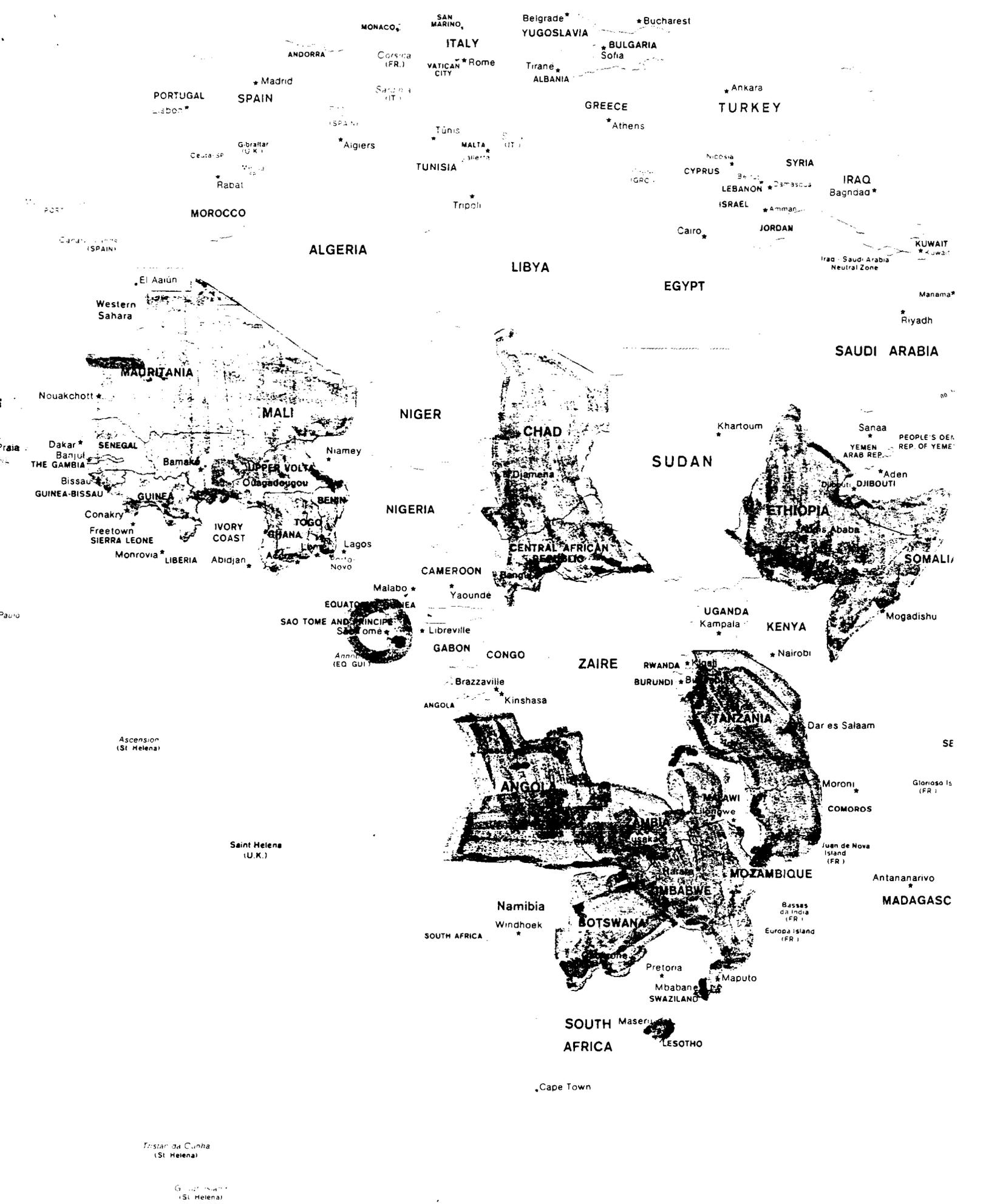


AFRICA'S FOOD CRISIS--1984  
THE CURRENT SITUATION AND OUTLOOK

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CONTRACT  
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This report treats the following 24 countries:

Angola  
Benin  
Botswana  
Cape Verde  
Central African Republic  
Chad  
Ethiopia  
Gambia  
Ghana  
Guinea  
Guinea-Bissau  
Lesotho  
Mali  
Mauritania  
Mozambique  
São Tome and Principe  
Senegal  
Somalia  
Swaziland  
Tanzania  
Togo  
Upper Volta  
Zambia  
Zimbabwe

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Though the above persons all made significant contributions to this report, responsibility for errors or omissions rests with the author.

