



**NORTHERN GHANA FOOD SECURITY
AND NUTRITION MONITORING SYSTEM**

MONTHLY BULLETIN



July 2010

Regional Highlights

Northern region

- Food insecurity conditions intensified in July as more households in reporting sentinel sites depleted their food stocks from last year's production. Compared to June 2010, the proportion of sentinel sites which reported depleted food stocks increased by 2 percentage points.
- Daily food consumption has also declined in response to widespread depletion in food stocks. In 67% of the reporting sentinel sites, households mostly consume two meals per day, up from 58% in June 2010.
- Maize prices for referenced markets in July remained lower than the five-year average and last year's price. Kumbungu market was 2% below the five-year average and 18% lower than July 2009. Similarly, maize price for July in Savelugu market was 37% lower than that of July 2009 and 19% lower than the five-year average. The low prices of cereal grains do not hold good prospects for farmers as the expected shortfall in their revenue from the sale of farm produce may affect the number of acres cultivated during this current season.
- Goat-to-maize terms of trade in the region were 71kg, which is comparable to the previous month, but up by 10kg from July 2009. Similarly, the labour-to-maize terms of trade at 6.7 kg are comparable to the previous month.

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Upper East Region

- In 75% of the reporting sentinel sites, food stocks are on the verge of depletion, up from 55% in July 2010. The fragile food security situation hampers adequate food consumption, with 75% of sites currently consuming 2 meals per day. In June 2010, 64% of sentinel sites relied on 2 meals.
- Maize price is currently at its lowest level in two referenced markets (Bawku and Bolgatanga) in the region since the beginning of the year. The average price of 100 kg maize in these markets is GH¢ 40.5, down from GH¢ 63 in July 2009. This represents a 35.7 percentage point decrease from last year. Bawku market was 7% lower than the five-year average and 30% lower than the previous year. At Bolgatanga, the price of maize was 7.8% lower than the five-year average and 41% lower than the previous year.
- The goat-to-maize terms of trade at 62.5 kg represent an improvement over June 2010 when it stood at 55.6 kg. This is due to a slight increase in the price of small ruminants. Similarly, the labour-to-maize terms of trade at 6.2kg are comparable to the previous month.

Upper West

- In 81% of the reporting sentinel sites, cereal stocks are already exhausted. Similarly, 81% of these sentinel sites consumed 2 meals per day in July 2010, up from 50% in July 2009.
- Between June and July 2010, the price of maize increased by 12% in both Tumu and Wa markets. This represents a slight deviation from the normal trend and could likely be an indication that market stocks are gradually declining while demand remains high. It could also be a reflection of market speculations and anxiety about the quality of the next harvest, particularly given the irregular distribution of precipitation during the current season which culminated in widespread late planting in the region.
- The current maize-to-labour terms of trade at 8.3kg remain comparable to the level reported in June 2010. Similarly, the goat-to-maize terms of trade from reporting sentinel sites at 87kg are comparable to June 2010. This is attributable to the relatively high prices of small ruminants.
- Seasonal precipitation trends are unsatisfactory in 63% of sentinel sites as intermittent dry episodes caused localized wilting of crops, late planting and delays in the application of inputs. However, this remains lower than the 90% of sentinel sites which reported poor rains in July 2009.

The Food Security and Nutrition Monitoring System is implemented by the
**STATISTICS, RESEARCH AND INFORMATION DIRECTORATE of the
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In cooperation with:

**Ministry of Health/Ghana Health Service
United Nations World Food Programme**

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1. Progress of the season in Northern Ghana

The 2010 growing season in northern Ghana has been characterized by significant interruptions in rains, causing poor germination of planted crops, varying degrees of crop stress and widespread late planting in some of the major food producing districts. The current seasonal rains in the worst affected districts (particularly in the Northern Region) are below normal when compared to the long term average for July (Figure 1). Figures 2 through 4 show the distribution of precipitation in July 2010. Dry episodes in the first dekad were confined to the Municipality of Bawku, West Mamprusi, Builsa and the Kassena-Nankana Districts. In the second and third dekads, these dry spells were mostly prevalent in the Northern Region, thus denting the prospects for completion of all late planting before the end of the month.

