

Food Security in Libya- An Overview

LIBYA

April 2011



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This is a Working Paper based on

Secondary data analysis of the pre-crisis situation in Libya

and

Observations of the WFP/FAO Mission to Eastern Libya

DISCLAIMER: This Working Paper is a collection of secondary data and field observations. It is supposed to evolve as fresh information is made available. As such, it is a platform to invite contributions from various stakeholders. Comments and additions are welcome. The Food Security Cluster secretariat will update the master copy.

World Food Programme - Regional Bureau for the Middle East, ODC

Food and Agriculture Organization – Regional Near East Bureau, TCES Emergency Unit

April 2011

Table of Contents

INTRODUCTION	1
I – CONTEXT	1
1.1 - Geography	1
1.2 - Political context	2
1.3 - Population	3
1.4 - Education	4
1.5 - Gender	4
1.6 - Economy	5
1.7 - Infrastructure	7
II - FOOD PRODUCTION	8
2.1 Pre-crisis agricultural production	8
2.1.1 - Crop production	10
2.1.2 - Animal production	10
2.1.3 - Fisheries	11
2.1.4 - Findings of the Rapid Assessment in Eastern Libya - April 2011	11
2.2 - Changes in agricultural production since the crisis and perspectives	11
III - FOOD IMPORTS, MARKET SUPPLY AND PRICES	12
3.1 Pre-crisis food trade and markets	12
3.1.1 – Food imports and exports	12
3.1.2 - Public food distribution system	14
3.1.3 – Food prices	14
3.2 – Food market and price changes since the crisis and perspectives	15
IV - HOUSEHOLD ECONOMIC ACCESS TO FOOD	17
4.1 - Household income levels and sources	17
4.1.1 – Pre-crisis poverty	17
4.1.2 – Pre-crisis income sources	17
4.1.3 – Pre-crisis situation of migrants	18
4.1.4 – Poverty and income changes since the crisis and perspectives	19
4.2 - Food assistance programmes	20
4.2.1 - Government social protection and food subsidy system	20
4.2.2 - Non-governmental organizations and Libyan Red Crescent	21
4.2.3 – Food assistance changes since the crisis and perspectives	21
V - HOUSEHOLD FOOD CONSUMPTION AND UTILIZATION	22
5.1 - Food consumption patterns	22

5.2 - Nutritional status.....	22
5.3 - Child feeding practices	23
5.4 - Health	23
5.5 - Water.....	24
5.6 - Sanitation	24
5.7 - Housing.....	25
VI - CONCLUSIONS ON THE HOUSEHOLD FOOD SECURITY SITUATION.....	26
6.1 - Severity of household food insecurity.....	26
6.2 - Main characteristics of food-insecure households and individuals	27
6.3 - Location of food-insecure households	28
6.4 - Number of food-insecure people	28
6.5- Suggestions for a rapid Emergency Food Security Assessment (EFSA).....	30
BIBLIOGRAPHY	31

List of Figure

Figure 1: Quantities of main crops and animal products in 2008	9
Figure 2: Top Imports	12
Figure 3: Main Food Imports 2008	13
Figure 4: Main Agricultural and Food Exports in 2008.....	14
Figure 5: Change of Consumer Price 2008-2010	15
Figure 6: Labour Force Employment- share by Sector 2001-2007	18
Figure 7: Share of Kilocalories Provided by Main Food Items 2005-2007.....	22

List of Tables

Table 1: Context.....	1
Table 2: The main crop commodities produced in Libya	9
Table 3: Main Commodity	13

INTRODUCTION

This secondary literature review and analysis of the food security situation in Libya was undertaken to provide background information on the situation predating the civil conflict which began mid-February 2011 with a popular uprising in Benghazi. It aims at estimating the levels of pre-crisis household food insecurity and identifying the underlying and basic factors, including food production and trade, household economic access to food (including poverty levels, sources of income and expenditures), food consumption patterns, and social assistance programmes.

Changes in the food security situation and factors due to the crisis, and short-term perspectives are also mentioned, even though they are based on assumptions and a few qualitative reports rather than quantified evidence at this stage.

The pre-crisis information and preliminary changes will be combined with primary data collected on households and markets whenever conditions allow for such assessment, to inform appropriate food security responses and targeting criteria.

I – CONTEXT

Table 1: Context

LIBYA Source: United Nations Statistics Division – Sept. 2010	Indicator value	Year
Surface Area (square kilometers)	1,759,540	2008
Human Development Index	0.847 (55 th in the world)	2007
Population in 2008 (estimated, 000)	6,294	2008
Population growth rate (avg. annual %)	2.10	2005-2010
GDP: Gross domestic product (million current US\$)	90,822	2008
GDP: Growth rate at constant 1990 prices (annual %)	6.7	2008
GDP per capita (current US\$)	14,429.5	2008
GNI: Gross national income per capita (current US\$)	14,581.9	2008
Agricultural production index (1999-2001=100)	102	2008
Unemployment (% of labour force)	N/A	N/A
Labour force participation, adult female pop. (%)	26.1	2008
Labour force participation, adult male pop. (%)	77.2	2008
Sex ratio (men per 100 women)	107.0	2009
Life expectancy at birth (women and men, years)	76.9/71.7	2005-2010
Infant mortality rate (per 1000 live births)	18.0	2005-2010
People Living with HIV/AIDS (all ages) (thousands)	N/A	N/A
Adult HIV/AIDS prevalence rate (%)	N/A	N/A
Deaths due to HIV/AIDS (per 100,000 population per year)	N/A	N/A
Education: Government expenditure (% of GDP)	2.7	2005-2008
Seats held by women in national parliaments (%)	7.7	2009

