 percent below the five year average. The Sahelian zone and the central western reaches of the southern zone are especially hard hit by this deficit.
- On the whole, a look at the countrywide food security situation shows moderately good conditions. In the face of large ongoing harvests, staple grain prices have been trending steadily downwards since August of this year. However, price levels are still above the five year average (2004/05 2008/09) due to a sustained rise in prices in 2008/09 and a worrisome food security outlook for the current growing season.
- Pastoralists and agropastoralists are facing poor pastoral conditions for the second consecutive year and shortfalls in milk and meat production, particularly by large animals. Terms of trade for small animals/grain have improved since August/September in anticipation of the yearend holiday season. However, the current poor physical condition of large animals due to shortages of animal feed and the decline in demand from Nigeria with the poor exchange rate for the Nigerian naira vis à vis the CFA franc are driving down prices for large animals and eroding terms of trade for large animals/grain. The hunger season in pastoral areas is expected to begin earlier than usual, or by April of next year.

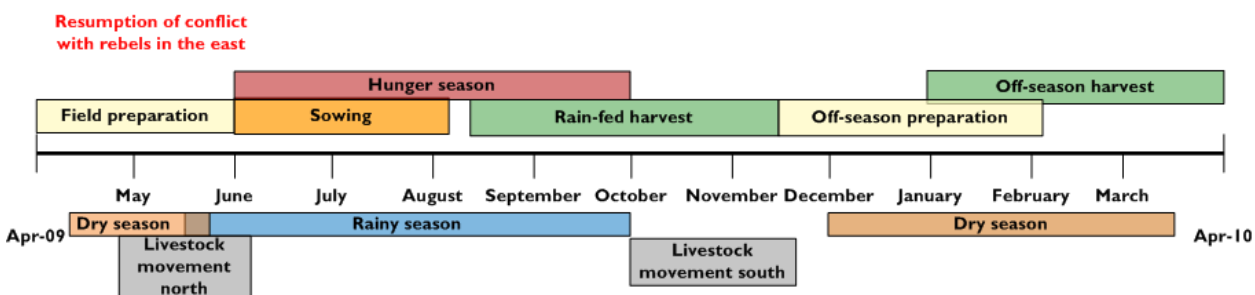
Figure 1. Food security assessment for November 2009



Source: FEWS NET Chad

For more information about FEWS NET's food insecurity scale, visit: www.fews.net/FoodInsecurityScale

Seasonal calendar and timeline of critical events



Source: FEWS NET Chad

Current food security overview

The preliminary findings by the joint FAO/CILSS/FEWS NET/WFP pre harvest assessment mission for the 2009/10 growing season in Chad conducted over the period from October 18th through October 24th of this year put grain production down 31 percent from last year and 34 percent below the five year average. The grain balance sheet emerging from the Accra meeting in November of this year shows a 741,705 metric ton net grain deficit. However, the inclusion of other types of food crop production (tubers, pulses, oilseeds, vegetables, etc.) could mitigate the impact of this deficit on the satisfaction of nationwide grain needs.

Off season crop production in major crop producing areas such as Salamat normally creates a large surplus (of over 200,000 MT), which is used to offset any grain deficits through trade. However, the plunge in *berbéré* production to a mere fifth of its five year average figure, according to current forecasts, will considerably reduce the size of the grain surplus in this area and, as a result, domestic grain supplies. Moreover, in addition to the projected production shortfall in areas transplanted in *berbéré* (flood recession) crops, there are signs of a water shortage in plain areas planted in crops and of the presence of grain eating birds. As a result, current forecasts are predicting mediocre yields in these areas. There is already a heavy demand for grain for the rebuilding of grain reserves, reflecting the concern on the part of consumers and traders over the prospect of a sizeable shortfall in off season grain production.

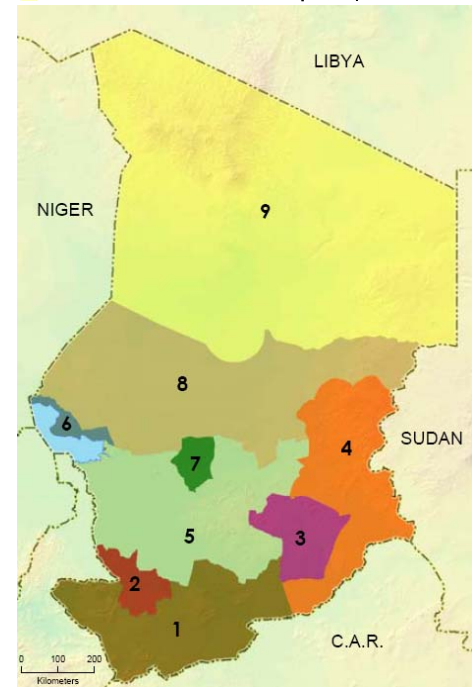
There are continuing concerns in transhumant pastoral areas (Kanem and northern Batha and Biltine) over the food access of at risk urban households and rural households in food insecure areas. The relative improvement in terms of trade since August with the good performance of small animals, falling grain prices during the current harvesting season and, in particular, the rise in prices for small animals in the weeks leading up to the year end holiday season (Tabaski, Christmas, and New Years) cannot last. Moreover, large animals have never fully recovered from the last hunger season. This state of affairs points to unfavorable terms of trade by early next year and food access problems, particularly for poor households in agropastoral and transhumant pastoral areas. These households, currently classified as moderately food insecure, will be facing an earlier than usual "pastoral" hunger season beginning in April of next year, with high levels of food insecurity.