District level MIS officers of MoFA estimate that 20% to 30% of farmers in the worst affected districts planted in late July due to a combination of erratic distribution of precipitation and the late arrival of equipments and some inputs for the Block farm system. The late arrival of NPK fertilizer in some locations hampered its timely application to field crops with reduced yield expected in cases where NPK could not be applied at the right time.

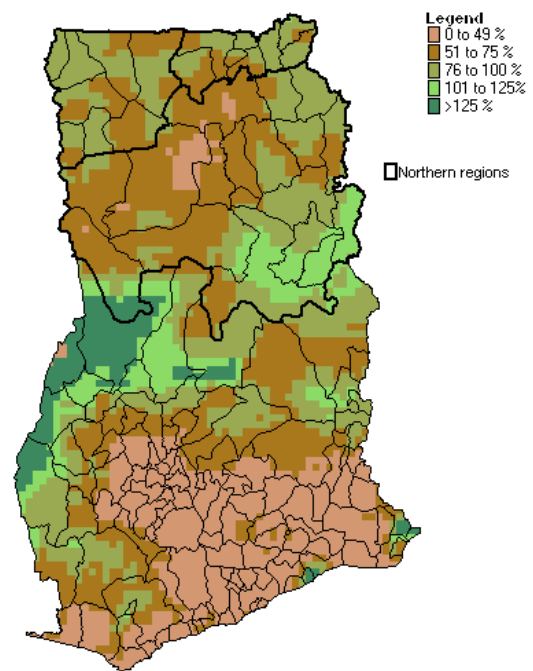


Figure 1. Percent of rainfall in July 2010 compared to the long term average for July
Source:FEWS/USGS

