WEST AFRICA Food Security Outlook October 2013 through March 2014

Food insecurity in the Sahel is on the decline, but could escalate starting in January

KEY MESSAGES

- In general, harvests across the region will be average to good. With these ongoing harvests, most households have an adequate diet and are able to meet their nonfood needs with income from the sale of cash crops and wage labor. Most areas of the region are currently experiencing Minimal (IPC Phase 1) food insecurity.

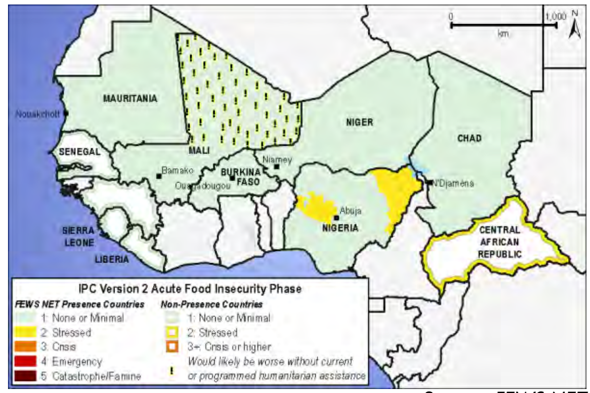
- However, there are localized pockets of severe production shortfalls in the Sahel due to the individual or combined effects of a late start of the rains, mid-season dry spells, and an earlier than usual end to the rainy season. Household food stocks in deficit areas of Niger and Chad will depleted earlier than usual and widespread Stressed (IPC Phase 2) food security outcomes are likely by January 2014.

- The situation in northeastern Nigeria will continue to be a source of concern with the escalation in Boko Haram-related fighting. The conflict has disrupted livelihoods and crop production in this area, as well as trade flows, particularly for livestock, between Nigeria, southeastern Niger, and west-central Chad. With below-average food stocks and reduced incomes, poor households in northeastern Nigeria will face food consumption gaps and will experience Crisis (IPC Phase 3) levels of food insecurity starting in January 2014.

- Northern and central regions of the Central African Republic are reeling from the combined effects of the politico-military crisis and disruptions to the growing season. This will limit food availability and make it difficult for very poor and poor households to maintain their food access. Thus, households in these areas will face Stressed (IPC Phase 2) food security outcomes through at least March 2014.

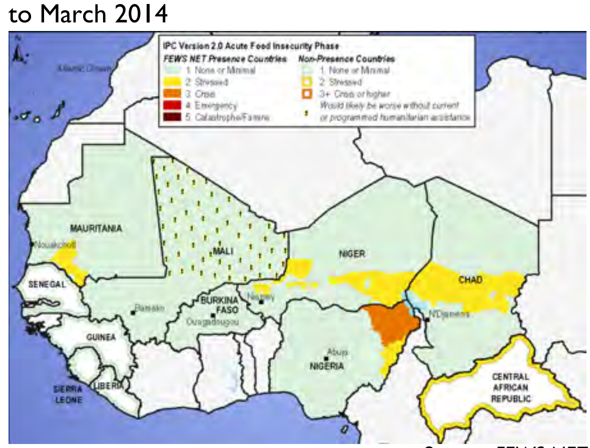
- In Mali, trade flows to northern markets of cereals from southern Mali and of imported foodstuffs from Algeria should be regular and at above-average levels. These flows will be sufficient to cover expected production shortfalls in the Gao and Timbuktu regions. In addition, improving incomes from livestock sales and continuing humanitarian assistance programs should help maintain food insecurity at Minimal (IPC Phase 1) levels between now and March 2014.

Figure 1. Projected food security outcomes, October to December 2013



Source: *FEWS NET*

Figure 2. Projected food security outcomes, January to March 2014



Source: *FEWS NET*

These maps show relevant acute food insecurity outcomes for emergency decision-making. They do not necessarily reflect chronic food insecurity.

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OUTLOOK BY COUNTRY

Burkina Faso

- In general, cereal harvests for the 2013/14 growing season are above-average, with localized production shortfalls in the Sahelian region due to the late start-of-season in that area. Pastoral conditions are also still reasonably good, though green pasture in livestock-rearing areas is rapidly drying up due to an earlier than usual end of the rainy season.

- Better-off households and traders have unusually large carry-over stocks due to a good 2012/13 harvest. Favorable crop production forecasts are helping to stabilize market prices for staple foods at levels near the seasonal average. These prices, as well as above-average wages from farm labor and cash crop sales, are enabling poor households to build up their cereal stocks, as well as meet their nonfood needs.