Grain imports are essential to prevent a sharp rise in prices. However, not one country in the subregion stretching from eastern Mali to eastern Chad, and including northern Cameroon, has been spared from feeling the effects of the current mediocre growing season. Cameroon's nationwide surplus will be used for the benefit of residents of northern areas of the country through strict control measures limiting normal exports to Chad. There are no prospects of any change in the usual pattern of trade with the Central African Republic, with food exports outstripping imports. Thus, with no possibility of any large inflow of imports from area countries, a sustained rise in prices is likely, particularly with the hunger season expected to begin by as early as April of next year. The government's plans to build up the national food security reserve to at least 35,000 MT do not even come close to remedying this situation.

As for conditions in livestock raising areas, the drying up of watering holes and the deterioration in the condition of pasturelands in most agropastoral areas have prompted livestock to head south earlier than usual, creating large concentrations of animals in the southern part of the country, which could rekindle latent conflicts between farmers and pastoralists over access to natural resources.

Figure 2: Livelihood zone map of Chad

- 1 Southern cotton and groundnuts cash crop zone
- 2 Southern rice cash crop zone
- 3 Southeast flood-retreat cultivation zone
- 4 Eastern rain-fed cereals zone
- 5 Western agro-pastoral zone
- 6 Central agro-pastoral and fishing zone
- 7 Central flood-retreat cultivation and fishing zone
- 8 Northern transhumant herding zone
- 9 Northern camel, date and salt (natron) zone



Source: FEWS NET Chad

Progress of the growing season

An evaluation of agro meteorological data for the 2009 rainy season shows rainfall deficits in most crop producing areas. These rainfall deficits and the poor spatial temporal distribution of rainfall are clearly to blame for the poor crop performance for the 2009/10 growing season for rainfed crops and the less than promising outlook for off season crops and pastoral conditions. The shortened rainy season ending by the second dekad of September in all parts of the Sahelian zone prevented grain crops from maturing normally. Certain parts of the Sahelian zone reported sporadic rainfall in the third dekad of October, which only served to rot dry grasses and mature crops (groundnuts, cowpeas) waiting to be harvested.

Harvests of short and medium cycle rainfed crops are currently underway in the Sudanian zone. This area also saw light rainfall in the third dekad of October. These late season rains were a good source of water for long cycle grain crops, enabling them to develop normally. Thus, late season sorghum and pearl millet crops are in anywhere from the flowering to the maturity/milk grain stage, rainfed rice crops are in the maturation stage, and groundnut and corn crops are in the maturation harvesting stage.

Condition of pasturelands

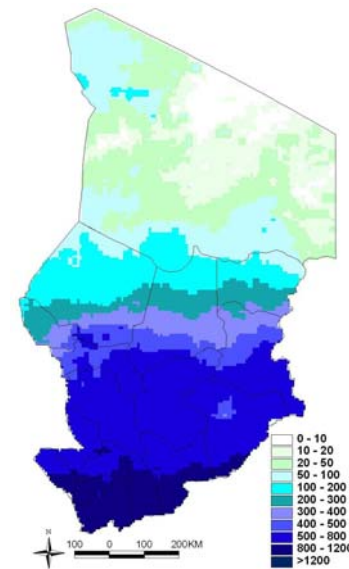
A look at biomass conditions in the third dekad of October of this year shows much of the vegetation in agropastoral and transhumant pastoral areas already dry. In the Sahelian zone, the dry pasture front is moving southwards, crowding out fresh pasture, particularly in the far southern reaches of the Sahelo Sudanian zone.

The Normalized Difference Vegetation Index (NDVI) for the third dekad of October (Figure 3) shows a small area of thick vegetation in good condition on the southern edge of the Sahelian zone. A comparison of the NDVI with the short term average shows very sparse vegetation in the Sahelian zone, particularly in Wadi Fira, Eastern Batha, and Dagana department. The rainfall activity in the third dekad of October kept herbaceous vegetation green in the southern part of the country but, according to pastoralists, was harmful to dry pasture.

