SAHEL AND WEST AFRICA
Food Security Outlook Update

March 2011

Ongoing fighting in neighboring countries threatens food security

Key Messages

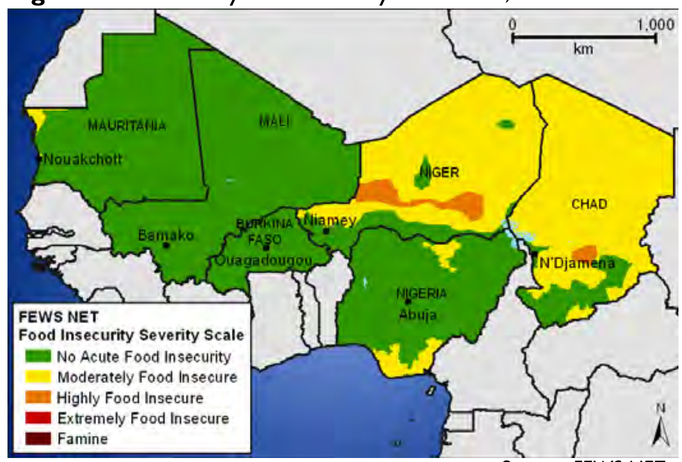
- Mali, Niger, and Chad are most likely to be impacted by the spill-over effects of the fighting in neighboring countries. The Agadez region of Niger could see an influx of some 100,000 refugees from Libya, outnumbering the local population.

- Côte d'Ivoire may well be facing a humanitarian crisis, with armed clashes spreading throughout the country and mass population displacement. More than 200,000 people have abandoned their homes, seeking refuge in schools and churches in Abidjan.

- Rising international market prices affecting the food security of poor urban and food-short households in northern Mali, Niger, Mauritania, and Chad are a continuing concern as these households become increasingly dependent on local markets between April and June.

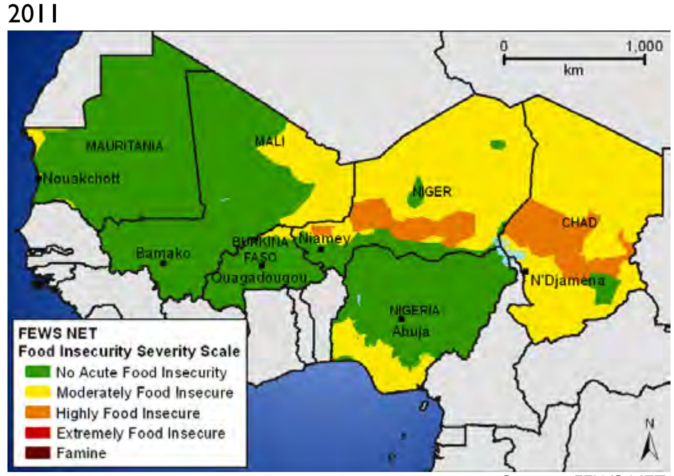
- In general, food access is expected to be better than average this year.

Figure 1. Most likely food security outcomes, March 2011



Source: *FEWS NET*

Figure 2. Most likely food security outcomes, April-June 2011



Source: *FEWS NET*

For more information on FEWS NET's Food Insecurity Severity Scale, please see: www.fews.net/FoodInsecurityScale

Update of the food security outlook through March 2011

With the month of March comes the end of off-season crops and a growing dependency by large numbers of households on local markets for their food supplies. March is also a time of transition between the end of the period of good food availability and the beginning of the lean season in bimodal areas of the Gulf of Guinea countries. Even with localized rises in prices in certain markets since November/December of last year, conditions are currently stable, with prices generally moving in line with normal seasonal trends. There is a precarious balance between supply and demand resting on the behavior of major market participants, namely on the stockpiling of crops by farmers, possible mass buying by traders, and the replenishment of national food security reserves by governments.