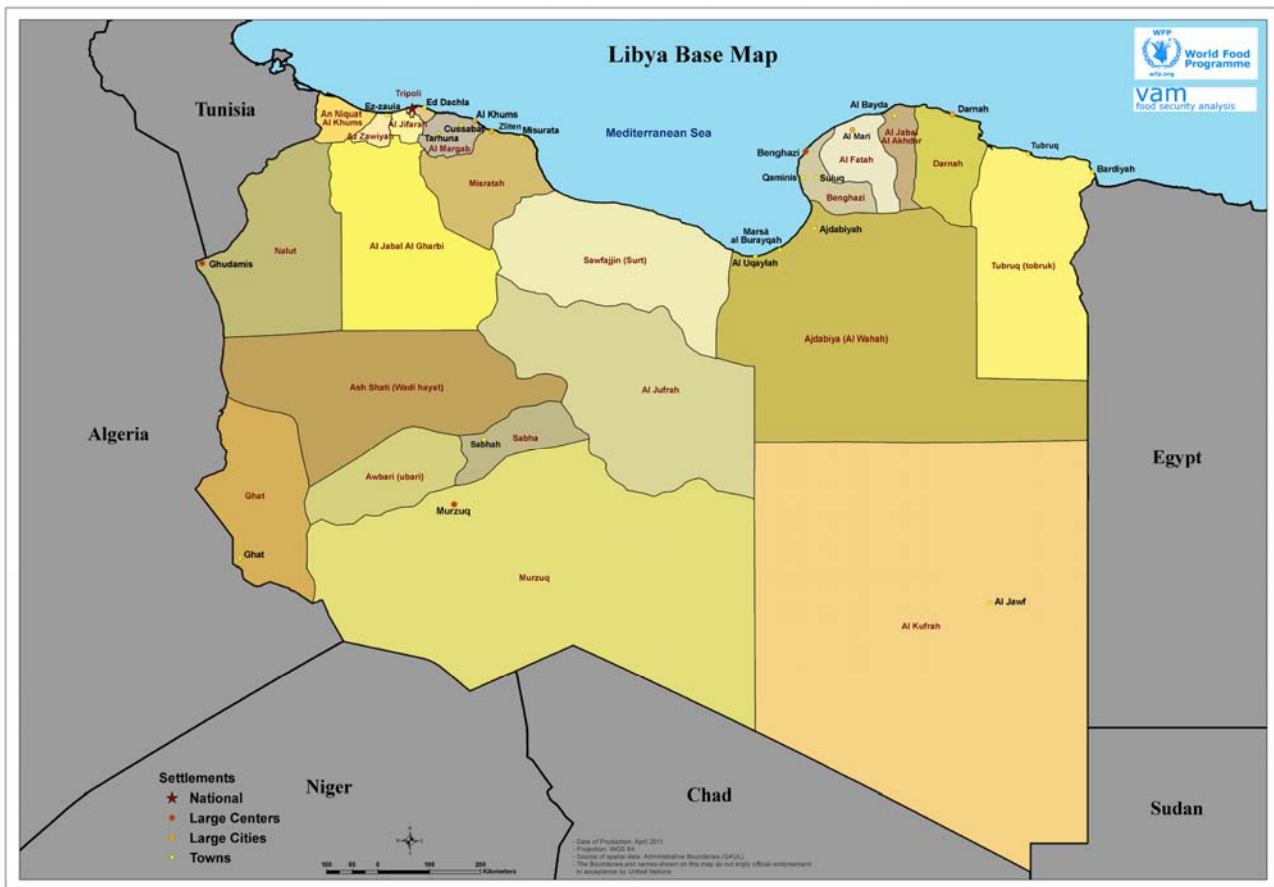
1.1 - Geography

Libya is bordered by Egypt and Sudan in the east, Algeria and Tunisia in the west, Chad and Niger in the south, and the Mediterranean Sea in the north. It covers an area of 1,775,500 km².

Libya is composed of 3 main regions: Tripolitania in the west (where the capital Tripoli is located, along the Mediterranean coast), Cyrenaica in the east (where Benghazi, the 2nd largest city, is located) and Fezzan in the south (which includes Sebha and Al Khalij areas). The south is sparsely populated, and living conditions and amenities are rudimentary outside oil-exploitation areas.

Coastal areas of Tripolitania and Cyrenaica are where more rain is falling and thus where most agricultural activity takes place. There are occasional oases in the desert. The extensive oil and gas fields are mostly in the desert interior, although there are also a number of offshore fields.

Map 1: Location



1.2 - Political context

Pre-crisis situation

Libya gained its independence in 1951. Since 1977 it has been a *Jamahiriyah* (republic of all people) in accordance with the theory propounded by Colonel Qadhafi, which is a blend of socialist and Islamic theories inspired by tribal traditions. In theory, all people are involved in government through participation in local Basic People's Congresses (BPC), but in practice public confidence in this system is limited and participation is low.

In 1992 Colonel Qadhafi divided Libya into 1,500 *mahallat* (communes), each with its own budget and legislative and executive powers. There are 22 *shaabiat* (administrative units) which are the main authority responsible for the governance of local affairs through BPCs. The *mahallat* and BPCs are supervised by Revolutionary Committees directed by secretaries who are chosen personally by Colonel Qadhafi.

Having renounced its weapons of mass destruction programme in 2003 and resolved its outstanding political disputes with the United Nations, the United States and the European Union, in 2008 Libya finally overcome almost 2 decades of international sanctions and isolation. Libya has held the presidency of the African Union and the Maghreb Union since 2009.

Civil society organisations and non-governmental organizations have emerged in recent years but their capacities and independence (especially vis-a-vis human rights) are limited.

Changes since the crisis and perspectives

- The regime of Colonel Qadhafi used extreme force to crack down on the uprising that began in mid-February in Benghazi. Civil war is ongoing as pro- and anti-regime forces battle for control of the country. The opposition has set up the Transitional National Council of the Libyan Republic in Benghazi¹.
- The United Nations, the Economic Union and the United States have imposed sanctions on Colonel Qadhafi, his family and Libyan institutions. The Arab League also excluded Libya.

1.3 - Population

Pre-crisis situation

The population is estimated at about 6 million persons in 2010², concentrated in urban areas (85% urban). The capital Tripoli comprises 1.15 million inhabitants, followed by Benghazi (636,000), Misurata (360,000) and Al Mirqab (328,000). The population density of 3 persons/m² is one of the lowest in the world. Although declining, the population growth rate is high, at 2.5% on average over the past 20 years. The population is thus fairly young, with 35% under the age of 18.

The main ethnic groups are Berber and Arab (97%).

Libya is ranked 53 out of 169 countries according to the Human Development Index³ of 2010. Libya's HDI is 0.755, above the regional average for Arab States of 0.590. Life expectancy at birth was 74 years (77 years for females and 72 years for males) in 2009.

As a result of Colonel Qadhafi's ideals of African unity and pan-Arabism, Libya pursued a relatively open-door policy towards most other African nations in the 1970s and 1980s. Perception of immigrants turned negative in the 2000s when their number reached 2 million. At present, an estimated 1/3 of the population is foreign - between 2-2.5 million migrants, of which only 1-1.5 million is officially registered -, principally from other Arab states and Sub-Saharan Africa⁴. The largest number of migrants is from Egypt (over 1 million) and countries from Sub-Saharan Africa (1.5 million). Smaller numbers of migrants originate from Tunisia (number unknown), Pakistan (80,000), Bangladesh (50,000), the Philippines (26,000) and about 2,000 from Nepal⁵. About 2/3 of the migrants are male and 1/3 female. There are also an estimated 8,000 refugees and 3,000 asylum-seekers, mostly from Palestine, Sudan, Iraq, Eritrea, Somalia and Chad.

An estimated 85% of the population lives in or around the coastal cities, especially the capital Tripoli and Benghazi, well away from the pockets of the oil industry. In 2001, more than 1/3 of urban dwellers were living in slums⁶.

Changes since the crisis and perspectives

- As of mid-April 2001, an estimated 0.51 million migrants (foreign workers) had left Libya since the beginning of the crisis in February⁷. The largest numbers went to Tunisia (about 245,000) and Egypt (209,200), and smaller numbers to Niger (34,400) and Algeria (14,100). Crossing of about 6,200 persons also took place to Chad and 2,800 to Sudan. An increasing number of Libyan families was also crossing the border into Tunisia and Egypt.
- Internally displaced persons are reported in both the east and west of Libya.
- Internal displacement is also modifying the distribution of the population between regions and cities. The situation remains very fluid.
- An escalation of the conflict could lead to massive border crossing of people seeking refuge outside Libya, adding to the burden of neighbouring countries already hosting migrants who have departed.

¹ The Transitional National Council is headed by the former justice minister under the Qadhafi regime.

² According to sources, figures vary from 5.7 million to 6.5 million persons.