Markets and trade

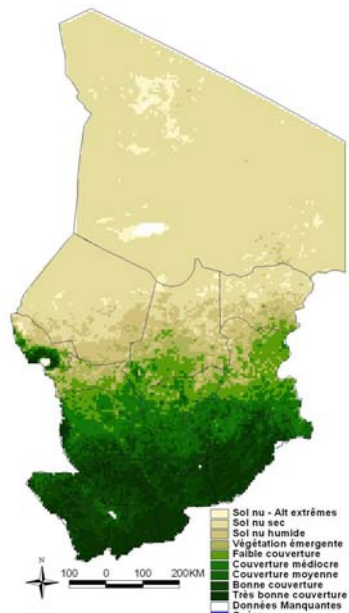
October supplies on three of the four major grain markets monitored by FEWS NET were relatively good thanks to ongoing harvests of rainfed crops. Prices for the two main grain crops sold on the N'Djamena, Moundou, and Sarh markets, namely pearl millet and sorghum, moved steadily downwards in the face of adequate market supplies. However, the poor production forecast for ongoing harvests kept supplies low on the Abéché market, the second largest market in the Sahelian zone after the capital, where pearl millet prices continued to climb. A comparison with previous years shows October prices for all major food crops on most domestic markets still above the five year average for 2004/05 2009/10 and prices for the 2004/05 season (see the price annex).

Figure 3. Satellite image of cumulative rainfall (RFE) anomalies for the 2009 season as of the 3rd dekad of October 2009, compared with the 2001-08 average



Source: FEWS NET/USGS

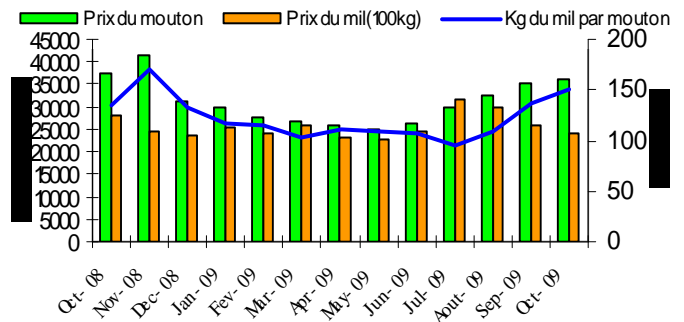
Figure 3. Satellite image of the condition of vegetation for the 3rd dekad of October 2009



Source: FEWS NET/USGS

The combination of high prices and quasi identical, relatively ineffective income diversification strategies is weakening the purchasing power of poor rural and urban households which, in turn, is curtailing their food access. The steady rise in pearl millet prices on the Abéché market, the main food crop consumed in the Ouaddai region, is limiting purchasing and the rebuilding of food reserves by poor and moderate income farm families. Their poor grain harvests for the 2009/10 growing season for rainfed crops are making this group of households increasingly dependent on the market to round out their food supplies, which is weakening their food access.

Figure 4: Terms of trade for sheep – pearl millet on



the N'Djamena market

Source: SIM/FEWS NET Chad

Translation Notes: Prix du mouton – Price of sheep; Prix du mil – Price of millet; Kg du mil par mouton – Kg of millet for sheep

The price of an average sheep sold on the N'Djamena market has been steadily climbing since August as a result of the good physical condition of small animals and favorable price trends sustained by preparations for the upcoming year end holiday season (Tabaski, Christmas and New Years). However, there was relatively little growth in prices towards the end of October with the decline in demand for live animals for terminal fattening and the high cost of animal feed. Pearl millet prices on this same market have been trending steadily downwards with the incoming supplies from different grain producing areas. Terms of trade are still in favor of pastoralists, with the grain equivalent for an average sheep up by 14 kg of millet from last month and by 55 kg of millet compared with the unfavorable price ratios of July of this year, at the height of the hunger season. A comparison with terms of trade in October of last year shows a gain of 16 kg of pearl millet per sheep sold at the same time this year. This improvement in terms of trade is strengthening the immediate food access of poor and average pastoralist and agropastoralist households, but its impact is limited at best. In fact, the traditional coping strategies of grain short pastoralist and agropastoralist households are designed to take advantage of conditions at this time of year to rebuild most household food reserves with proceeds from sales of large animals. However, the mediocre physical condition of large animals still recovering from the last hunger season and the depreciation in the exchange rate for the Nigerian currency (the naira) vis à vis the CFA franc have driven down the price of large animals, which is limiting the ability of pastoralists and agropastoralists to rebuild their grain reserves.