## AFRICA'S FOOD CRISIS--1984

This brief report represents the most up-to-date effort to report in comprehensive fashion on Africa's growing food crisis. It concentrates on the twenty-four countries declared by the UN/Food and Agriculture Organization (FAO) to be "affected by Food and Agriculture Emergencies in 1984." This summary report has as its chief sources the Foreign Agriculture Service and the Economic Research Service at U.S.D.A., the Africa Bureau and field missions at USAID, and the Office of Global Information and Early Warning System at the UN/FAO in Rome.

The format is as follows: first, the summary Tables 1-5 are presented with alternative estimates for remaining food aid needs; second, the situations found in the 24 countries are discussed in detail in two pages. The first page presents numerical data for each nation's production, consumption, imports, food aid, and remaining needs. The second page highlights nutrition problem areas, numbers of affected persons, the causes of the present food shortfall, and the country's program for agricultural development. Its format is such that it can be updated and changed easily as new information becomes available.

Reports have been reaching Washington for several months from our own missions and embassies--as well as from missionaries, private voluntary organizations, members of Congress, international organizations, and the press--that Africa is undergoing the worst drought since 1973. It is not limited to the Sahel this time, but includes countries in central, eastern, and southern Africa too. This food crisis is not limited to one region or one cause. The principal reason behind it is the weather pattern disruption associated with El Niño this past year, which affected harvests on every continent. Tropical storms, widespread brush fires, low water tables, insect pests, animal diseases, a cyclone and an earthquake, and little or no rainfall at crucial times in the crop cycle--all of these have contributed this year to making a genuine emergency out of the present state of African agriculture.

### Notes on Sources

The data contained in this report are taken primarily from three sources:

The Food and Agriculture Organization of the United Nations;  
The Africa Bureau of the United States Agency for International  
Development; and  
The Economic Research Service of the United States Department of  
Agriculture.

Since 1983, the FAO and the World Food Programme (WFP) have constituted a special Joint Task Force to monitor developments in Africa in the domain of world food security. This functions under the aegis of the Office of the Global Information and Early Warning System on Food and Agriculture. The latest report of this Special Task Force, "Situation Report No. 3," forms the basis for the data in the column labeled "FAO" on page one of the country sheets. This is document ESC/OSRO/AFR.84/1, dated 9 January 1984.

In the column labeled "USAID" on page one of the country data sheets is contained information gleaned from the recent cable traffic, USAID missions in many countries, and the responsible desk officers here in Washington. For figures on P.L.480 Title II food aid requested and approved, the source is USAID's Office of Food-for-Peace. Title I and Title III data come from the latest list at the Foreign Agricultural Service of USDA.

The experts at the Economic Research Service (ERS) at the USDA provided the information labeled in the "USDA" column on page one of the country sheets. Almost all of it comes from a printout updated through January 26, 1984. In a few cases--Central African Republic, Mali, and São Tome and Principe, the data come from the 1983 report on "World Food Aid Needs and Availabilities" published by the ERS. Data on page two related to IMF loans or arrangements come from the January 1984 issue of "International Financial Statistics" (Volume XXXVII #1) and are in SDRs (Special Drawing Rights) and dollars.

Where figures diverge widely between sources, differences usually stem from different estimates of one variable. Overall production estimates, for instance, do not vary significantly from source to source. Nor do estimates of total grains requirements usually vary greatly. The differences sometimes are major, however, as concern estimates of anticipated commercial imports. FAO takes 1982/83 imports and assumes that 1983/84 imports will be the same. (This may or may not be the case, depending on the availability of foreign exchange, concessionality of terms on food-financing loans offered, the level of loans and grants in the aggregate this year, etc.) USDA, on the other hand, uses reports of Agriculture Attachés of the FAS, a wide variety of trade journals and local publications in order to arrive at its estimate, which is called "food import capacity." This is the greatest estimated amount that a nation could import, given its present resources.