³ The Human Development Index is a composite measure of the average achievement in life expectancy, adult literacy and GDP per capita.

⁴ The Economist Intelligence Unit. Libya Country Report, March 2011. If only migrants officially registered are counted (1 million), they would represent 10% of the population.

⁵ IOM MENA report, 28 February 2011. *Quoted in:* ACAPS. Libya Secondary Data Review. 21 February-3 March 2011.

⁶ UN-HABITAT 2001. *Quoted in:* UNICEF. The State of Children and Women in Libya. November 2010.

⁷ OCHA Libya Crisis Situation Report No.24 – 12 April 2011.

1.4 - Education

Pre-crisis situation

Education is free and compulsory starting at 6 years of age. Literacy rates are among the highest in North Africa, estimated at around 88% for those aged over 15 years and 100% for youth of 15-24 years of age⁸. Female youth (15-24 years) literacy rose from 61% in 1997 to almost 100% in 2008. Overall combined primary, secondary and tertiary enrolment rate in 2004 was 94%. Data on school dropouts, repeaters and those not completing the cycle are lacking. No information is available on access to school in remote and desert areas.

However, the education sector faces challenges including teacher competence (many are recruited among the unemployed), out-dated teaching methods, and inadequacy of the curriculum to the needs of the labour market⁹.

Migrant children do not benefit from the free (and compulsory) education. Education fees can reach US\$2,000 per child per year¹⁰.

Main changes since the crisis and perspectives

- School facilities may be destroyed or occupied by displaced persons (even in non-directly impacted areas), and insecurity will prevent children from attending. Schools are closed in the eastern areas controlled by the Transitional National Council. The impact on learning and later livelihoods will depend on the length of the process and trauma suffered by affected children.

1.5 - Gender

Pre-crisis situation

Although under Libyan legislation women are granted equal rights compared to men, and all forms of gender-based discrimination are banned, women's rights are not fully realized due to socio-cultural norms that restrict women's freedoms inter alia in respect to inheritance and access to labour markets.

On the positive, progress has been made in female enrolment at all levels of education. In 2006, the ratio of girls to boys in the primary education was 96%, and the ratio in the secondary education was 98%. Women's participation in the labour market has increased from 18% in 1992 to 31% in 2006. The vast majority (87%) of working women are concentrated in public services, particularly the education and health sectors. Women's participation in agriculture has decreased dramatically from 48% to 2% between 1973 and 2007, reflecting accelerated urbanization. However, 2/3 of the remaining agricultural labour force would be women.

Main changes since the crisis and perspectives

- Typically war situations entail a greater direct participation of men and a resulting shift of responsibilities onto women to provide for the rest of the family. However, the effects of the conflict on work and income may not differ significantly between men and women. Similarly as men, women who were working in public services before the conflict may be affected by delayed or suspension of salary payments, especially in opposition-controlled areas given the lack of budget of the National Transitional Council. Women (and men) engaged in other activities may not be able to work for security reasons or lack of complementary manpower (e.g. departure of migrants) or raw materials and inputs.
- Gender-based violence by armed forces is also common and would affect especially women from households believed to be sympathetic to the opposing party.

⁸ Well above Egypt at 71% and Tunisia at 74%. *Source:* The Economist Intelligence Unit. Libya Country Profile 2008 – UNESCO Statistics.

⁹ UNICEF: The Situation of Children and Women in Libya. November 2010.

¹⁰ UNICEF: The Situation of Children and Women in Libya. November 2010.

1.6 - Economy

Pre-crisis situation

Libya is considered an upper Middle Income Country. The economy is dominated by the hydrocarbons sector. Libya produces around 1.6 million barrels/day of oil, roughly equal to 2% of the global total.

The Gross Domestic Product (GDP) is mainly composed of industry output (share of 64% in 2010, including ¼ from oil), followed by services (33%) and agriculture (3%)¹¹. The share of both manufacturing and agriculture has fallen since the lifting of the sanctions which enabled a rapid expansion of the oil sector. GDP growth fluctuates according to the price of oil. The GDP grew by 3.3% in 2010, reflecting a 2.4% growth in the agricultural sector, 2.6% growth in the industry sector, and 4.6% growth in services. GDP per capita is estimated at US\$18,720¹².

The government has usually had a healthy budget surplus in recent years owing to high oil revenue and a tendency not to fulfil its spending commitments. The hydrocarbons sector provides 89% of government income and 95% of export earnings, and therefore pays the salaries of up to 70% of the local workforce given that some 70% of Libyans are employed by the state. Private enterprise has up to now been largely confined to retail.

The current account surplus is lower than the trade surplus because of the high outflow of migrant workers' remittances (despite administrative rulings restricting the amounts that can be transferred out of the country) and service payments to foreign companies.

The country's proven natural gas reserves have remained largely unexploited, although gas has been produced and exported in small quantities since the 1970s. The only other mineral resource of consequence is iron ore.

The construction sector is one of the country's fastest growing since 2005. The sector contributed to about 4% GDP and employed an estimated 600,000-800,000 people in 2008. The boom in construction was expected to continue for at least another decade. The country has very high quantity and quality level of the civil and productive infrastructure.

Tourism offered great development potential, but was underdeveloped as a result of the country's past diplomatic isolation and poor image as a tourist destination.

Regime holders control large swathes of the state-dominated economy. All foreign businesses were nationalised during the first 3 years of Colonel Qadhafi's rule, as well as all heavy industry, agricultural land, banks, insurance firms and services companies. Government's control has slowed progress on increasing private sector and foreign investor participation¹³. Foreign direct investment has been almost exclusively in the hydrocarbons sector.

However, there have been some privatisations and reforms:

- large public stakes in the banks have been sold;
- bank lending to the private sector has increased significantly since 2007; and
- new laws were introduced in 2010 to improve the business and investment environment (but were awaiting executive regulations when fighting broke out in mid-February 2011).

Diversification away from oil has been a common aim of economic policy and new investment programmes, but with little success, despite the government's efforts to promote foreign investment in areas such as infrastructure, telecommunications and tourism.

¹¹ CIA. Libya Profile. US Government. March 2011.

¹² The Economist Intelligence Unit. Libya Country Report, March 2011. Other sources mention lower figures, ranging from US\$13,500 to US\$16,700 per capita.

¹³ The Economist Intelligence Unit. Libya Country Report, March 2011.

Changes since the crisis and perspectives

- Libya is the first major oil exporter to have been shaken by the wave of unrest sweeping through the Middle East. This has been reflected in an upward spike in the price of crude oil to more than US\$116/barrel.
- Oil production has fallen by 1 million barrels per day, from 1.6 million early March 2011, according to the International Energy Agency¹⁴. About 2/3 of the output is produced in the region around the East Sirte Basin,. In light of the on-going unrest foreign companies have evacuated their employees and suspended operations. However, the Arabian Gulf Oil Company, which accounts for 25% of Libyan production capacity, has cut ties with the National Oil Corporation and is continuing to operate independently in the east of the country.
- About 2/3 of Libya's exported crude oil is loaded at five terminals in the east of the country. The oil and gas heartlands of the Sirte Basin could fall in rebel hands. In this case, oil production and exports could continue from both the pro- and anti-Qadhafi zones but at considerably reduced levels. They will not be able to regain former volumes until foreign oil workers return to the country. The only oil pipeline feeding the Tobruk crude oil refinery has been severely damaged by the Qadhafi forces. The Tobruk refinery is now running on crude oil stock, which is not being replenished. The entire eastern area relies on the depleting stock of oil products to run water desalination and power plants.
- Lower oil revenue and a freeze on the assets of the Qadhafi regime have already negatively affected liquidity. As of mid-March, the exchange rate had weakened to Libyan dinars LD2:US\$1 on the black market from the official 2010 average of LD1.3:US\$1, showing that foreign exchange is already in short supply.
- Freeze of banking assets and blockage of international transactions is impacting the upstream sourcing of imported food commodities, raw materials and inputs. Existing stocks are rapidly being depleted.
- The main economic prospects according to the Economist Intelligence Unit are summarized in Box 1.

