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SPECIAL REPORT

Summary

FAO/WFP CROP AND FOOD SECURITY ASSESSMENT MISSION TO CENTRAL AFRICAN REPUBLIC

1 March 2016



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HIGHLIGHTS

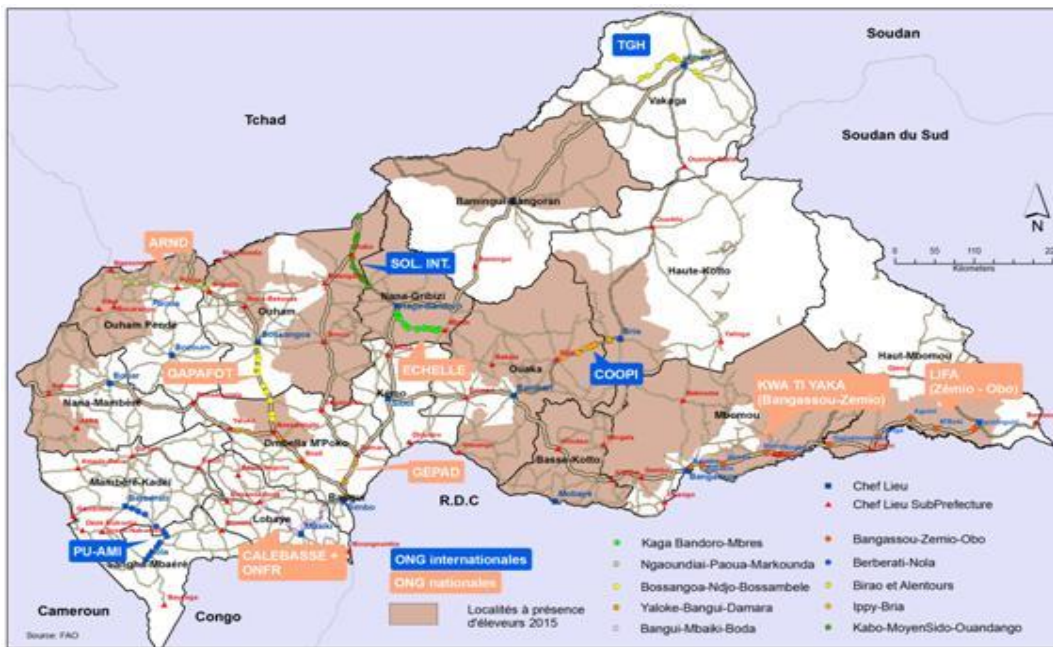
- The unprecedented crisis in the Central African Republic (CAR), which started in December 2012 and has devastated the country's overall economy in 2013, continues to constrain economic recovery through widespread insecurity and frequent episodes of violence, including the serious incidents which took place from September to November 2015 in the capital Bangui and in other areas of the country.
- The Gross Domestic Product, which plunged by 36.7 per cent in 2013, rose by 1.3 percent in 2014, well below the 4 percent growth rate recorded in 2012, before the start of the crisis.
- Crop production in 2015, estimated at 838 671 tonnes, increased by 10 percent compared to 2014 as a result of an increase in cassava production. By contrast, cereal production declined by 4 percent in 2015 compared to 2014
- Persisting insecurity continues to disrupt agricultural activities, and the 2015 harvest, despite the increase compared to 2014, is still 54 per cent below the pre-crisis average. Notably, cereal production declined for the third consecutive year, and in 2015 was 70 percent lower than the pre-crisis average.
- FAO's support mitigated the negative impact of the crisis on food production, with about 170 900 households assisted with seeds and tools. The distributed inputs have yielded a crop production of about 40 000 tonnes. WFP supported the operation by providing seed protection rations.
- Based on the Mission's estimates, a cereal import requirement of 118 846 tonnes for the 2015-16 marketing year (November/October) is forecast. Assuming commercial imports at 33 978 tonnes and the quantity of food aid in stock and pipeline at 48 000 tonnes, the Mission expects an uncovered cereal deficit of 60 000 tonnes, 5 percent up compared to the previous year. The deficit in cassava in 2015/16 is less than half compared to the previous year, but at 10 000 tonnes, it is still sizeable.
- Widespread insecurity continued to have a negative impact on livestock rearing activities. Cattle and small ruminants numbers are currently estimated to have declined by 46 and 57 percent from the pre-crisis levels, respectively.
- Fish supply, which in 2014 was 40 percent below the pre-crisis average, did not increase in 2015, due to insecurity along the waterways, loss of fishing equipment and overexploitation in some areas which led to the exhaustion of fish stocks.
- The large scale deforestation and the non-sustainable gathering practices observed have contributed to the gradual reduction of reserves of Non-Timber Forest Products (NTFP), especially gnetum plants, caterpillars and mushrooms.
- Production of coffee and cotton, the main cash crops grown in the country, has been heavily affected by the crisis, mainly through the abandonment of fields and the destruction of infrastructures. In 2015/16 cotton and coffee outputs are estimated at 10 500 and 8 507 tonnes, respectively, 42 and 28 percent below their pre-crisis levels. Compared to last year, coffee production further declined by 6 percent, while cotton production increased by 11 percent.
- The breakdown in market and trade activities has resulted in severe scarcity of commodities including essential food items, leading to price increases and volatility in Bangui, where inflation rose from 3.5 percent in January 2014 to 18.2 in January 2015, and subsequently declined in the following months to 3.1 percent in October 2015.
- In Bangui, prices of several food items, already at high levels, further increased in October due to trade disruptions following the upsurge of intercommunal violence in September 2015. Prices of groundnuts, wheat flour, beef meat and fish, in October, were between 22 and 87 percent higher than their pre-crisis levels. By contrast, maize prices declined by 25 percent in October 2015 and prices of cassava were stable in recent months. In October 2015, prices of maize were 16 percent lower than their pre-crisis levels, while prices of cassava were around their pre-crisis levels.
- Reduced food availability and access constraints have led to a deterioration of the food security situation: 67 percent of the surveyed groups have indicated that the food security situation has deteriorated compared to 2014. The Integrated Phase Classification (IPC) analysis, currently underway, will provide an updated estimate of the number of people affected by food insecurity.
- To restore the livelihoods and the productive capacity of vulnerable households, it is recommended that FAO and its technical and financial partners continue to provide assistance through the distribution of seeds and agricultural tools.
- It is essential to support and revitalize the livestock sector through specific projects for transhumance (both domestic and cross border), small livestock (pigs, small ruminants and short cycle animals such as poultry, guinea pigs, ducks) and, in the medium term, cattle fattening, especially in Bangui.
- A strong support to the agricultural sector, in conformity with the Programme National d'Investissement Agricole, de Sécurité Alimentaire et Nutritionnelle (PNIASAN), would enable an inclusive economic growth and generate employment and income opportunities.
- The establishment of an agriculture and food security information and early warning system is highly recommended to provide updates and progressively allow for timely, accurate and systematic monitoring and interventions.

