Food Security and Humanitarian Implications in West Africa and the Sahel

N°80 - December 2016—January 2017

KEY POINTS

Sections

Agriculture

Displacements

International Markets

West Africa Markets

Food Security

To go to the section

- Food situation remains good in the region with new harvests. The off season crop campaign in the region is ongoing.
- Niger recorded a forage production deficit.
- Locust infestation decreased in December in the areas affected by recent resurgences in Mauritania.
- The FAO food price index dropped for the fifth consecutive year.

The agro pastoral prospects are globally positive in West Africa and in the Sahel, causing an increase of supply and a seasonal decline of prices across most of the region's markets.

In Cameroon, the 2016 cereal production showed an overall decrease compared to the previous campaign, particularly in the Extreme-North region (-25 percent) as a result of the Boko Haram crisis.

The start of the off-season crop campaign in the region could contribute to the improvement of product availability as observed during the main season.

With the exception of Niger, the livestock farming conditions in the region is characterized by pastures that are still overall well supplied and water point levels that favor better livestock conditions. Niger recorded a general fodder production deficit; the pastoral situation requires more attention during this year.

Recommendations for regional partners

→ Continue to monitor the food and nutrition security situation, especially in the Lake Chad Basin;

→ Monitor the food situation of Northern Nigeria: North-East (humanitarian crisis) and North-West (rising prices);

→ Advocate for the funding and implementation of response plans in Nigeria's three northeastern states (Adamawa, Borno and Yobe);

→ Advocate for the funding of food and nutrition security projects included in the 2017 HRP;

→ Raise awareness among partners to participate in the joint market assessment missions and the Cadre Harmonisé analyses in West Africa/Sahel.

Objective: Within the framework of the monthly meetings of the Food Security and Nutrition Regional Working Group for West Africa, from a humanitarian perspective, FAO and WFP inform the group with highlights on the food security situation of the previous month.

2016-2017 Agropastoral Campaign

Confirmation of good agropastoral production

The 32nd meeting of the Sahel and West Africa food crisis prevention network (RPCA) held in Abuja/Nigeria from December 12 to 14, 2016 validated the cereal production prospects in the Sahel and West Africa set at 66.1 million tons, an increase of 3.2 percent from the 2015 - 2016 campaign, and 15.5 percent compared to the last five-year average. The meeting also confirmed the cereal production decline recorded in Liberia (-8.8 percent) and Mauritania (-16.9 percent) compared to the previous campaign.

The 2016 main agricultural campaign was characterized by the end harvest of dry cereals and legumes, the ongoing harvest of rice in irrigated perimeters and the effective start of the off season crop campaign.

In Agadez (Niger), the agricultural season is characterized by the start of onion commercialization with supply currently exceeding demand, justifying the abrupt price drop; and by a decrease of cash crop activities due to the difficulty to regenerate sites that had been hit by floods during the previous rain season causing major loss of productive assets (Afrique Verte).

Regarding livestock farming, pastures are still well supplied and the animals' food situation is acceptable. Watering conditions are satisfactory and the livestock's sanitary condition and physical shape are overall positive with the exception of Niger (Afrique Verte).

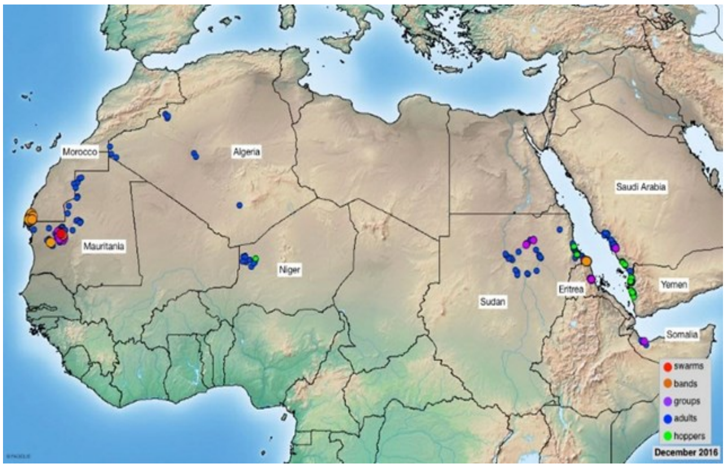
In fact, Niger recorded a forage production deficit of about 12.2 million tons of dry matter (TDM), representing approximately 48 percent of needs. Based on global needs estimates of around 25.6 million TDM, the available forage would be around 13.3 million TDM. The gap between the available forage and the actual consumption needs shows greater deficit in the regions of Diffa, Tahoua, Tillabery and Zinder. According to Nigerien authorities, the pastoral situation requires special attention this year. (OCHA)

Desert Locust as of January 3, 2017: infestations decline in Mauritania outbreaks

Desert Locust infestations declined during December in the areas affected by the recent outbreaks in Mauritania, which extended to southern Morocco due to ongoing control operations. Nevertheless, strict vigilance should be maintained as ecological conditions continue to remain favorable and another generation of breeding is likely to take place during January and February.