Box 1 – Economic prospects for 2011

- Political uncertainty will remain high for the foreseeable future as pro- and anti-regime forces continue to fight for control of territory and become entrenched in a protracted civil war;
- Depending on war outcomes, the country could become fragmented along east-west lines, with the opposition controlling the east;
- Economic reform will remain halted if the Qadhafi regime stays in power, but if it is overthrown a new regime is likely to press ahead with reform and liberalisation;
- The economy is forecast to contract by 17% in 2011 as a result of a steep fall in oil production and exports; oil output is likely to rise quickly once the political situation stabilises; the main downfall will be in the industry sector (by 16%) and services (by 4.7%), while the agricultural sector may continue to grow by 1.9%;
- Falling oil output will result in a fiscal deficit of 25% of GDP in 2011; the effects of lower exports will be somewhat mitigated by higher oil prices on the back of widespread unrest in the Middle East;
- These forecasts are assuming that the political situation will be resolved later in 2011. Whether the Qadhafi regime or the opposition take control of Libya, oil production and exports would recover slowly, with GDP growth averaging 2.6% in 2011-2015;
- Government investment in infrastructure will decline in the immediate future as the regime focuses on strengthening its position by providing direct transfers to Libyans, while also spending heavily on arms and foreign mercenaries;
- Foreign direct investment will decline steeply in 2011-12 due to continuing political uncertainty;
- The outflow of migrant labour is likely to slow economic development.

Source: *The Economist Intelligence Unit. Libya Country Report. March 2011.*

¹⁴ Quoted in: The Economist Intelligence Unit. Libya Country Report, March 2011.

1.7 - Infrastructure

Pre-crisis situation

The quality and availability of infrastructure may be not perfect but it is adequate. The inter-agency mission reports a high quality/quantity level of infrastructure in the East. It is assumed that in the West of the country the infrastructure is even better. The network of about 25,000 km of tarmac roads is extensive and reliable. Most major towns and villages, including the desert oases, are accessible by car.

Energy generation and distribution is also reliable and sufficient to meet demand. The state-owned company (only power provider in the country) has begun a major investment programme in 2008 to expand power stations.

Changes since the crisis and perspectives

- Destruction of public infrastructure and probably some businesses has occurred and more can be expected if the conflict intensifies and spreads out.
- Temporary power cuts have been reported in conflict-affected cities and may be extended due to disruption of supply lines. This will further affect the productive capacity of companies which remain functional.
- Electricity cuts will also affect refrigeration at household and food retail outlet levels, with consequences on food conservation and safety.

II - FOOD PRODUCTION

2.1 Pre-crisis agricultural production

Agriculture employs around 6% of the workforce. The country imports about 80% of its consumption requirement. The main agricultural products imported by the Libyan Arab Jamahiriya are flour of wheat, oil of maize and milk that represented about 40% of all agricultural products imported. The main agricultural products exported are groundnuts that represented about 50% of all agricultural exports. The main indicators regarding the evolution of the agricultural sector performance since 1980 are given in the table below.

Agricultural sector — Average annual growth rates (percent)							
<i>Prepared by ESSGA, November 2006</i>							
	1980-1990	1990-2000	2000-2004		1980-1990	1990-2000	2000-2004
Population & Agricultural Labour Force				Agricultural Foreign Trade Indices			
Population	3.5	2.0	1.9	Import value	...	...	...
Rural population	- 0.8	- 1.1	- 0.6	Import quantity	...	...	...
Agricultural labour force	- 5.2	- 2.6	- 3.4	Export value	...	...	...
Agricultural Production - Major Items				Export quantity			
Indigenous chicken meat	9.7	5.7	0.3	Export value	...	...	...
Olives	- 10.4	12.2	1.8	Export quantity	...	...	...
Indigenous sheep meat	- 0.5	4.1	0.8				
Agricultural & Food Production Indices							
Agricultural production	1.2	3.7	2.1				
Agricultural production, per person	- 2.3	1.7	0.1	Food Supply			
Food production	1.2	3.8	2.1	Dietary Energy Supply, per person	- 0.6	0.1	0.1
Food production, per person	- 2.2	1.8	0.1	Dietary Energy Supply, total	2.9	2.1	2.1

Environmental constraints place a severe limit on Libya's agricultural potential. The country is over 90% desert, with most agriculturally productive land limited to a strip abutting the Mediterranean Sea. The two main areas of natural farmland are the high coastal plateau of Jebel Akhdar in the north-east and the fertile coastal plain in the north-west. Wheat and barley are the major cereals grown in the country. Other important crops include olives, grapes, dates, almonds and oranges. The country imports about 80 percent of its consumption requirement (Table 2). The livestock sector also relies heavily on subsidized imports of animal feed. Annual average inflation is estimated to have dropped to 2 percent in 2009, down from 10.4 percent in 2008, driven mainly by international commodities prices.

Total agricultural land is estimated at 15.4 million hectares composed primarily of pastures, which cover 13.3 million ha. The remaining 2.1 million ha consist of 1.8 million ha in arable land and 300,000 ha in permanent crops, primarily fruit trees. Water shortage is one of the most limiting factors affecting agricultural production in the country.

Area developed for irrigation is about 470 000 ha and only 240 000 ha are currently actually irrigated. Irrigation potential has been estimated at 750 000 ha. Its full development would have to rely mainly on the use of fossil water. It is estimated that there are currently about 170 000 farm-holders of which 39.4% are classified as full-time farmers. The rest are part-time farmers as they continue to rely on rainfed agriculture that does not provide sufficient returns. Close to 90% of all farms are considered small (less than 20 ha), compared to 9% medium sized (20-100 ha) and 1% large farms (greater than 100 ha).

Through the Great Man-made River (GMR) project launched in 1984, about 2 km³/year of fossil water is expected to be transported from the desert to the coastal areas for a period of about 50 years, mainly for irrigation. However, due to funding constraints, the plans for irrigation had to be scaled down massively and the priority has shifted towards providing drinking water to urban areas.

The main crop commodities produced in Libya are, wheat, watermelons, fresh vegetables and maize the varieties used are indicated in the table below. All these commodities were almost entirely used for local human consumption, except maize that was used as animal feed.