OVERVIEW

Following a request from the Government of the Central African Republic, a joint FAO/WFP Crop and Food Security Assessment Mission (CFSAM) visited the country from 26 October to 28 November 2015 to estimate crop production and assess the overall food security situation. In addition to FAO and WFP, the Mission's field teams included representatives from the Ministry of Rural Development, the Bureau of Statistics, four international NGOs (PU-AMI, Solidarités international, COOPI, TGH) and 8 national NGOs (Calebasse, ONFR-FC, GEPAD, GAPAFOT, ARND, Echelle, Kwa Ti Yaka, LIFA).

In Bangui, the mission met with officials from several ministries including the Ministry of Rural Development, the Ministry of Economy, Planning and International Cooperation, the Ministry of Finance and Budget, the Ministry of Water, Forests, Hunting and Fishing, and with relevant staff of the Central African Agricultural Research Institute (ICRA) and of international organizations, including the Bank of Central African States (BEAC), the African Development Bank, the World Bank, the UNDP and the European Commission, to discuss the current situation of the overall economy the agriculture sector and food security and their prospects. The Mission gathered the latest information available on the macro-economic situation, agriculture, trade, economic policy, prices and humanitarian assistance. Concurrently, a field survey was conducted to collect primary data on food production (agriculture, livestock and forestry), agricultural prices and food security. The members of field teams were provided with an intensive training on data collection techniques by the staff of the Ministry of Rural Development, FAO and WFP before the start of the field visits. Field work activities were carried out in a context of widespread insecurity, which constrained the access to several parts of the country. Itineraries and villages surveyed were selected by technicians of partner institutions to ensure the highest possible representativeness of the sample of different agro-ecological zones. The overall sample was composed of 120 villages on 12 road axes (see figure below). Information and data were collected by NGO partners through focus groups working sessions using coded questionnaires.

Figure 1: Central African Republic - Axes and Villages Selected for the CFSAM Field Work



Source: FAO Bangui/Pôle APP.