- The Minimal (IPC Phase 1) levels of acute food insecurity currently observed across the country are expected to continue through March 2014.

To learn more, see the complete October 2013 through March 2014 Food Security Outlook for Burkina Faso.

Mali

- In general, harvests for the 2013/14 growing season in major crop-producing areas of the country are average, with localized pockets of below-average harvests (in Mopti, Koulikoro, Ségou, and Kayes) after an extended dry spell in September. Pasture in northern areas is in average to above-average condition.

- Better-off households and traders in crop-producing areas in the southern and central parts of the country have large carry-over inventories. These inventories will help improve market supplies and stabilize, if not bring down, cereal prices in the next couple of months following the harvests. September prices for staple food crops (millet, sorghum, and rice) are down from the same time last year but remain above the five-year average.

- Northern markets have been fairly active since the deployment of local and MINUSMA forces in July 2013. Staple food prices (millet, sorghum, and rice) are down from the same time last year, with seasonal declines in prices since October ranging from five to 20 percent. In a departure from the norm, livestock prices are above-average, which is improving livestock-to-cereal terms of trade for pastoralists. With the restoration of peace, the gradual revival of economic activities (ex. commercial activities), and ongoing humanitarian assistance programs, poor households should see an improvement in their access to income and food.

- The Minimal (IPC Phase 1) levels of food insecurity currently observed in the southern and central areas of the country will remain unchanged through at least March. Moreover, improving incomes for poor households from livestock sales and wage labor and expected humanitarian assistance will help maintain food insecurity in northern regions at Minimal (IPC Phase 1) levels through March 2014.

To learn more, see the complete October 2013 through March 2014 Food Security Outlook for Mali.

Mauritania

- Cereal harvests for the 2013/14 growing season will be above-average, with scattered pockets of production shortfalls in Guidimakha. Harvests of flood-recession crops between January and March of next year will also be above-average as an adequate supply of seeds has enabled households to plant a larger area of land in crops this year. Thus, crop sales and farm labor should generate normal levels of income for poor households.

- Conditions in pastoral areas are generally good. However, locally poor conditions (in Guidimaka, Brakna, etc.) will trigger earlier than usual transhumant movements, in February/March instead of in April/May as is a normal year, which will reduce the livestock-related wage incomes of poor households in affected areas.

- Cereal prices have been relatively stable since last month but are still above the five-year average (by 20 to 40 percent) due to above-average prices on source markets in Mali. These high price levels could threaten food access for poor households in certain areas, such as Guidimaka and Brakna, where households have faced a reduction in incomes from farm labor activities.

- In most areas, normal farm incomes are providing poor households with adequate access to food and income, maintaining them at Minimal (IPC Phase 1) levels through at least the end of December. However, there will be an escalation in food insecurity in the Guidimaka and Brakna regions starting in January 2014, producing Stressed (IPC Phase 2) food security outcomes.

To learn more, see the complete October 2013 through March 2014 Food Security Outlook for Mauritania.

Niger

- According to the Bureau of Agricultural Statistics, the overall cereal production shortfall for the 2013/14 growing season is estimated at 319,000 metric tons, with Tillabéry and Diffa regions worst affected. The main contributing factors to these production shortfalls are a late start-of-season and an earlier than usual end of the rains in September.

- In general, conditions in pastoral areas are average. Pasture is in poor to average condition (poor in the southeast and average in south-central areas). However, poor households in pastoral areas will earn normal incomes from livestock-related wage labor, as transhumance movements in December/January are expected to be normal, and from milk sales due to average milk production levels.

- Cereal prices remain above the five-year average (by 30 to 50 percent) despite a seasonal decline in prices since the first millet harvests at the end of September. Prices for livestock, particularly for small ruminants, are up from last month and are above the five-year average (by 33 and 29 percent, respectively) on all livestock markets due to sustained demand from Nigeria and urban areas, and due to the celebration of Tabaski. This should help improve food access for poor households, particularly for pastoral households who primarily rely on market purchases to meet their food needs. Favorable terms of trade for these households should enable them to replenish their food stocks.

- With the seasonal improvement in household food stocks, all areas of the country should continue to experience Minimal (IPC Phase 1) food insecurity through the end of December, despite the reported crop production shortfalls. However, conditions could rapidly deteriorate, producing Stressed (IPC Phase 2) food security outcomes starting in January 2014 in certain parts of the country (Diffa, Tillabéry, Tahoua, and Zinder), when household food stocks prematurely deplete and already above-average prices start rising again.

To learn more, see the complete October 2013 through March 2014 Food Security Outlook for Niger.