This report is an update of the February 2011 FEWS NET Food Security Outlook assessing food security conditions for the period from February through June 2011. The next Outlook report for the period from May through September 2011 will be released in May.

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An earlier than usual start-of-season in the Gulf of Guinea and breeding areas for desert locusts

As was the case last year, the growing season is getting off to an early start in bimodal areas, with all Gulf of Guinea countries reporting regular, relatively heavy rainfall for the second consecutive month.

In the northern part of the region, there were reports of light to moderate rainfall in the northern reaches of Mauritania towards the end of January, continuing into the first dekad of February. Weather forecasts are predicting rain in the Sahara during the week of March 6th through 13th, particularly in the border areas of Mali and Algeria. Though the risk level had reduced somewhat since February, with the rising temperatures marking the end of winter and the beginning of spring, as of March, the Food and Agriculture Organization (FAO) was still warning of a moderate risk of swarms of locusts traveling northwards towards spring pastures along the southern edge of the Atlas Mountains in Morocco and Algeria within the next month or so. However, the FAO does not find there to be any current threat to crucial crops or pastures. Monitoring activities in these areas will need to be increased.

In general, regional markets are functioning normally, but there are serious concerns over rising international market prices for food and energy

In general, grain markets are still functioning normally, untouched by the international situation. On the whole, trends in prices are predictable and in line with seasonal norms, despite a few reports of steady rises in prices in high-consumption areas of the Gulf of Guinea where price differentials are continuing to divert maize trading to these areas and away from Niger. With these few exceptions, grain prices are still generally close to seasonal averages (except in Chad, where government caps are keeping prices below-average) despite the sharp rises in prices reported this past month. As a result, food access and food security conditions are better than they were at the same time last year, particularly in the Sahel.

There is a smooth flow of rice imports and plentiful supplies in local markets in spite of the prospect of restrictions on exports by certain exporting countries. According to informants, supply should be sufficient to meet world-wide demand. The only concern is a possible reaction by governments of exporting countries, which could decide to put restrictions on rice exports at any time, as they did back in 2008.

So far, there are no visible market shocks in West Africa, aside from rises in prices for foodstuffs like oil, milk, and sugar.

Conditions in livestock markets are still good. In general, prices are high and are better than last year and better than average for this time of year. However, right now, price trends are being shaped by two situations: the fighting in Côte d'Ivoire and the restrictions in Chad. This is weakening the incomes of Chadian pastoralists while their close neighbors in eastern Niger and northeastern Nigeria are benefiting from high prices, as the restrictive measures imposed by the Chadian government continue to tighten local supplies.

In contrast, livestock prices on many markets in western Nigeria and Niger, which had been very high up until January of this year, are beginning to fall. This is a normal seasonal trend after the year-end holiday season, but is also the result of dwindling demand with the glut of animals in retail markets in southern Nigeria, where there are a number of reports of price cuts of up to 20 percent between January and February of this year.

Livestock prices will continue to fall with the lean season about to get underway in this area, which could mean lower incomes and terms of trade for pastoralists just when they need to replenish their grain reserves for their journey back to pastoral areas. Restrictions on livestock exports by the government of Chad have prevented pastoralists in that country from taking advantage of this year's good prices.

The fighting in Côte d'Ivoire and North Africa is heightening food insecurity levels in the Sahelian countries.

Trade networks have adapted to the situation in Côte d'Ivoire. Cattle exports via Ghana and imports of oil and other processed foods have picked up to some extent. However, longer travel times are increasing shipping costs and driving up retail prices.

In spite of these adjustments, there are reports of shortages of maize in Senegal and, most likely, also in the Senegal River Valley in Mauritania and western Mali, which are normally supplied with maize from southern Mali, northern Côte d'Ivoire, and Burkina Faso at this time of year.