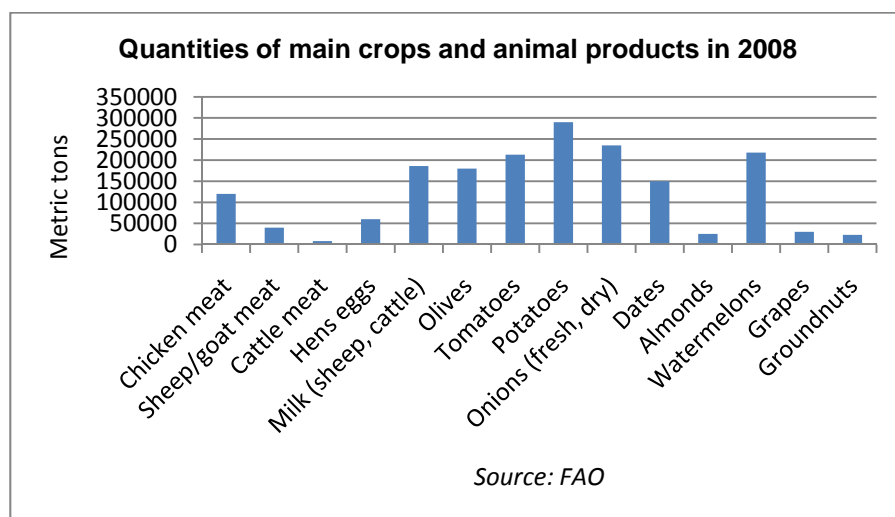
Table 2: The main crop commodities produced in Libya

Crop	Variety
Hard wheat	Karim
Soft Wheat	Salambo
Barley	Rihane
Maize	Pioneer Hybrids
Potato	Sponta
Carrot	Nantes - Chantenay
Onion	Texas Grano
Tomato	Rio Grande
Pepper	California Wonder
Cucumber	Beth Alpha
Eggplant	Black Beauty
Watermelon	Crimson Sweet
Muskmelon	Ananas

The share of agriculture in the economy has declined as the importance of oil rose. Including forestry and fishing, it represented about 2% of GDP in 2010. Agricultural sector growth has also decreased in recent years, from 9.8% in 2006 to 2.4% in 2010. The sector employed around 8% of the workforce in 2009 (down from 17% in the late 1990s)¹⁵. About 2/3 of the agricultural workforce were women in 2005-07.

The main crop productions (based on 2008 amounts) are potatoes, tomatoes, olive, watermelons, onions and dates. Smaller quantities of almonds, grapes and groundnuts are also produced. The main animal products are milk, chicken meat and eggs, and small ruminant meat.

Figure 1: Quantities of main crops and animal products in 2008



Libya has one of the highest population densities on arable land, with 300 inhabitants per km². Most of its arable and permanent pasture land is limited to the western strip of the coastal belt, which consists of about 75 percent of the population. The eastern strip also has significant food production. Irrigation water is vital in both areas.

¹⁵ IMF estimation 2009. Quoted in: UNICEF. The Situation of Children and Women in Libya. November 2010 – FAO statistics indicate a lower share of agricultural labour force, at 4% of total labour force in 2005-07, representing about 263,000 workers.

2.1.1 - Crop production

Agricultural output is constrained by a shortage of arable land and indigenous labour. These problems were compounded by the government's push for the development of large state-owned farms, characterised by low yields and production despite the agricultural technology provided to these structures.

Libya is over 90% desert, with most agriculturally productive land limited to a strip abutting the Mediterranean Sea. Only 5% of the territory receives more than 100 mm rain annually. Arable land amounts to about 2.2 million hectares and represents only 1.7% of the total country's area. There are some 14 million hectares of forest (217,000 hectares) and rangeland (13.3 million hectares)¹⁶.

Given the small arable area, plots are used to produce a number of commodities:

- in the partly wooded high coastal plateau of Jebel Akhdar in the north-east near Benghazi: crops include olives and grapes;
- in the fertile coastal Jifarah plain in the north-west near Tripoli: dates, olives, almonds and oranges are cultivated.

These 2 areas account for more than 80% of the country's agricultural production. Fruits and vegetables including potatoes constitute the bulk of the output, with only 20% comprised of barley and wheat. The food production per capita index in Libya is low at 133 - compared to a base 100 in 1999-2001 and to the world average of 233. Cereals production has been declining on a per capita basis since 2005 (index 95 compared to 78 in 2009 for cereals) while potato production has increased. FAO Food Balance Sheet figures indicate that Libya is self-sufficient in potatoes but produces only 16% of the wheat consumed in 2005-07.

More than 20% of the arable land is irrigated (470,000 hectares). Half of the cereal production and 90% of the fruit and vegetable production originate from irrigated land. Falling water tables caused by over-irrigation is creating a long-term ecological threat.

Even though water shortages are not yet a problem for individuals or businesses, it has been a long-standing concern. Launched in 1984, the Great Man-Made River (GMMR) project was designed to carry over 5 million m³ per day across the desert, and increase the area of arable land by around 150,000 hectares. However, Libyan officials have concluded that the project does not provide a total solution to the country's water needs and that more water sources will be required. There are plans to build 11 new desalination plants¹⁷.

According to the 2007 Pan Arab Population and Family Health Project (PAPFAM)¹⁸, 19% of households owned agricultural lands and 7% other lands. Only 4% had a tractor. Rapid urbanisation has led to a severe shortage of agricultural workers and heavy reliance on foreign farm labourers (migrants). However, the share of migrants engaged in crop or animal production activities is unknown.

2.1.2 - Animal production

Large numbers of poultry (24.8 million estimated in 2008), small ruminants (5.1 million sheep, 1.9 million goats) and cattle (210,000) are raised, supplying meat and dairy products. Only small amounts of meat and dry milk are imported.

Camels (about 71,000 estimated in 2008) are also kept for transportation and milk consumption, especially in desert areas.

The livestock sector relies heavily on subsidized imports of animal feed¹⁹.

¹⁶ CIHEAM. Food Self-sufficiency and Agricultural Research in Libya. T. Azzabi. 2000.

¹⁷ The Economist Intelligence Unit. Libya Country Profile 2008.

¹⁸ Quoted in: UNICEF. The Situation of Children and Women in Libya. November 2010.

¹⁹ FAO/GIEWS. North Africa Brief. March 2011.

2.1.3 - Fisheries

Despite 1,770 km of coast and a potential for growth, fishing activities are limited with most of the fish products consumed domestically. The sector employs a very low portion of the labour force (1%) and contributes to a low share of the agricultural GDP (estimated at 9% in 2003). In 2001, per capita fish supply was low at only 7 kg per year²⁰.

2.1.4 - Findings of the Rapid Assessment in Eastern Libya - April 2011

Rainfall in this 2010-11 winter season is reportedly good. Moving from the Egyptian border to Tobruk, the landscape is very flat with scattered barley fields and tiny fig tree plantations, apparently with no irrigation as the water table is allegedly very deep (approx. 300mt). Soil and water conservation works are well spread over the area but visibly damaged by floods (breaches on several bounds). Moving from Tobruk to Benghazi (East to West), across the 'Green Mountains', there is a visible gradient of increasing rainfall, water availability and agricultural activities. Particularly, the plateau between Al Bayda and Al Marj (approx. 100 km by 20-30 km) is covered with large barley fields and wind break tree lines with Cupressus. Several stone fruit tree plantations of small and medium size are present. Sheep/goat flocks are relatively large (approx. 50 – 70 heads). Many cows and poultry farms are also observed. Agriculture infrastructure, machinery and service centres are present across the area.