As temperatures increase in the coming months, hatching with the possibility of small hopper groups forming is likely in parts of northwest and northern Mauritania and adjacent areas of southern Morocco. Adult groups that are currently present will probably move back and forth between both countries. Elsewhere, low numbers of adults are present in Algeria and northern Niger.

Figure 1: Locust occurrence map



Source: FAO

Population movement's situation in the region

Gambian refugees in Senegal are starting to return back to their country

Nigerian crisis: The number of displaced people in the Lake Chad Basin is estimated at 2 195 953, or a 2 percent decrease compared to last month (UNHCR). This decrease follows the internally displaced people's (IDP) decrease in Adamawa, Bauchi, Borno, Gombe, Taraba and Yobe as shown in IOM's latest displacement tracking matrix (DTM) of December 15, 2016 where 1 770 444 IDPs were recorded. This number represents a 3 percent decrease from the previous assessment published on October 31, 2016.
The decrease reflects an ongoing trend of displaced people returning to their LGA of origin, especially in the Borno state.

The number of Nigerian refugees in the 3 neighboring countries of the Lake Chad Basin (Niger, Chad, Cameroon) slightly increased from 200 172 to 200 875 people. The increase is largely due to their arrival from Maiduguri (Nigeria) and some localities in the Extreme North, where they had previously found shelter upon their arrival in Cameroon. The main reason for their escape is insecurity, the terrorist threat, family reunification and tough living conditions in their place of origin. (UNHCR)

Population movement's situation in the region (continued)

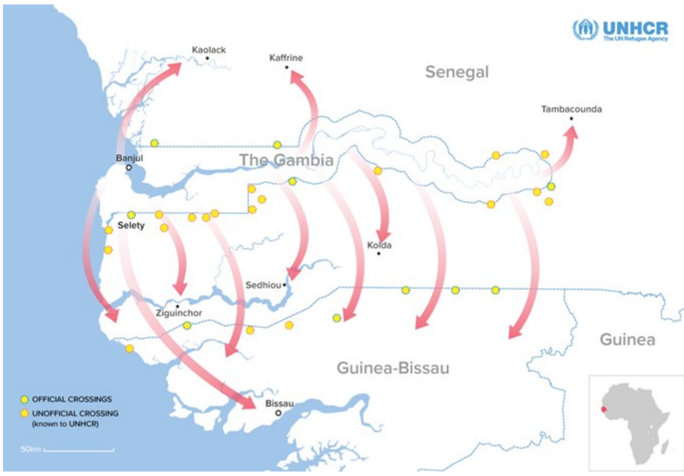
Gambian refugees in Senegal are starting to return back to their country

Malian crisis: as of December 31, 2016, the number of internally displaced people in Mali is 36 690 and the number of Malian refugees in neighboring countries is 138 811. (UNHCR)

Gambian post electoral crisis: Yaya Jammeh's withdrawal from his initial stance triggered a regional crisis that pushed more than 76 000 people to seek refuge in Senegal and 3 500 in Guinea-Bissau. There is an estimated 150 000 internally displaced people in Gambia's regions.

As of January 24, 2017, some of the populations had already started returning to Gambia, encouraged by the cool-down of tensions. However, around 50 000 people are still refugees in Senegal and Guinea-Bissau. (UNHCR)

Figure 2: Gambian population movement in neighboring countries as of January 24, 2017



Source: [UNHCR]

Trends on international markets

The FAO Food Price Index fell for the fifth consecutive year in 2016

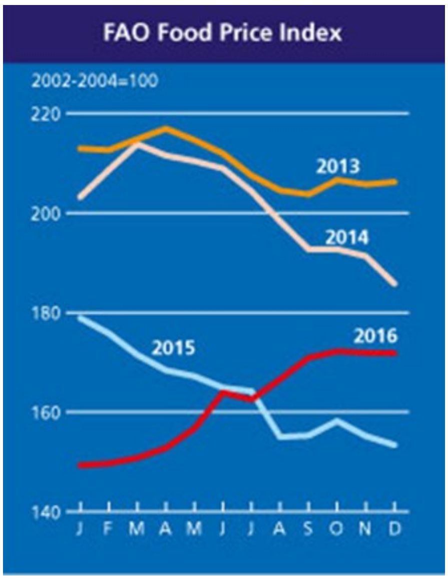
The food consumption of the majority of countries in West Africa and the Sahel depends on imports of basic products (rice and wheat in particular) whose prices are negotiated on international markets.