Nigeria

- Most areas of the country are expecting good harvests with the exception of conflict areas (Borno, Adamawa, and Yobe), where local households have left their homes and have abandoned their normal agricultural activities.

- Prices for major cereal crops (millet, sorghum, and maize) on all domestic markets have been in decline since September, but are still well above the five-year average. This is currently working to the advantage of poor households who are selling part of their crop production to raise capital for their usual petty trade activities. As a result, their incomes should remain well above-average through January 2014. However, these households will become highly market-dependent starting in January once their food stocks have depleted. At that time, they could face a decline in their purchasing power when they are net purchasers on local markets.

- Food security outcomes remain Stressed (IPC Phase 2) in the west-central part of the country, where local livelihoods have been disrupted by delays in harvesting activities caused by a late start-of-season and the continuing effects of last year's floods. However, widespread harvests of sorghum, rice, and cowpeas will bring food insecurity down to Minimal (IPC Phase 1) levels by January 2014.

- Stressed (IPC Phase 2) food security outcomes are also persisting in northeastern Nigeria due to the effects of ongoing, Boko Haram conflict on local food and income sources. This conflict will continue to disrupt household livelihoods, local crop production, and trade with Niger, other parts of Nigeria, and Chad during the course of next year. Moreover, already high cereal prices will continue to rise to above-average levels, reducing market access for poor households who have lost their main sources of food (rainfed and flood-recession agricultural activities) and income (trade). Starting in January, food security outcomes will escalate to Crisis (IPC Phase 3) levels.

To learn more, see the complete October 2013 through March 2014 Food Security Outlook for Nigeria.

Chad

- Crop production forecasts are predicting average to above-average harvests in the country's Sudanian zone. On the other hand, they are predicting below-average harvests in localized areas of the Sahel based on the late start of the growing season, mid-season droughts, and the earlier than usual end to the rainy season. Despite the localized crop production shortfalls, household food stocks are being replenished with the ongoing harvests, even those of poor households, which will enable them to meet their needs at least through the end of December. Thus, all areas of the country will experience Minimal (IPC Phase 1) food insecurity between October and December 2013.

- Market supplies are currently more than adequate. In addition, fresh crops from ongoing harvests, as well as carry-over inventories from last year, are stabilizing prices for staple food crops (millet, rice, and sorghum). October prices were generally above-average, although normal household incomes from wage labor, particularly agricultural work, are enabling poor households to still access cereals.

- Conditions in pastoral areas are still favorable as pastures remain lush, though pasture availability is somewhat below-average for this time of the year. The slowdown in exports with the end of Tabaski has driven down livestock prices since September, although prices are still up from the same time last year. For example, sheep prices on the Mao market are 23 percent above last year' levels. These lucrative livestock prices continue to provide poor pastoral households with enough income to purchase cereals on local markets.

- Households in Wadi-Fira, parts of northern Ouara, Kanem, Hadjer Lamis, northern Batha, and Bahr El-Ghazel will begin to deplete their cereal stocks in January (one to two months earlier than normal). Between January and March, they will then be more dependent on market purchases and will face abnormally high prices. Food consumption by these households will be reduced and minimally adequate during this period, producing Stressed (IPC Phase 2) food security outcomes.

To learn more, see the complete October 2013 through March 2014 Food Security Outlook for Chad.

Remote monitoring countries[1]

Central African Republic

- In the south and west, harvests of maize and groundnuts have been ongoing since August and will continue through January for rainfed rice and millet crops. These harvests have improved the food security situation compared with conditions at the height of the lean season in August. Households in these areas are currently able to meet their food needs and will experience Minimal (IPC Phase 1) food insecurity between now and March 2014.

- The civil insecurity in northern and central areas of the country continues to limit normal access to income-generating activities, as well as local households' access to their fields, disrupting farming activities. As a result, food access remains limited and local households will continue to face Stressed (IPC Phase 2) food security outcomes through March 2014.

[1] In remote monitoring, the analyst is generally based at the nearest regional office, relying on a network of partners for data. Reports on remote monitoring countries may be less detailed than those for the above-mentioned countries, where FEWS NET maintains a local office.

To learn more, see the complete October 2013 Remote Monitoring Update for the Central African Republic.

Guinea

- Due to the good spatial and temporal distribution of rainfall through the end of September, crops are in advanced stages of development, with harvesting activities for maize, sorghum, pulses, and lowland rice starting on time in certain areas.

- Harvests of cereals and other crops are expected to be generally above-average throughout the country. This, along with stable food prices and normal livelihoods, will drive Minimal (IPC Phase 1) levels of acute food insecurity through March 2014.