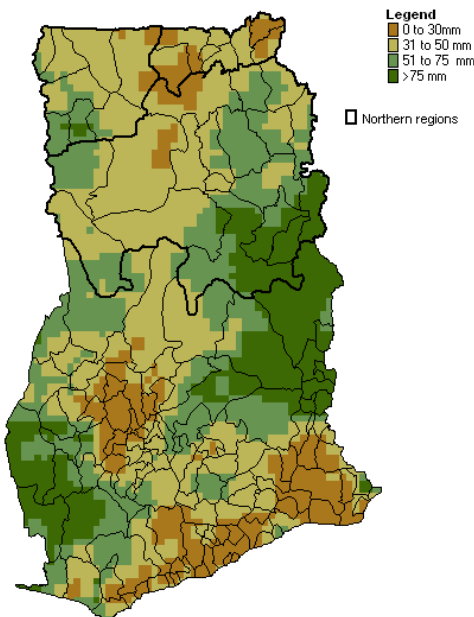


Figure 2. Rainfall estimates for the first dekad of July 2010
Source: FEWS/USGS

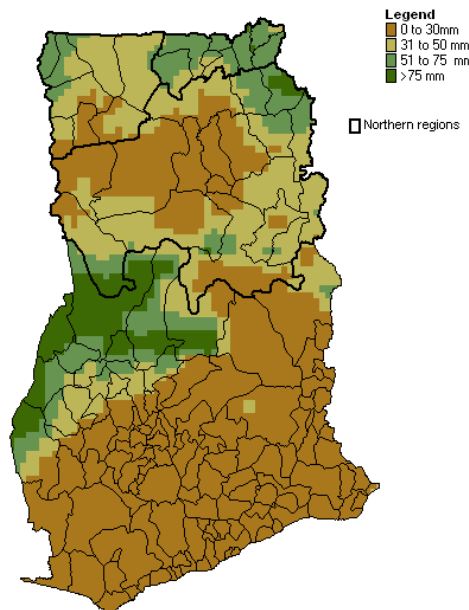


Figure 3. Rainfall estimates for the second dekad of July 2010
Source: FEWS/USGS

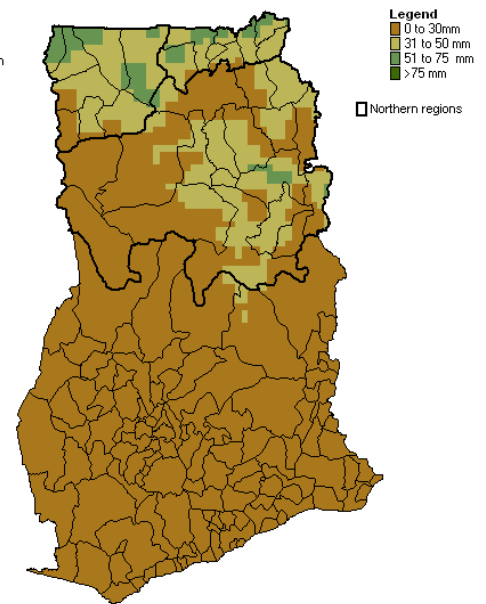


Figure 4. Rainfall estimates for the third dekad of July 2010
Source: FEWS/USGS

The districts reporting mixed growing conditions and widespread late planting include Wa Municipal, Wa East (Upper West Region), Gusheigu, Karaga, Bole, West Gonja, East Gonja, West Mamprusi, Sawla-Tuna-Kalba, and Yendi in the Northern Region.

Maize and rice have been particularly affected this year with the delay in planting likely to cause a decline in yields in the event of an early stoppage of the rains. The quality of yields from these late planted crops depends largely on the continuation of seasonal rains until the end of October. During most normal agricultural years in northern Ghana, the rains usually cease by the third week of October. Given the large number of farmers who planted in July, the cessation of seasonal rains before the end of October may likely reduce yields of the affected crops and create significant economic loss from the investment in inputs.

Most maize crops are currently flowering and fertilizing, but early planted maize are at the stage of grain filling and maturity with crop conditions described as fair to good. However, in parts of the major producing districts such as East Gonja, Central Gonja, West Gonja, Karaga, Gusheigu, Karaga, Saboba, Cherepone and Yendi which experienced high incidence of late planting, crops are generally in the vegetative stage. Rains are generally expected to intensify in August and September and the likely spillage of water from the Bagri Dam in Burkina Faso could cause flooding in some communities along the tributaries of the Volta River.

2.0 Food Security Summary

Food security conditions in northern Ghana deteriorated further between June and July as is typical of the “lean season”. The proportion of sentinel sites consuming 3 meals per day in the three northern regions declined from 28% in June to 18% in July. Current food security conditions are characterized by extremely low to depleted stocks, resulting in increased dependence on market purchases to complement daily food consumption. Cereal availability in both rural and urban markets continues to be satisfactory and the relatively low prices may be an incentive for improving food access. Thus, access to cereal through market purchases is generally expected to be better than the “lean season” of 2009, even though income sources are constrained by limited income-generating activities.

The 2009 CFSVA estimated that 1.2 million people are food insecure in Ghana with 34% of households in Upper West, 15% in Upper East and 10% in Northern region said to be food insecure. These food insecure households most likely could not meet their cereal needs in July when food access became highly constrained as a result of depleted food stocks. About 62% of sentinel sites in the three northern regions reported depleted cereals which is the highest proportion since the beginning of the year. The food security condition of these households will remain fragile until the major harvest of crops in late September.

The harvest of early millet began in July in the Upper East Region, and is expected to reinforce household food stocks for at least one month. Yields of early millet are reported to be satisfactory for households which cropped early, with average yields attained by those who planted late in May.

The prevailing low prices of cereal grains in markets do not hold good prospects for farmers as the expected shortfall in their revenue from the sale of farm produce may affect the number of acres cultivated during this current season. Most farmers are unable to raise funds from the sale of last year’s produce following the suspension of purchases by the National Buffer Stock Company due to the lack of storage infrastructure. Poor demand for cereal commodities may likely serve as a disincentive to increased production as farmers may be unable to recover the cost of investment for the previous farming season. With commercial banks currently maintaining high lending rates at between 25% and 38%, accessing loans for farming is impossible for most small holder farmers.

2.1 Northern Region

Food insecurity conditions intensified in July as more households in reporting sentinel sites exhausted their food stocks from last year’s production. Compared to June 2010, the proportion of sentinel sites reporting depleted food stocks is 2 percentage point high. This represents a 25 percentage point increase from July 2009 when 35% of sentinel sites reported depleted food stocks. Early harvest of yam in the eastern corridor of the Northern Region began in July, but prices remain high and tubers are of smaller sizes.

Daily food consumption has also declined in response to the widespread depletion in food stocks. In 67% of the reporting sentinel sites, households mostly consume two meals per day, up from 58% in June 2010. In the most likely

food security scenario, further decline in frequency of daily food consumption could occur in some households before the major harvest in September.