The FAO Food Price Index (FFPI) averaged almost 172 points in December 2016, unchanged from November with strong gains in the prices of vegetable oils and dairy largely offsetting a fall in sugar and meat quotations. For 2016 as a whole, the index averaged 161.6 points, down 1.5 percent from 2015, representing the fifth consecutive annual decline. While prices of sugar and vegetable oils rose significantly in 2016, falling prices in cereal, meat and dairy markets kept the Index below its 2015 average.

The FAO Cereal Price Index averaged 142.1 points in December, up just 0.5 percent from November and broadly stable since September. International rice prices increased somewhat in December, sustained by official measures put in place in Thailand to prop-up local prices and also strong demand for supplies from Pakistan. While maize quotations also firmed in December, mostly on weather concerns and brisk demand, wheat values weakened as a result of larger than expected production estimates in Australia, Canada and the Russian Federation as well as good crop prospects in Argentina. Overall, the Cereal Price Index averaged around 147 points in 2016, down 9.6 percent from 2015 and as much as 39 percent from its peak in 2011.

In December, the rice world prices had mixed behaviors according to their origins. In Thailand, prices were stronger due to higher activity in the external market. Meanwhile, prices in India, Pakistan and the United States remained generally stable. Vietnamese prices, on the other hand, have fallen due to scarce external sales; these would mark a 25 percent delay compared to 2015. Current Asian crop estimates start to be more accurate and indicate a global increase, especially in India and Thailand. In contrast, crop prospects in China, Vietnam and Pakistan would be lower than expected. In total, world production in 2016 should improve by 1.1 percent, after two consecutive years of low levels. The world trade should decline again because of the contraction of Asian demand. However, the outlooks for 2017 indicate an increase in world trade of around 2 percent, what may increase world prices in the coming months. [InterRice]

Figure 3: FAO food price index



Source: [FAO]

Market trends in West Africa

Harvests Continue in the Region

In December, harvesting period continues and the market situation is characterized by the seasonal increase in the overall growing supply, causing price drops and the replenishing of public, community and private stocks and the payment of loans contracted by producers during the past agricultural campaign.

Current market supplies in the Region will be able to satisfy demand thanks to incoming grains on the market place.

Overall regional cereal production is expected to be above average in 2016-2017, contributing to generally stable supply and prices. Regional production of maize and rice reached record levels. (FEWS NET, WFP, Regional Supply and Market Outlook 2016)

Nevertheless, staple food prices are expected to remain well above the average in Nigeria and Ghana (Figure 4), due to the recent depreciation of several currencies in the Region (Naira, Cedi, Leone, Guinea Franc). Despite this, imports from international markets will fill regional structural deficits of rice and wheat. International markets should remain well stocked and prices stable.

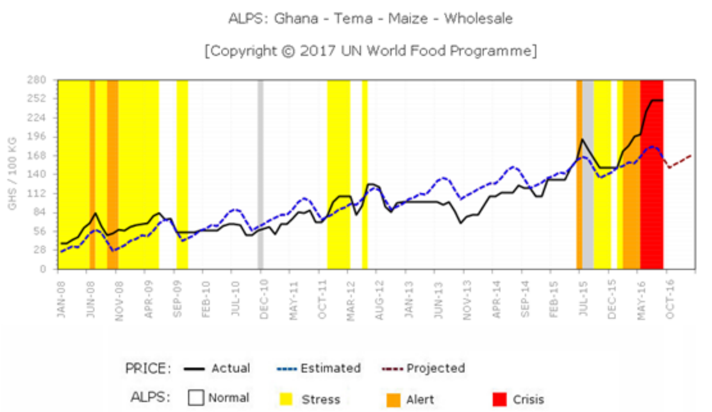
Trade with Nigeria will remain disrupted by the atypical price differentials due to the exchange rates between the Naira and the currencies of neighboring countries. Trade flows from Burkina Faso and Mali in the central basin are expected to help offset deficits in neighboring countries.

In Niger, during the month of December 2016, monitored markets are characterized by a near stability of the average prices of dry cereals, due to the improvement in the supply of products in response to a relatively stable demand. Price differentials between domestic and cross-border markets are relatively unfavorable to the supply of half of the domestic markets for basic cereals via the usual trade corridors.

Looking ahead, the price stability of the main agricultural products is expected to continue thanks to the stability of supply.

