

SPECIAL REPORT

FAO/WFP CROP AND FOOD SECURITY ASSESSMENT MISSION TO MADAGASCAR

20 August 2009

Mission Highlights

- The 2008-09 agricultural season benefited from good rainfall in the main rice production zones throughout the whole country, and particularly in the centre, the north and west. Despite the considerable damage in human and material terms by the cyclones, their impact on agriculture was comparatively slight. Furthermore, good climatic conditions in the main rice-growing zones will benefit off-season rice production which will take off in July-August.
- Conversely, the drought which has ravaged the south of the country lowered the national maize, sweet potato and cassava output because of the substantial contribution made by the south of the country to the production of these crops. The Mission has forecast that maize production at Toliara (southern province) in 2009 might drop by one-half in comparison with last year's, while the output of sweet potato and manioc should fall by 20 percent and 15 percent, respectively.
- The aggregate national cereals requirement (including cassava and sweet potato, expressed in cereals equivalent) should exceed total availability by about 206 000 tonnes. Commercial wheat and rice imports should normally meet this expected shortfall. But there is considerable uncertainty about possible imports in 2009/10 following the government's announcement that it intends to import 150 000 tonnes of rice for sale at a moderate price in the lean season. This announcement, which was made with no prior consultation with the *"Plateforme de concertation et de pilotage de la filière riz"*, (consultative platform to manage the rice sector) is likely to upset commercial imports. For unless the government takes up a clear stance in this regard, the importers might adopt a wait-and-see attitude which would certainly lead to delays or stock drawdowns, and cause very sharp price increases in the lean season beginning in September/October. This would be comparable to the chain of events that led up to the 2004-05 food crisis.
- The state of food supplies, which are fairly adequate at the national level, must not conceal the cereals shortfall and the precarious food situation in most of the southern area covered by the EWS project, where the food economy is largely based on maize, cassava and sweet potato. The inadequate rainfall and the slump in production over the past few years have given a powerful impetus to food price increases in this part of the country. The prices of the main cereals and rootcrops rose between 100 percent and 400 percent between March 2008 and March 2009, before beginning to decline in May. At the same time, the deteriorating state of the herds due to the lack of rangelands and distress sales pushed down livestock prices, leading to plunging terms of trade for the agro-pastoralists. Households are having to cope with a serious lack of access to food, and a marked shortage of seed in the wake of several consecutive years of drought and poor harvests.
- According to EWS estimates, 44 municipalities in the south are now prone to extreme food vulnerability and require both food aid and seed supplies during the inter-season period.



FOOD AND AGRICULTURE ORGANIZATION OF THE UNITED NATIONS, ROME



WORLD FOOD PROGRAMME, ROME

1. OVERVIEW

On account of its geographic position Madagascar succumbs every year – without exception – to the effects of natural disasters, mainly droughts, cyclones and flooding, which routinely strike different regions of the country and affect the food situation of different sections of the population. And in 2008-09 the country was once again stricken by:

- a run of cyclones on the east coast which caused considerable damage to the infrastructure and crops;
- a drought in the southern part of the country, where the people, who are among the poorest in the country, have already been placed in jeopardy by several years of drought, making them extremely vulnerable to any new shocks.

In addition to these climatic disasters, the continuing political crisis and the international economic crisis are having enormous repercussions on public finances, exports, tourism, unemployment, and the national currency, and are impacting on the functioning of certain agricultural channels and industries.

It was against this background that WFP and FAO organised a joint mission to assess the national food situation. The evaluation, which focused on the southern part of the island, was implemented in two main phases. Firstly, a joint FAO/WFP team visited the country from 22 May to 7 June 2009. The mission held meetings in the capital, Tananarivo, and trained enumerators for the household survey which covered most of the country (in the second phase), and visited the southern part of the country which is facing serious food insecurity problems following several years of drought. In Antananarivo, the meetings and information-gathering sessions with various governmental and international organisations and with local and international non-governmental organisations (NGOs) enabled the Mission to take stock of the overall state of food supplies in the country and to gather reports and statistics. The mission then went to the regions of Ambovombe and Amboasary in the south of the country. They held discussions in the field with the staff of the national and regional organisations, field technicians, farmers, traders and the community heads. The mission went into the fields to evaluate the damage caused to the crops and markets, in order to ascertain the availability and prices of agricultural products. The mission worked throughout in close cooperation with the Early Warning System (EWS).