Whereas 53% of sentinel sites were concerned about dry episodes punctuated with intermittent rains in July 2010, only 38% had concerns about the rainfall situation in June 2010. **The relative stability in food prices continues to induce favourable terms of trade between the most viable sources of income and staple cereals. Goat-to-maize terms of trade in the region were 71kg which is comparable to the previous month, but up by 10kg from July 2009.**

2.2 Upper East Region

Localized harvest of early millet in late July is enabling households to temporarily improve their access to food in some parts of the region. The late onset of rains in Bawku Municipality and parts of the Bawku West Districts hampered the timely planting of these early maturing crops. As a result, late planted early millet is reported to have performed poorly with widespread food insecurity expected to persist in these districts for the next two months.

In 75% of the reporting sentinel sites, food stocks are on the verge of depletion, up from 55% in June 2010. The fragile food security situation also hampers adequate food consumption with 75% of sites consuming 2 meals a day. In June 2010, 64% of sentinel sites relied on 2 meals. The goat-to-maize terms of trade at 62.5 kg is an improvement over June when it stood at 55.6 kg. This is due to a slight increase in the prices of small ruminants. Similarly, the labour-to-maize terms of trade at 6.2kg are comparable to its level for the previous month.

2.3 Upper West Region

Food security conditions are generally precarious in the region following successive months of decline in food stocks as is characteristic of the “lean season”. These conditions are expected to persist in August, but significant improvements are likely from September when the harvest of early planted cereals begins in earnest. Despite the steady market supply of cereal grain and low prices relative to 2009, most marginal agricultural farm households may have been unable to improve their access to food or increase daily food consumption as income earning opportunities are constrained. The slight increase in prices between June and July in most markets in the region may further dent the prospects of increasing access to food by those market-dependent households.

In 81% of the reporting sentinel sites, cereal stocks are already depleted. Similarly, 81% of these sentinel sites consumed 2 meals per day in July 2010, up from 50% in July 2009. With widespread late planting reported in parts of the region, stock levels and food access are not likely to improve significantly among vulnerable households for another two months. Seasonal precipitation trends remain unsatisfactory in 63% of sentinel sites as less than normal rains caused localized wilting of crops, late planting and delays in the application of inputs. However, this remains lower than the 90% of sentinel sites which reported poor rains in July 2009.

The current maize-to-labour terms of trade at 8.3kg remain comparable to the level reported in June 2010. Similarly, the market for small ruminants is competitive with the result that the goat-to-maize terms of trade at 87kg remain comparable to June 2010.

Price trends and marketing activities

3.1 Northern Region

Rural and urban markets are adequately supplied with cereals from last year’s harvest, helping to stabilize prices of major staples in the region. Price drops in all markets relative to July 2009 are significant, but large quantities of tradable stocks remain locked up in warehouses as traders and farmers are unable to find buyers to clear up those stocks. Maize prices for referenced markets (Kumbungu, Savelugu, and Tamale) in July remained lower than the five-year average and last year’s price. Kumbungu market was 2% below the five year average and 18% lower than July 2009. Similarly, maize price for July in Savelugu market was 37% lower than that of July 2009 and 19% lower than the five-year average. In Tamale, the price of maize was 29% lower than its level for July 2009 and 1.7% lower than the five-year average (Figure 5).