From Al Marj to Benghazi (coastal plain) the landscape is drier with barley fields and grazing areas. No irrigation infrastructure is visible and many water tank trailers are used to distribute water. Allegedly, Libyan land owners use Palestinian and Egyptian share-croppers for crop and animal production. In eastern Libya, artisanal fisheries are the most important source for the local market, which is quite limited. Many medium size fishing boats (approx. 12 meters long) have been lifted on the docks as migrant manpower, mainly Egyptians, fled the country.

A more in depth assessment of agriculture activities is urgently required to identify potential interventions – e.g. drip irrigation, diversification of forage crops, recovery of artisanal fisheries, support to animal production and animal health services.

2.2 - Changes in agricultural production since the crisis and perspectives

- In the opposition areas close to Benghazi, olive and grape crops are produced in the Jebel Akhdar plateau in the north-east near Benghazi. Good barley harvest is expected this year as rainfall was adequate.
- The massive departure of foreign workers will affect manpower for agricultural activities and possibly contribute to reduced domestic food supplies if labour shortages occur during key periods such as harvesting (this season) and planting (next season). Wheat should be harvested in June.
- Lack of inputs due to interruption of supply channels (insecurity, closure of businesses) will also constrain cultivation.
- Suspension of access to subsidized animal feed, especially in opposition-controlled areas where the National Transitional Council lacks sufficient revenues to pursue the subsidies, may hamper animal production and lead to animal sales. This issue must be addressed as a matter of urgency.
- Disruption to agricultural input import (including seeds, livestock, feed and veterinary supplies) would impact agricultural production, food security and income-generation in the short and medium terms.

²⁰ FAO. Libya Fishery and Aquaculture Country Profile. 2003.

III - FOOD IMPORTS, MARKET SUPPLY AND PRICES

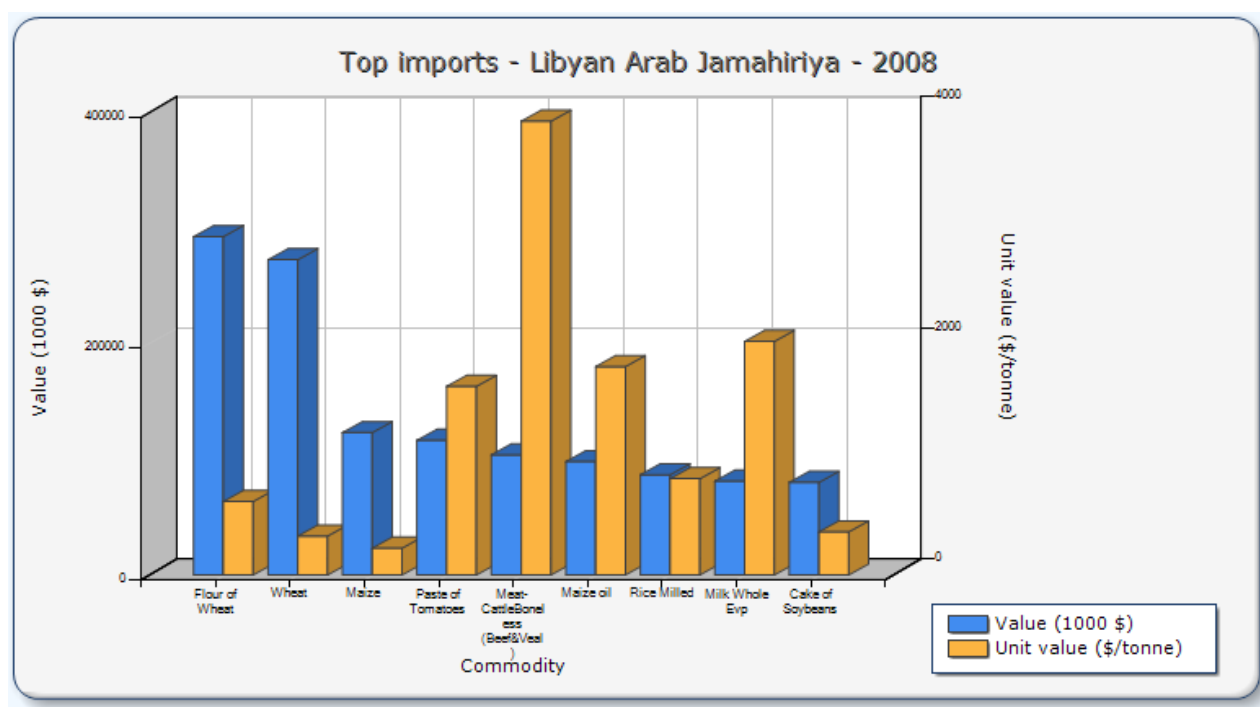
3.1 Pre-crisis food trade and markets

3.1.1 – Food imports and exports

Owing to its limited agricultural potential, Libya imports 75%-80% of its food consumption requirements. The ratio of exports to food imports, which measures the ability of the country to finance its food imports out of total export revenues is quite low in Libya (11.1, similar to Tunisia but higher than Egypt at 6.9). Libya is also considered to be at risk of shortage of imported food due to export bans and other export restrictions, as well as international banking transactions that prevent any imports, even if there are sufficient funds to purchase it, owing to its high dependence on cereal imports despite strong fiscal balance²¹.

Available statistics from 2008 indicate that wheat and maize are the main imported cereals. In 2005-07, 84% of the wheat flour consumed was imported, compared to 74% in 1990-92, reflecting the different levels of wheat production and population growth. In value terms, meat and dairy products contribute a significant share of the import bill. Food imports represented 16% of total import costs in 2005-07.

Figure 2: Top Imports



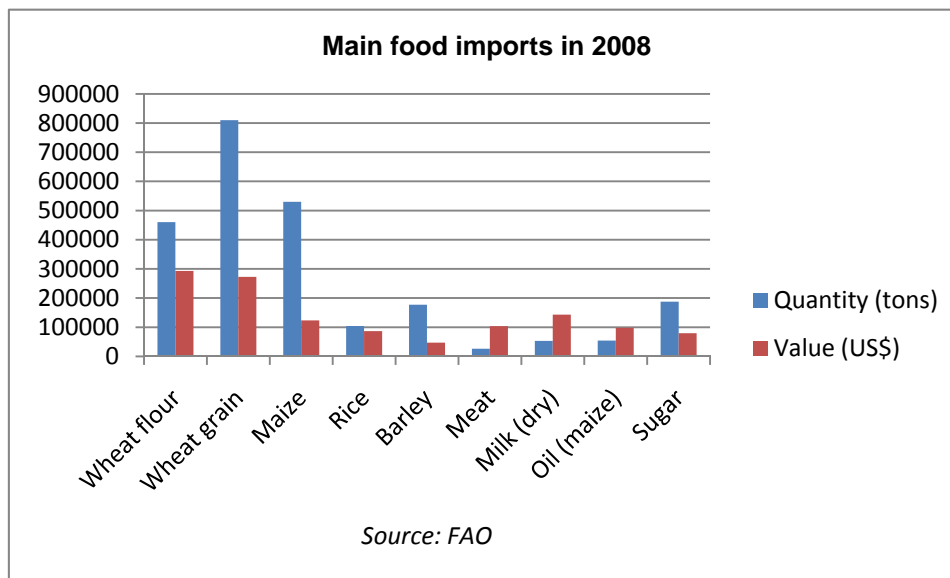
²¹ FAO. Food Security in the Middle East and North Africa region. GIEWS. 3 March 2011.