The analysis of data and information collected by the Mission indicates that the political and military conflict, which resulted in the collapse of the country's economy in 2013, continues to constrain economic recovery. The situation in the country is unstable and volatile, with widespread insecurity and frequent episodes of violence, including the serious incidents that took place from September to November 2015 in the capital Bangui and in other areas of the country including Bambari, which resulted in the loss of human lives and damage to properties and infrastructures. The number of internally displaced persons, which in June 2015 was at its lowest level since early 2014, increased by 21 percent between June and October 2015 to 450 000. These events caused a climate of insecurity and uncertainty that has constrained economic recovery, resulting in a GDP growth rate of 1.3 percent in 2014, well below the 4 percent recorded in 2012, before the start of the crisis. The still negligible tax revenues do not allow the State to provide the basic services to face the current

dire humanitarian situation, with more than half of the population (2.7 million out of a population of 4.6 million)¹ in immediate need of humanitarian assistance.

The 2014/15 season was characterized by generally favorable weather conditions. An early onset of seasonal rains in March was followed by below average rainfall in April. Subsequently, adequate precipitation for the remainder of the cropping season benefited crop development, and in October, according to satellite imagery analysis, vegetation conditions were generally favourable.

Based on the information collected through focus group discussions, crop production in 2015 is estimated at 838 671 tonnes, 54 percent lower than the pre-crisis average but 10 percent up on 2014, due to increased cassava production. By contrast, cereal output, already reduced in the previous two seasons, recorded a 4 percent decrease from 2014, and currently is 70 percent lower than the pre-crisis average. Based on the Mission's estimates, an uncovered cereal deficit of 60 000 tonnes is forecast, 5 percent up compared to the previous year. The deficit in cassava in 2015/16 is less than half compared to the previous year, but at 10 000 tonnes, it is still sizeable.

Production of coffee and cotton, the main cash crops grown in the country, has been heavily affected by the crisis, mainly through the abandonment of fields and the destruction of infrastructures. In 2015/16, cotton and coffee outputs are estimated at 10 500 and 8 507 tonnes respectively, 42 and 28 percent below their pre-crisis levels. Compared to last year, coffee production further declined by 6 percent, mainly due to plant diseases that could not be treated due to the lack of pesticides, while cotton production increased by 11 percent.

The third consecutive below average crop production is due to the persisting insecurity which severely constrained access to land and availability of inputs, negatively impacting planted area and yields. However, cassava plantings increased for the second consecutive year as roots are more difficult to be damaged and looted. FAO's support to crop production helped mitigate the negative impact of the crisis on food production with about 170 900 households assisted with seeds and tools. The distributed inputs have yielded a crop production of about 40 000 tonnes. WFP supported the operation by providing seed protection rations.

The widespread and persistent insecurity in 2015 continued to have a negative impact on livestock rearing and fishing activities. Cattle and small ruminants numbers are currently estimated to have declined by 46 and 57 percent from the pre-crisis levels, respectively. Fish supply, which in 2014 was 40 percent below the pre-crisis average, did not increase in 2015, due to insecurity along the waterways, loss of fishing equipment and overexploitation in some areas which led to the exhaustion of fish stocks.

In Bangui, prices of several food items, already at high levels, further increased in October due to trade disruptions following the upsurge of intercommunal violence in September 2015. Prices of groundnuts, wheat flour, beef meat and fish, in October, were between 22 and 87 percent higher than their pre-crisis levels. By contrast, maize prices declined by 25 percent in October 2015, and prices of cassava were stable in recent months. In October 2015, prices of maize were 16 percent lower than their pre-crisis levels, while prices of cassava were around their pre-crisis levels, largely due to trade disruptions that retained maize and cassava in the producing regions surrounding Bangui.

Reduced food availability and access constraints have led to a deterioration of the food security situation: 47 percent of the surveyed groups have indicated that the food security situation has deteriorated compared to 2014, and 20 percent has indicated that it has sharply deteriorated.

In 2015, the number of households with poor or borderline food consumption increased, due to the declining frequency of consumption of almost all food groups. Between 2014 and 2015, a deterioration of household diet has been observed: households consume less often cereals (5 days per week in 2015 compared to 6.5 days in 2014), legumes (3 days compared to 5 days), animal protein (2 days compared to 3), sugar (3.6 days compared to 5.3 days) and slightly less often oil and fruit.

This aggravation is strongly related to a deep and protracted crisis situation which caused a sharp degradation of the overall economic environment. The response of the food security cluster will aim at protecting and restoring livelihoods. Food security projects involving communities at risk, particularly displaced populations and hosting communities, will help to restore peaceful coexistence, and increase community resilience to shocks.

Results from the ongoing IPC (Integrated Phase Classification) analysis will provide an updated estimate of the number of people affected by food insecurity and are expected to shed more light on the specific humanitarian assistance requirements.

¹ Presentation of the Emergency Agricultural Programme 2015, FAO, May 2015.