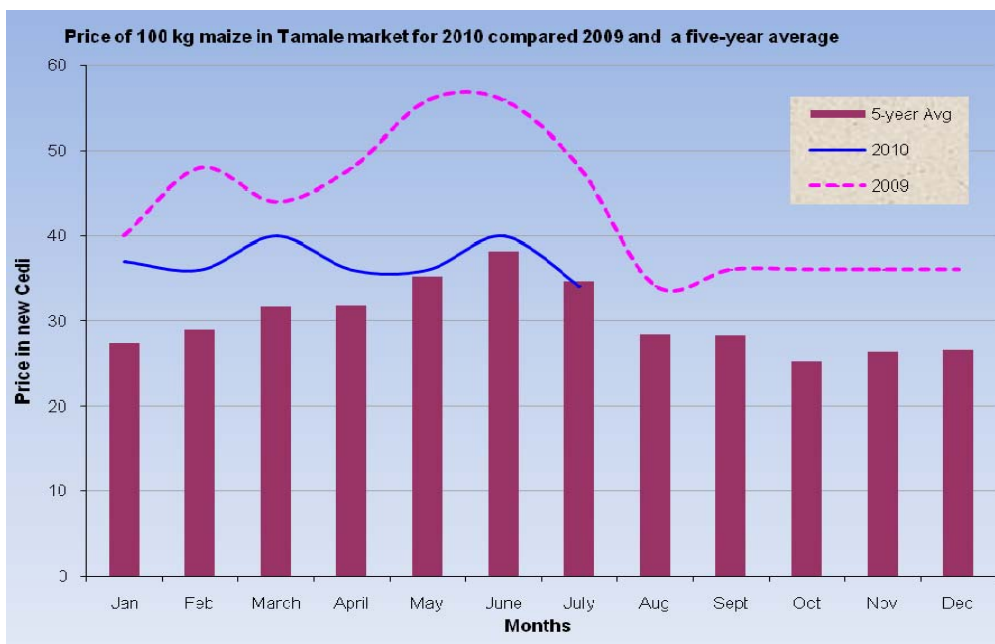


Figure 5. Price of maize in Tamale market
Source: MoFA/SRID

Thus, market prices have shown signs of stability in some markets while price decreases have been recorded in others, raising prospects of increased access to food for the growing number of food insecure rural and urban poor during the rest of the lean season. In both Tamale and Savelugu markets, the price of maize decreased by 15% and 10% respectively between June and July 2010. However, it remained unchanged in Kumbungu.

3.2 Upper East Region

While cereals are in good supply in both rural and urban markets in the region, security concerns remain a major constraint to trade and other activities in the Bawku Municipality. In July, the supply of small ruminants (goats etc) in Bolgatanga and other major markets was below the level for July 2009 and as a result prices were relatively high. Such sales are being undertaken for a broad range of reasons, including the acquisition of food, seeds and agricultural inputs.

Maize price is currently at its lowest level in the two referenced markets (Bawku and Bolgatanga) in the region. The average price of 100kg maize in these markets is GH¢ 40.5, down from GH¢ 63 in July 2009. This represents a 35.7 percentage point decline from last year. Bawku market was 7% below the five-year average and 30% lower than the previous year (Figure 6). At Bolgatanga, the price of maize was 7.8% below the five-year average and 41% lower than the previous year.