Table 3: Main Commodity

Rank	Commodity	Quantity (tonnes)	Flag	Value (1000 \$)	Flag	Unit (\$/tonne)	value
1	Flour of Wheat	460551	R	292705	R	636	
2	Wheat	809962	R	272727	R	337	
3	Maize	530008	R	123182	R	232	
4	Paste of Tomatoes	71372	R	116488	R	1632	
5	Meat-CattleBoneless(Beef&Veal)	26483	R	103934	R	3925	
6	Maize oil	54405	R	98075	R	1803	
7	Rice Milled	104049	R	86689	R	833	
8	Milk Whole Evp	40178	R	81157	R	2020	
9	Cake of Soybeans	214666	R	80093	R	373	
10	Sugar Refined	187593	R	79772	R	425	
11	Cheese of Whole Cow Milk	14179	R	70377	R	4963	
12	Fat Prep Nes	34487	R	68139	R	1976	
13	Milk Whole Dried	13024	R	62254	R	4780	
14	Pastry	24122	R	53808	R	2231	
15	Chocolate Prsnes	11749	R	48114	R	4095	
16	Barley	177131	R	47279	R	267	
17	Hen eggs, in shell	11977	R	43383	R	3622	
18	Food Prep Nes	15226	R	37998	R	2496	
19	Apples	28423	R	35433	R	1247	
20	Macaroni	25528	R	29542	R	1157	

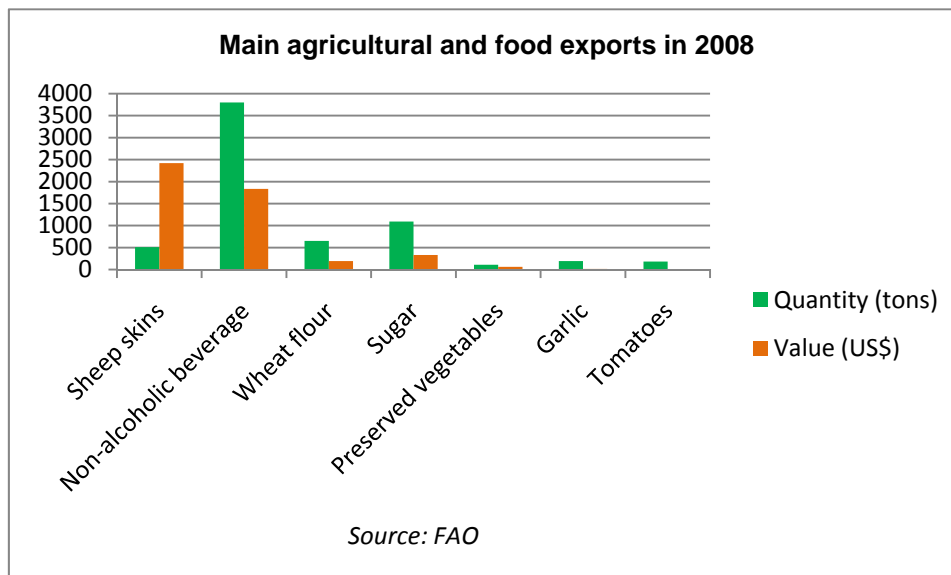
R : Estimated data using trading partners database

Figure 3: Main Food Imports 2008



The volume and earnings from agricultural and food exports are minimal in contrast, and consist essentially in animal skins and non-alcoholic beverages.

Figure 4: Main Agricultural and Food Exports in 2008



3.1.2 - Public food distribution system

In eastern Libya, the Price Stabilization Fund (PSF) has replaced the National Supply Company (NASCO) as responsible for the public distribution system, including the supply/import and dispatch to selling points of staple food including mainly cereals grains and flour (wheat, rice). A wider range of “first necessity products” used to be covered including also sugar, oil and vegetables, but the list has been reduced in recent years²². PSF (ex-NASCO) buys food and processed commodities from private companies and dispatches it to a wide distribution network of cooperatives, retail outlets (including bakeries) and larger centres for sale at subsidized price. The Government pays the difference between market price and the subsidized price. Each Libyan family has a family booklet that enables it to purchase commodity rations at subsidized prices in the cooperative or retail outlets where they are registered.

PSF also cooperates with the Endowment and Zakat Affairs government unit, which verifies and registers people living below the poverty line, with a focus on widows, the disabled and orphans. Commodities are provided at no-cost to these groups through mosques in the various neighbourhoods. The number of such people is unknown.

3.1.3 - Food prices

Inflation is difficult to measure owing to the lack of reliable data on domestic price changes. Consumer prices are estimated to have fallen down in 2009 from their peak (about 10% inflation) in 2007-08, but rose again in 2010, reflecting the increase of grain prices on international export markets.

The rise on international markets was steep between June 2010 and early 2011²³, increasing the cost of imported wheat, rice, maize and other grains. Wheat is a major staple in Libya and most of the wheat consumed is imported.

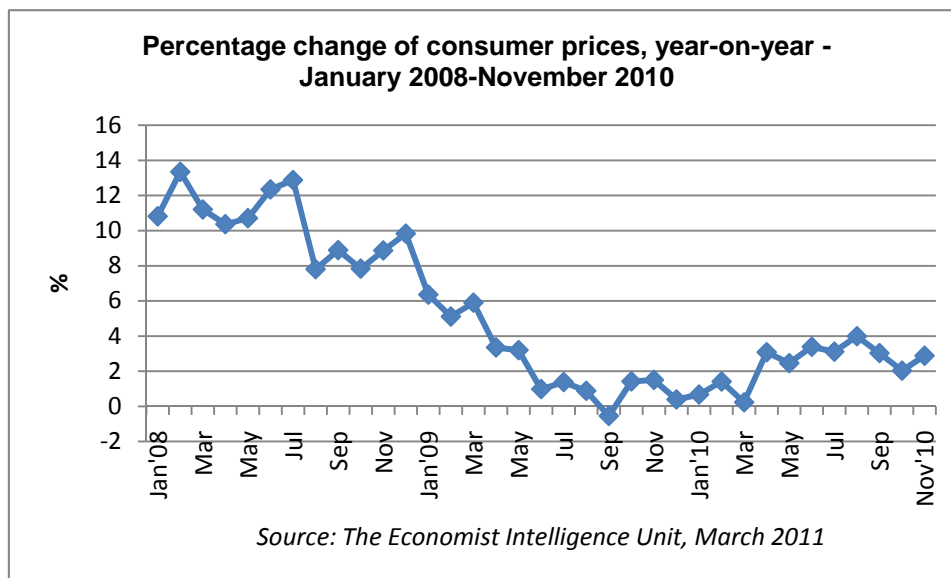
²² WFP North Africa Crisis Brief, 8 March 2011.

²³ The reasons for the international cereal grain price hike are similar in nature to those of 2008, although the base situation (e.g. production levels, stocks) is different. Some of the key reasons for the price rise in 2010-11 include: wildfires and drought in Russia, supplier of over 10% of world wheat exports, which led the Russian government to ban wheat exports in August 2010; floods in Australia; dry weather in Argentina and the United States and a variety of other weather anomalies that caused extensive damages to grain crops; strong demand for agricultural commodities in emerging economies; and higher oil prices which have led to an increase in the use of maize for ethanol production, in particular in the US. Source: FEWSNET. Executive Brief: Food Price Trends in the Middle East and North Africa. USAID. March 11, 2011.