- Possible political demonstrations in the wake of the parliamentary elections held in early October could lead to temporary, localized shutdowns of markets and other public services. However, this should not significantly affect market supplies or food prices, and households should continue to have regular food access.

To learn more, see the complete October 2013 Remote Monitoring Update for Guinea.

Liberia

- Preliminary production estimates by the joint CILSS-FEWS NET-FAO-WFP-Government mission indicate that 2013 rice production declined 20 percent compared to last year while cassava production increased 1.5 percent.

- Despite a decline in rice production during the main season, the majority of households will continue to face Minimal (IPC Phase 1) acute food insecurity through at least March 2014 thanks to an upcoming off-season rice harvest, good market supply of imported rice, and normal income levels.

To learn more, see the complete October 2013 Remote Monitoring Update for Liberia.

Senegal

- The continuation of rainfall over the first ten days of October allowed late-planted crops to fully mature. However, earlier delays in agricultural activities caused a reduction in the land area planted this year, as well as crop yields. In general, harvests are expected to be below-average.

- October prices for locally grown cereal crops (millet, sorghum, and maize) were declining, in line with normal seasonal trends, particularly in major crop-producing areas. However, prices were still above the five-year average (by 14 percent in the case of millet, 12 percent in the case of sorghum, and five percent in the case of maize). In contrast, the price of imported rice, another key staple food, is down eight percent from last year's levels and 12 percent compared to the five-year average. Prices for groundnuts, the country's main cash crop, are four percent higher than last year and 13 percent above-average. Groundnut production for 2013 is expected to be close to last year's levels (+2 percent) but below the five-year average (by 17 percent). In general, this suggests higher levels of income than last year's levels but still close to average, which will help agricultural households with their access to staple cereals.

- With the availability of fresh crops from ongoing harvests (October to December) and the normal pursuit of income-generating activities, poor households will continue to experience Minimal (IPC Phase 1) food insecurity through March 2014.

To learn more, see the complete October 2013 Remote Monitoring Update for Senegal.

Sierra Leone

- Well distributed rains with good accumulation alongside adequate support from agricultural stakeholders will lead to an above average harvest. The harvest of rice, maize, cassava, and vegetables is ongoing and will continue through December.

- The above average harvest and normal seasonal income generating opportunities are improving poor households' access to food following the lean season and are reducing the need for market purchase. Household food insecurity is expected to remain at Minimal (IPC Phase 1) levels from October through March 2014.

- Imported rice, more predominant in domestic markets until the Sierra Leonean rice harvest reaches markets in November or December, is readily available and affordable to households. The price of imported rice is expected to decline through the end of the year as a result of the combined effects of a decline in demand, the arrival of fresh crops to local markets, and the stable prices on world markets.

To learn more, see the complete October 2013 Remote Monitoring Update for Sierra Leone.

EVENTS THAT MIGHT CHANGE THE OUTLOOK

Table 1: Possible events over the next six months that could change the most-likely scenario

Area	Event	Impact on food security outcomes
Eastern and central basins	• Below-average harvests in Nigeria	• Unusual rise in prices in both basins starting in January 2014 and an escalation in food and nutritional insecurity beyond currently projected levels.
Eastern and central basins	• Escalation in the fighting with Boko Haram and spread of the conflict into Niger, Chad, and Cameroon • Escalation in the political conflict in the CAR • New outbreak of armed fighting in northern Mali	• Disruption of household livelihoods and fewer regular sources of income; • Escalation in food insecurity in northeastern Nigeria, central and southeastern Niger, Chad, the CAR, and northern Mali; • Low market supplies in these areas with fewer traders frequenting local markets; • Shortages of staple foods such as grain on local markets and rising prices; • Unusual decline in food access, particularly by the poor; • Escalation in food and nutritional insecurity, particularly among women and children; • Larger numbers of displaced persons in need of assistance.
Central and eastern basins	• Unusually large and untimely institutional procurements	• Sharp rise in prices on all markets across the region; • Bans on exports by certain countries (such as Burkina Faso or Mali); • Escalation in food insecurity in Niger, Senegal, and Mauritania, the countries most dependent on imports from Mali and Burkina Faso.

ABOUT THIS REPORT

This report presents FEWS NET's most forward-looking analysis of acute food security in this region for the outlook period indicated above. It is based on the work of regional and country analysts, who examine current conditions and local livelihoods as basis for the formulation of regional and country-level assumptions about the future. The analysts compare these assumptions, their potential effects, and the expected responses of relevant stakeholders to establish the most likely scenario for each country.