Regional institutional procurement is expected to take place at average levels. Local and regional procurement may be particularly feasible in the Central Basin, and possible in the Eastern marketing basins as well. (FEWS NET, WFP, Regional Supply and Market Outlook 2016)

Figure 4: Maize prices –Wholesale- Ghana, Tema



Source: WFP

Impact on Food Security

The food situation remains good in the region with new harvests

In September 2016, **in Guinea Bissau**, the food and nutrition situation was marked by high rates of food insecurity (30.6 percent) and acute malnutrition (10.3 percent), probably due to the seasonality, floods consequences on rice perimeters and the erosion of livelihoods due to the difficult economic context of the country.

Compared to last year, the food situation has deteriorated from 10.5 percent to 30.6 percent. The most affected regions are Cacheu (40.8 percent), Gabu (35 percent), Oio (32.2 percent), where rates exceed the overall mean (30.6 percent).

Agriculture is the main income source of rural populations, their food and nutrition situation remains linked to the agricultural and cashew nut season. Although the outlook for the 2016-2017 crop year is good and can improve household nutrition, 15 percent of households use crisis and emergency strategies. WFP Guinea Bissau, FSNMS, November 2016

At the request of the Minister of Agriculture and Rural Development, a joint mission (Government, FAO and WFP) was carried out in the northern and eastern regions of **Cameroon** in November 2016. The objective of the mission was to assess crops and food availability for the 2016—2017 crop year.

According to the administrative statistics, cereal production has seen an overall decrease in 2016 compared to last year, a decrease of about 3 percent in the Eastern Region, 5 percent in the North, 18 percent in Adamaoua and 25 percent in the Extreme-North. Insecurity negatively impacted agro-pastoral activities.

Impact on Food Security (continued)

The food situation remains good in the region with new harvests

Several kidnappings and killings in these areas have discouraged farmers using their fields, especially in Adamaoua, the North and the Extreme-North regions. In the Extreme-North region, this insecurity partially explains the decrease of about 15 percent of cereal planting area compared to the normal situation prior to the Boko Haram crisis. Government / WFP / FAO Cameroon, CFSAM, November 2016

With the aim of monitoring the food security situation of hard-to-reach populations, WFP continues to carry out telephone surveys (mVAM) in countries affected by civil insecurity:

In Nigeria, the results of the mVAM survey carried out in December 2016 among 490 traders in the Adamawa, Borno and Yobe states show an increase in the prices of imported rice, maize, millet, sorghum and vegetable oils during the last four months while the cost of labor remains unchanged. WFP Nigeria, mVAM, December 2016

In Chad, according to the results of the mVAM (1 354 households interviewed) in the Kanem, Barh El Gazal, Batha, Wadi Fira, Ouaddal, Sila and Guera regions, 37 percent of households have poor and borderline food consumption scores. The Barh El Gazal, Kanem and Wadi Fira regions have high levels of poor and borderline food consumption (46 percent, 43 percent and 42 percent, respectively).

The Coping Strategy Index (rCSI) remained stable between September 2016 and October 2016 due to the availability of new crop year products. WFP Chad, mVAM, October 2016

In Niger, in November 2016, WFP conducted an mVAM in the Diffa region (224 households interviewed). The proportion of households with poor food consumption score decreased from 4 percent in August to 1 percent in November 2016. The regularity of assistance continues to stabilize the food situation since the June 2016 attack.

From 26 percent in August, the proportion of households facing food shortage in the last 7 days decreased to 5 percent in November. WFP Niger, mVAM, December 2016

Calendars !

- → Meeting for reviewing Cadre Harmonisé handbook in Saly, Senegal from 16 to 20 January, 2017;
- → Technical Committee of the Cadre Harmonisé (CT-CH) meeting and the analysis and measurement of resilience team (AMR) in Saly, Senegal from 23 to 28 January, 2017;
- → Joint market assessment mission from January 30 to February 15, 2017;
- → CH analysis cycle – Coastal countries from February 20 to 24, 2017;
- → CH analysis cycle – Nigeria from February 27 to March 11, 2017;
- → CH analysis cycle – Sahel countries from March 6 to 11, 2017;
- → CH regional consolidation from March 15 to 21, 2017 in Saly (Senegal);
- → PREGEC from March 23 to 25, 2017 in Dakar (Senegal);
- → RPCA from April 10 to 14, 2017 in Paris (France).

@ Food Security Information in West Africa

www.wfp.org/food-security
WFP Regional Bureau Dakar
VAM Unit
rbd.vam@wfp.org

www.fao.org/emergencies/crisis/sahel/en
Mr Patrick David
patrick.david@fao.org