Secondly, teams of enumerators interviewed key informants, discussion groups, and a sample of households in the rice-growing regions in the centre and in the north of the country (Lake Aloatra, Vakinankaratra, Boeny), the eastern regions affected by the cyclone (Atsinanana), and the southern regions affected by the drought (Androy, Anosy, Atsimo Andrefana). These interviews also covered food production, markets and incomes, the food situation and future prospects. This evaluation phase took place from 1 to 25 June 2009.

The information and data gathered made it possible to estimate the state of food availability nationwide, and the food situation in the south of the country.

Production varies very widely. At the national level, the 2008-09 cropping season was marked by good rainfall in the main production areas of the country, particularly in the centre, north and west. Despite the considerable human and material damage caused by the cyclones, the impact on agriculture was slight. Furthermore, the good climatic conditions between October 2008 and April 2009 in the main rice-growing zones will be favourable to off-season rice growing which will take off in July/August. Even though the present political situation makes it impossible for the government action undertaken last year to continue, it is expected that the off-season output will be substantial. The Mission estimates that paddy production will be about 4.2 million tonnes, which is an increase of approximately 8 percent above last year's good production levels. Conversely, the drought which devastated the South has caused national maize, sweet potato and cassava production to slump, because of the substantial contribution made by the south of the country to the production of these crops. In recent years the province of Taliara has contributed about 30 percent and 20 percent for maize and sweet potato, respectively, to national aggregate production. According to the Mission's estimates, maize production in 2009 at Taliara is forecast to be half last year's level, while sweet potato and cassava production should fall by 20 percent and 15 percent, respectively.

At the national level, the aggregate cereals requirement (including cassava and sweet potato expressed in cereals equivalent) should exceed total cereals availability by about 206 000 tonnes. Commercial wheat and rice imports should normally cover this shortfall because there are no major problems with the functioning of the trading system. However, there are serious doubts about possible imports in 2009/2010 following the government's announcement of its intention to import 150 000 tonnes of rice to be sold at moderate prices during the lean season. This announcement, which was made without any prior consultation with the "Plateforme de concertation et d'épilotage de la filière riz", (consultative platform to manage the rice sector), is likely to upset the commercial import markets. For unless the government takes up an unambiguous stand on this subject, importers might adopt a wait-and-see approach which would certainly lead to delays or breakdowns in stocks, causing a price explosion during the lean season beginning in September/October. This situation is reminiscent of the timing of the events that led to the 2004-05 food crisis.

Conversely, the province of Toliara in the south of the country has a surplus of about 8 000 tonnes, mainly thanks to adequate rice output in the main production areas in the districts of Menabe and Atsimo Anrefana. But because of the diversity of production systems in this province, this figure conceals the cereals shortfall and the precarious state of food access in most of the southern zone covered by the EWS project, where the food economy depends, to a large extent, on maize, cassava and sweet potato. After several consecutive years of drought and poor harvests, most households in the affected area in the south are facing a shortage of seed and a serious lack of access to food.

According to EWS estimates, the people living in 44 municipalities in the south are now exposed to extreme food vulnerability. Furthermore, surveys conducted by ONN and UNICEF in three municipalities in the Anosy region and in two municipalities in the Androy region between March and April 2009 have revealed the prevalence of global acute malnutrition among 14.5 percent and 10.9 percent of the population of Anosy and Abdroy, respectively. Severe acute malnutrition is thought to affect about 3 percent of the children in the districts surveyed at Anosy and 1.5 percent in the districts surveyed in Androy.

It is recommended that the most vulnerable households should be targeted not only with food assistance but also seed distribution, to enable the affected households to begin the new cropping season under the best possible conditions in September 2009.

This report has been prepared by Jean Senahoun (FAO) and Koffi Akakpo (WFP), under the responsibility of the FAO and WFP Secretariats with information from official and other sources. Since conditions may change rapidly, please contact the undersigned for further information if required.

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