Relatively small differences in baseline data (such as estimates of population and per capita consumption) sometimes skew food needs and availabilities sharply one way or another. Furthermore, it is difficult if not impossible to get accurate information concerning on-farm, government, and private grain stocks. The lack of stock information may be the chief weakness of this report. On the other hand, the actual food situation on the ground in several countries is so bad that stocks have definitely been driven down to zero or to near zero by the force of daily consumption.

It is not surprising that there are differences in the estimates of several variables by the FAO, the USAID, and the USDA. What is remarkable is that despite all these differences, the "bottom-line" estimates of remaining need converge so closely. This is indicated in Tables 1 through 5.

### Considerations of Methodology

The principal goals of this paper are two: to arrive at an accurate estimate of the amount of food aid cereals needed in 1984 by the 24 countries in question, and to provide concise information on the actual situation on the ground in terms of the present food and agriculture situation for the use of policymakers. In general, exercises of this sort are colored by the sources of information and influenced by a variety of factors. The data presented derive from a number of reliable sources, including USAID mission directors, U.S. Embassy officials, and resident FAO and WFP officials. Members of Congress and the press have provided other accounts that do not greatly diverge. It is readily agreeable, for instance, that the drought in the Senegal River Valley has severely affected crop and meat production both in northern Senegal and in southern Mauritania. This is true even when different sources may differ on the magnitude of the effects.

Unfortunately, one does not have the same leeway when dealing with sets of figures. Everyone who has been in the field in Africa is aware of the constraints under which information must be gathered. So it is not surprising that different sources may report numbers that vary widely for national production, macroconsumption needs, projections of the food deficit, etc. Some portion of these differences stems from the different sources that are used as the basis for the estimates and "guesstimates" herein contained. But other differences arise from the way in which available data are interpreted. Expert economists can reasonably differ over the meaning and accuracy of a single number or set of numbers, and all will have a part of the truth.

This summary paper reports three sets of figures for the 24 "food crisis" countries, which have their origins in the FAO, the USAID, and the USDA. In many cases, there are variances, even significant variances, between the figures given. It is difficult to judge from Washington the validity of each of the sets of numbers given. What can be said with accuracy is that these figures represent the best information available at this time. [Of that there is no question.] There is obviously a continuing need to revise these tables as new information becomes available from these three sources and others. Meanwhile, this report might be termed, for a few weeks anyway, the most serious attempt at accuracy that has been undertaken and which draws from the greatest possible range of sources.

An attempt has been made to standardize the terms of reporting here which may be confusing initially. In interpreting the country-by-country figures in this report, it may be useful to keep in mind the following considerations.

All three sources of data use a common method of calculation for the top half of the tables, that is "total grain requirement" minus "total grain production" minus "stocks" minus "anticipated commercial imports" equals the "food aid need" or what might be called a raw deficit. This is item 4-(1 + 5 + 6). In the case of the FAO figures, "P.L.480 non-emergency" and "other donors" are not deducted from the deficit above line 9, but below that. Thus, the deficit figure listed by the FAO is usually larger than the deficit listed by the other

two sources, because USAID and USDA have an interim step called "food aid need" and first deduct known food aid from that figure before establishing a deficit. In other words, the bottom line is arrived at by a similar process but in a different order. This stems from differences in terminology among the reporting organizations.

USDA reports as "food aid need" that portion of the total grains requirement which remains unmet after production, stocks, and anticipated or actual commercial imports are deducted. USDA sources did not supply information on food aid in the pipeline; that information has been supplied below the line of "food aid need" from other sources. The Food-for-Peace Bureau at USAID supplied the correct information on U.S. Title II pledges and commitments, for instance. For the pledges of "other donors," information from the FAO was used. Accordingly, figures of "food aid need" on the USDA column come from the USDA/ERS, while the numbers "below the line" are from sources other than the USDA. The USDA column, in other words, attempts to build on the traditional accuracy of ERS data and to use it as a base from which to make extrapolations by adding other figures known to be accurate.