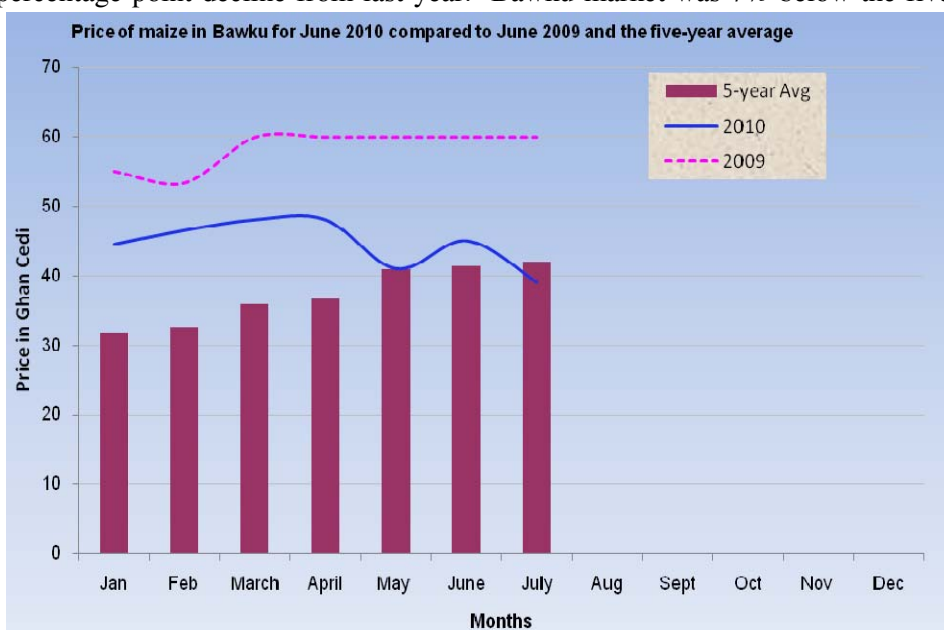
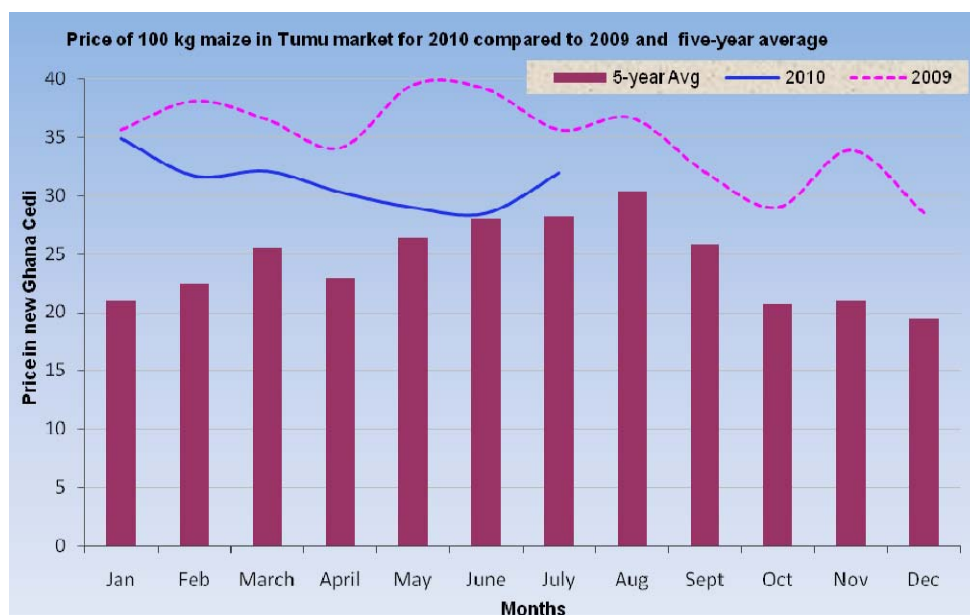


Figure 6. Price of maize in Bawku Market
Source: MoFA/SRID

Reduced prices of food commodities may strengthen market purchases or improve food consumption among households that have already exhausted their food stocks during the remainder of the “lean season”. The price decrease in July and its conformity with normal prices trends in the region is most likely an indication that the market anxiety which characterized the month of July in the Upper West Region does not exist in the Upper East Region

3.3 Upper West Region

Cereal supply in the region is generally sufficient to meet the current market demand, with prices remaining low relative to the same period last year. Markets in the Upper East Region continue to benefit from large quantities of food supplies from this region. However, between June and July 2010, the price of maize increased by 12% in both Tumu and Wa markets. This represents a slight deviation from the trend during the same period in 2009 and may be an indication that market stocks are gradually reducing while demand remains high. It could also be a reflection of market speculation and anxiety about the quality of the next harvest, particularly given the irregular distribution of precipitation during the current season which culminated in widespread late planting.



The current price of maize is 10% lower than in July 2010 and 13% higher than the five-year average for Tumu market. The increase in price will likely increase pressure on market-dependent households whose stocks have already run out.

The current price of maize is 10% lower than in July 2010 and 13% higher than the five-year average for Tumu market. The increase in price will likely increase pressure on market-dependent households whose stocks have already run out.

Figure 7. Price of maize in Tumu market
Source: MoFA/SRID

4.0 Health and Nutrition

In view of technical difficulties encountered no data is presented

5.0 Conclusions

Availability: Most rural and urban markets are sufficiently supplied with cereals, helping to keep prices of major staples low relative to 2009. While cereals are in good supply in both rural and urban markets in Upper East Region, security concerns remain a major constraint to trade and other activities in the Bawku Municipality.

Access: With the exception of the Upper West Region, the price of maize grain is at its lowest level since the beginning of the year. The decreasing prices may facilitate improved food access for poor market-dependent households in northern Ghana.

Utilization: Decreased access to food, which is typical of the “lean season”, will likely be associated with irregular and poor quality of meals for children under 5 years of age and generally poor nutritional status of other vulnerable groups like pregnant and lactating mothers.