At present, the main effect is a steady loss of migration income by households in Burkina Faso, Mali, and Niger, at a time of great need. The situation of households in northeastern Mali, northern Burkina Faso, Niger, and Chad is becoming especially tragic with the spreading social strife in Libya, which is a major destination for immigrants from these areas. Gold washing activities, which are already an integral part of household coping strategies in Mali, Burkina Faso, and Niger, are an unstable source of income, with few openings for new participants to break into this sector. The pursuit of these activities will not make up for losses of different types of migration income.

Niger may well be the hardest hit country, where the loss of migration income due to the conflict in Côte d'Ivoire is the equivalent of three to four months of food consumption. According to the International Organization for Migration (IOM), more than 100,000 migrants from sub-Saharan Africa could be traveling through Niger in the next month, en route to their respective home countries. Current estimates put the daily influx of migrants at over 2,000. The expected number of displaced persons (DPs) exceeds the size of the local population in the main receiving area of Niger (the Agadez region), whose remoteness will make it difficult to ensure that there is an adequate supply of food on hand. Unless local food reserves can be increased to cover the additional needs created by the influx of DPs, this area could be facing a serious food crisis in the days ahead.

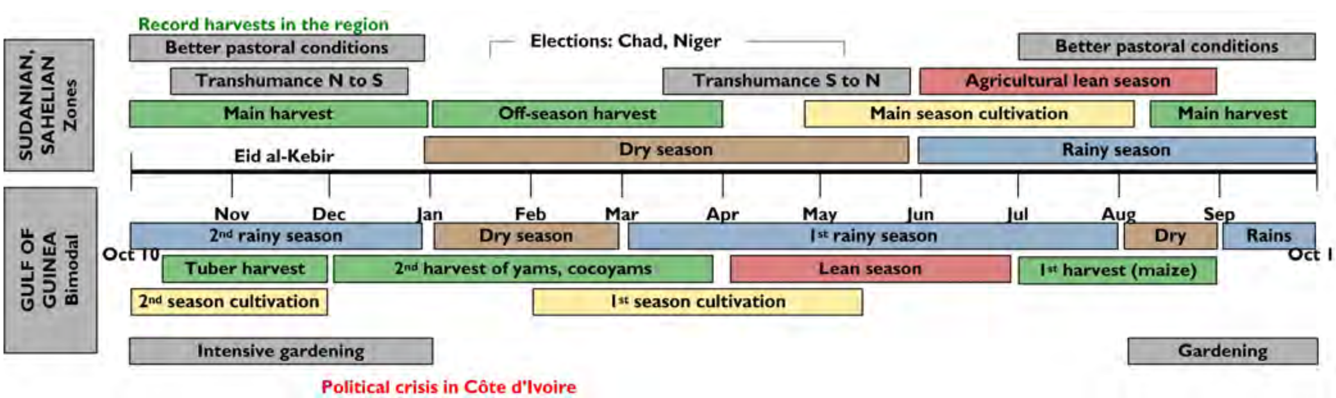
A crisis in Cote d'Ivoire, with a new outbreak of armed fighting, mass population displacement, and a quasi-suspension of payments to workers and farmers by the government and businesses

Even with shipments of supplies through Ghana and by sea slowly picking up, food availability in Abidjan is still precarious due to restrictions on circulation and racketeering by the police and militias. This is creating shortages and disproportionately steep price increases.

Moreover, the escalation in armed fighting in certain districts such as Abobo has displaced massive numbers of residents fleeing the violence, who have been forced to seek refuge in schools and churches without any independent means of survival. More than 200,000 people, mostly women and children, are in this predicament, surviving on charity, which will not suffice to meet their needs without aid from the international community.

The situation is further complicated by the breakdown of the banking system, which is limiting the flow of international imports. Households in virtually all parts of the country are also running out of income and finding it increasingly difficult to maintain regular food access with each passing day. If things continue as they are, a humanitarian crisis in Côte d'Ivoire is a real possibility in a matter of days.

Seasonal calendar and critical events timeline



Source: *FEWS NET*