In all cases, however, the remaining need (line 13) is the result of "total grain requirements" minus "total grain production" minus "stocks" minus "anticipated commercial imports" minus non-emergency food aid and emergency food aid from all sources. (This is 4-[1 + 5 + 6 + 7 + 8 + 11 + 12] equals 13.) Despite differing interim sub-totals, the author has attempted to minimize differences arising from the different methodologies used by the reporting organizations.

#### Notes on Tables

Table 1 shows the remaining tonnage that must be imported to satisfy the "total grains requirement" (item 4 on the country sheets). According to the FAO figures, two countries have no "remaining need": Swaziland and Lesotho. The remaining needs of Angola (3), Central African Republic (3.9), and Sao Tome and Principe (3.1) are quite low. The remaining needs of four countries-- Ethiopia (215.6), Senegal (273), Somalia (206.3), and Ghana (204) account for over half (55%) of the total remaining needs. Other major shortfalls projected by FAO include Mozambique (160) and Mali (122).

In the USAID column, sixteen country missions reported enough figures to make possible a determination of remaining need. Most of the rest (eight countries) have no USAID mission. Angola has no U.S. Embassy or USAID mission. Four of the reporting missions had projections of gain surpluses this year. These were Botswana (30.7), Chad (2.3), Lesotho (22.8), and Swaziland (40). These figures are not included in the totals on the following tables because they are both theoretical and non-transferable. That is to say that if Chad does accrue a surplus this year of the projected 2300 MT, it is safe to say that it will not be transferred or exported. USAID's highest projected remaining need figures are for Upper Volta (133.2) and Mauritania (112.2), but

large remaining need figures are expected in Mozambique and Somalia as well. USAID had no official estimates yet for these two countries at the time this report was drafted .

USDA's figures indicate a surplus in Cape Verde (derived from large aid pledges) and small deficits in Central African Republic (7), Guinea (1.9), and São Tome and Príncipe (3.1). (This last figure comes from FAO, as USDA generally uses FAO estimates for São Tome.) Significant remaining needs are projected by USDA for Ethiopia (186.9), Mozambique (177.4), Senegal (160.1), and Somalia (146.1).

There are seemingly large differences between the USDA figures and the FAO figures in the case of individual countries, but the aggregate projected remaining needs show a difference of just 72.4 (1692.4 minus 1557 = 72.4). Thus, USDA's aggregate estimate is just 4.4% lower than that of the FAO. This is certainly an acceptable margin of difference given the inexact nature of the situation in 24 countries.

Because there were no official U.S.A.I.D./U.S. Embassy estimates in 8 cases, Tables 2, 3, 4, and 5 contain various alternative scenarios for arriving at a "U.S.A.I.D. estimate." (It is assumed that as new and better information becomes available through U.S. channels, the information will be plugged into the gaps and will thereby obviate the need for alternative projections.) Table 2 shows the result (1229.8) when USDA figures are used in lieu of missing U.S.A.I.D. figures in the eight cases. This table probably represents the closest estimate to the truth contained in this study. Table 3 shows the remaining need (1161.7) when FAO figures are plugged into the eight gaps. This is a surprising 68.1 below the joint USAID/USDA estimate, or 5.5%. Table 4 represents the use in eight cases of the lower of the two estimates available--either USDA or FAO. As such, it is indicative of the lowest possible remaining need (1037.4) and it is impossible logically to demonstrate a lower need with available information. Table 5, on the other hand, uses the higher estimate of FAO or of USDA in the eight cases. The result (1354.1) probably signifies the highest remaining need estimate using available information, a level beyond which it is impossible to argue.

FY 84 P.L. 480 Title I/III Commodity Allocations\*

	<u>Value</u> \$ <u>Million</u>	<u>Wheat</u>	<u>Rice</u> <u>000 MT</u>	<u>Sorghum</u>	<u>Total</u>
Guinea	2		6		6
Senegal	8	6	20		26
Somalia	11.5	27	18		45
Tanzania	3		4	11	15
Zambia	4	17	6		23
	<u>28.5</u>	<u>50</u>	<u>54</u>	<u>11</u>	<u>115</u>

This chart covers only countries included in this study, i.e. the FAO list of 24 food emergency countries. Other Sub Saharan African countries are receiving 473,000 MT valued at \$96.5 million under Title I this year.

\*Source: Foreign Agricultural Service, USDA (grains only) [chart does not include 6000 MT vegoil for Somalia valued at \$4.5 million or 4000 MT vegoil for Zambia valued at \$3 million.]

IMF Accounts: Position to Date\* (figures in millions)

LENDING COMMITMENTS

	<u>STANDBY ARRANGMENTS</u>		<u>UNDRAWN BALANCE</u>	
	<u>DRAWN</u>			
	<u>SDR</u>	<u>US\$</u>	<u>SDR</u>	<u>US\$</u>
C.A.R.	4.5	4.6548	13.5	13.9644
Ghana	95.4	98.68176	143.1	148.02264
Senegal	15.8	16.34352	47.3	48.92712
Somalia	60.0	62.064	-	-
Togo	13.6	14.06784	7.8	8.06832
Zambia	76.5	79.1316	135.0	139.644
Zimbabwe	97.5	100.854	202.5	209.466
	<u>363.3</u>	<u>375.79752</u>	<u>549.2</u>	<u>568.09248</u>

The other 17 countries in this study have not made standby arrangements with the IMF.

(rate = SDR 1 = US\$ 1.0344)

\*Source: International Financial Statistics Jan. 1984

1

(000 metric tons)

Table 1 REMAINING NEED

(after commercial purchases and food aid from all sources)

	<u>FAO</u>	<u>USAID</u>	<u>USDA</u>
Angola	3		54
Benin	10.8		65.1
Botswana	27.6	30.7 (S)	16.1
Cape Verde	26.4	29.3	10.8 (S)
C.A.R.	3.9		7
Chad	52	2.3 (S)	65.7
Ethiopia	215.6	36.7	186.9
Gambia	11	15.9	24.9
Ghana	204	78.6	78.6
Guinea	27		1.9
G. Bissau	28	37	41.8
Lesotho	0	22.8 (S)	83.2
Mali	122	51	56.4
Mauritania	54	112.2	16.5
Mozambique	160		177.4
Sao Tome	3.1	7.1	3.1
Senegal	273	74.9	160.1
Somalia	206.3		146.1
Swaziland	0	40 (S)	41.1
Tanzania	9.1	8.3	32.9
Togo	21		87.6
Upper Volta	55	133.2	96.2
Zambia	93		54
Zimbabwe	23.6	52.5	60.4
	<hr/>	<hr/>	<hr/>
	1629.4		1557

(S) Indicates projected surplus

8

(000 metric tons)

Table 2 REMAINING NEED (with USDA)

(after commercial purchases and food aid from all sources)

	<u>FAO</u>	<u>USAID</u> (with USDA)	<u>USDA</u>
Angola	3	54 *	54
Benin	10.8	65.1 *	65.1
Botswana	27.6	30.7 (S)	16.1
Cape Verde	26.4	29.3	10.8 (S)
C.A.R.	3.9	7 *	7
Chad	52	2.3 (S)	65.7
Ethiopia	215.6	36.7	186.9
Gambia	11	15.9	24.9
Ghana	204	78.6	78.6
Guinea	27	1.9 *	1.9
G. Bissau	28	37	41.8
Lesotho	0	22.8 (S)	83.2
Mali	122	51	56.4
Mauritania	54	112.2	16.5
Mozambique	160	177.4 *	177.4
Sao Tome	3.1	7.1	3.1
Senegal	273	74.9	160.1
Somalia	206.3	146.1 *	146.1
Swaziland	0	40 (S)	41.1
Tanzania	9.1	8.3	32.9
Togo	21	87.6 *	87.6
Upper Volta	55	133.2	96.2
Zambia	93	54 *	54
Zimbabwe	23.6	52.5	60.4
	<hr/> 1629.4	<hr/> 1229.8	<hr/> 1557

(S) Indicates projected surplus and is not included in the totals which are deficits.

\* Indicates figure taken from USDA/ERS projections.

9

(000 metric tons)

Table 3 REMAINING NEED (with FAO)

(after commercial purchases and food aid from all sources)

	<u>FAO</u>	<u>USAID</u> (with FAO)	<u>USDA</u>
Angola	3	3 *	54
Benin	10.8	10.8 *	65.1
Botswana	27.6	30.7 (S)	16.1
Cape Verde	26.4	29.3	10.8 (S)
C.A.R.	3.9	3.9 *	7
Chad	52	2.3 (S)	65.7
Ethiopia	215.6	36.7	186.9
Gambia	11	15.9	24.9
Ghana	204	78.6	78.6
Guinea	27	27 *	1.9
G. Bissau	28	37	41.8
Lesotho	0	22.8 (S)	83.2
Mali	122	51	56.4
Mauritania	54	112.2	16.5
Mozambique	160	160. *	177.4
Sao Tome	3.1	7.1	3.1
Senegal	273	74.9	160.1
Somalia	206.3	206.3 *	146.1
Swaziland	0	40 (S)	41.1
Tanzania	9.1	8.3	32.9
Togo	21	21 *	87.6
Upper Volta	55	133.2	96.2
Zambia	93	93 *	54
Zimbabwe	23.6	52.5	60.4
	<hr/>	<hr/>	<hr/>
	1629.4	1161.7	1557

(S) Indicates projected surplus and is not included in the totals which are deficits.

\* Indicates figure taken from FAO projections.

(000 metric tons)

Table 4 REMAINING NEED (with lower projection)  
(after commercial purchases and food aid from all sources)

	<u>FAO</u>	<u>USAID</u> (with lower projection)	<u>USDA</u>
Angola	3	3 *	54
Benin	10.8	10.8 *	65.1
Botswana	27.6	30.7 (S)	16.1
Cape Verde	26.4	29.3	10.8 (S)
C.A.R.	3.9	3.9 *	7
Chad	52	2.3 (S)	65.7
Ethiopia	215.6	36.7	186.9
Gambia	11	15.9	24.9
Ghana	204	78.6	78.6
Guinea	27	1.9 *	1.9
G. Bissau	28	37	41.8
Lesotho	0	22.8 (S)	83.2
Mali	122	51	56.4
Mauritania	54	112.2	16.5
Mozambique	160	160 *	177.4
Sao Tome	3.1	7.1	3.1
Senegal	273	74.9	160.1
Somalia	206.3	146.1 *	146.1
Swaziland	0	40 (S)	41.1
Tanzania	9.1	8.3	32.9
Togo	21	21 *	87.6
Upper Volta	55	133.2	96.2
Zambia	93	54 *	54
Zimbabwe	23.6	52.5	60.4
	<hr/>	<hr/>	<hr/>
	1629.4	1037.4	1557

(S) Indicates projected surplus and is not included in the totals which are deficits.

\* Indicates the use of the lower figure from USDA/ERS or FAO.

11

(000 metric tons)

Table 5 REMAINING NEED (with higher projection)  
(after commercial purchases and food aid from all sources)

	<u>FAO</u>	<u>USAID</u> (with higher projection)	<u>USDA</u>
Angola	3	54 *	54
Benin	10.8	65.1 *	65.1
Botswana	27.6	30.7 (S)	16.1
Cape Verde	26.4	29.3	10.8 (S)
C.A.R.	3.9	7 *	7
Chad	52	2.3 (S)	65.7
Ethiopia	215.6	36.7	186.9
Gambia	11	15.9	24.9
Ghana	204	78.6	78.6
Guinea	27	27 *	1.9
G. Bissau	28	37	41.8
Lesotho	0	22.8 (S)	83.2
Mali	122	51	56.4
Mauritania	54	112.2	16.5
Mozambique	160	177.4 *	177.4
Sao Tome	3.1	7.1	3.1
Senegal	273	74.9	160.1
Somalia	206.3	206.3 *	146.1
Swaziland	0	40 (S)	41.1
Tanzania	9.1	8.3	32.9
Togo	21	87.6 *	87.6
Upper Volta	55	133.2	96.2
Zambia	93	93 *	54
Zimbabwe	23.6	52.5	60.4
	<hr/> 1629.4	<hr/> 1354.1	<hr/> 1557

(S) Indicates projected surplus and is not included in the totals which are deficits.

\* Indicates the use of the higher figure from USDA/ERS or FAO.

12