The price on international markets of other imported commodities, including sugar²⁴ and edible oils, also rose dramatically. Inflation trends suggest that the rise has been passed through to consumer prices²⁵. Higher international maize prices are also passed through to consumers indirectly by raising animal feed prices, meat prices, and the price of many processed commodities²⁶.

The Libya Consumer Price Index rose by 2.9% between January and November 2010. For the whole year, inflation is estimated at 2.5%.

Figure 5: Change of Consumer Price 2008-2010



In response to the food prices rise, the Libyan government announced a lift of taxes and custom duties on both locally-produced and imported food items (wheat, sugar, vegetable oil) in January 2011. The rise of food prices on domestic prices is affecting those outside of the national subsidy programme (see paragraph 4.2.1), particularly the migrants.

3.2 – Food market and price changes since the crisis and perspectives

- Inflation is forecast to rise to an average of at least 6.8% in 2011, based on the assumption of significant food shortages owing to the on-going conflict. Food import prices will also increase due to higher international food and non-oil commodity prices. Inflation may be mitigated by a shortage of local and foreign currency however.
- However government subsidies may be maintained despite the crisis, which should mitigate the rise of staple food prices (and access to healthcare)²⁷.
- Food stocks are rapidly being depleted in the absence of any replenishment pipeline. Shortage of food is currently localized and limited but may quickly escalate to large scale unavailability in conflict-affected areas.
- In Government-controlled towns and areas, the level of food stocks is unknown, hence the self-sufficiency capacity and ability to replenish shops and markets are uncertain. However, PSF and the Endowment and Zakat Affairs Unit should continue to operate in these areas. Food provided by PSF

²⁴ The rise in the price of sugar is mostly due to a production shortfall in Brazil, and weather shocks in Australia. Edible oil prices increase are also related to weather shocks, including in Brazil and Argentina which account for approximately 45% of soybean exports, and floods in Malaysia and Indonesia which have hindered palm oil harvests.

²⁵ FEWSNET. Executive Brief: Food Price Trends in the Middle East and North Africa. USAID. March 11,2011.

²⁶ The World Bank. Food Price Watch. February 2011.

²⁷ The Economist Intelligence Unit. Libya Country Report, March 2011.

should be replenished normally, although supply to opposition cities in the west (Misrata, Azzawiyah, Al Khums) may not be ensured²⁸.

- Food shortages have been reported in conflict-affected cities and surroundings, in both eastern and western Libya, due to the interruption of movement of food towards selling locations. Insecurity is also likely to restrict movements of people to cooperatives and retail outlets to buy food and other necessities (e.g. water, cooking fuel). Shortage of food will lead to price increases, as even the subsidized commodities distributed through NASCO will become exhausted in opposition-controlled cities and surroundings. By mid-April, food price rise of 30-40% were reported²⁹.
- In Benghazi and the east, the Transitional National Council is planning the establishment of a dedicated committee to provide food commodities to the 2.6 million Libyan residents, which will include PSF, the Endowment and Zakat Affairs Unit and the Libyan Red Crescent. At present, food provided by PSF is not being replenished. By mid-April, wheat flour stocks were estimated to cover about 1.5-2 months of consumption³⁰.
- Food processing businesses – such as bakeries – relying on foreign workers and lacking raw inputs are scaling down their operation and some are forced to close³¹.
- Since mid-March, relief food aid from WFP and ICRC is being distributed through the Libyan Red Crescent in some of the conflict-affected locations.

²⁸ WFP. North Africa Crisis Brief. 8 March 2011.

²⁹ Humanitarian Needs Assessment Mission to Libya- WFP/FAO food security inputs. 7-12 April 2011.

³⁰ Humanitarian Needs Assessment Mission to Libya- WFP/FAO food security inputs. 7-12 April 2011 - WFP. Update on the Food System in Libya. 14 March 2011. UN Inter-agency assessment to Benghazi, 1-6 March 2011.

³¹ ACAPS. Libya Secondary Data Review. 21 February-3 March 2011.

IV - HOUSEHOLD ECONOMIC ACCESS TO FOOD

In a situation of the vast majority of the food consumed by households come from market purchases, economic access to food is determined by (i) income levels and access to other transfers in cash or in kind, and (ii) market prices (described in section 3.1.3 above). According to FAO Food Balance Sheet data, food expenditures represented 37% of total expenditures in 2005-07 (the source of information is unavailable).

4.1 - Household income levels and sources

4.1.1 - Pre-crisis poverty

The standard of living of ordinary Libyans is one of the highest in the region, with revenues from the hydrocarbons sector being used by the government to subsidise basic foodstuffs, education, health and housing. Sustained high oil prices and the lifting of sanctions have given income per head a substantial boost.

According to official statistics, no households lived below the extreme poverty line (LD336 per person per year, roughly equivalent to US\$0.7 per person per day) in 2008. However, in 2002-03 an estimated 13% of the population lived below the absolute poverty line with an income of less than LD418 per month (about US\$0.9 per person per day)³². This is less than the 20% estimated to live in poverty in 1992.

The 2007 Pan Arab Population and Family Health Project (PAPFAM) survey indicated that the majority of households owned television (96%), more than 90% had satellite dish, oven, refrigerator and more than 80% had water heater and washing machine. About ¾ had mobile phones and 62% a private car.

No poverty reduction strategy is in place to support poor households to enter the job market and income generating activities. Despite the official statistics, a number of social safety nets are in place to cater for the poor and other vulnerable groups (disabled, elderly, homeless, divorced, etc.). In the Benghazi area only, with a population of approximately 150,000 families, the Department of Social Affairs operates the following schemes:

- - Basic salary (approx. USD 100 per family per month) with a caseload of approximately 20,000 families;
- - Unemployed scheme, with a total budget of LD 7.5 million and a caseload of approximately 24,000 families,

In addition, the Mosque Zakhat network supports approximately 17,000 families. Further investigation is required to ascertain the targeting criteria and to estimate the inclusion/exclusion error margins of these schemes.

4.1.2 - Pre-crisis income sources

Unemployment is high – estimated to be at least 30% - particularly among the youth (about 40%)³³. The labour market is constrained by its focus on oil and related activities, rather than industrial and trade added value. Nevertheless, like many oil-rich countries, a substantial number of foreign workers (2-2.5 million) are imported for both skilled jobs in the oil industry and basic manual labour that the local population is unwilling, or unable to do. The Government imposed quotas on foreign companies requiring 30% of their staff to be Libyan, but the lack of appropriate skills (language, technical knowledge) often excludes Libyans, including the young, from this opportunity. Only 3% of the local workforce is employed in the oil sector.

In 2006, an estimated 31% of the labour force were female.

³² General Information Authority (GIA)/UNDP 2008. *Quoted in*: UNICEF. The Situation of Children and Women in Libya. November 2010.

³³ The Economist Intelligence Unit. Libya Country Profile 2008. Other data give a lower unemployment rate, at 8% between 1990 and 2005. *Source*: UNICEF. The Situation of Children and Women in Libya. November 2010.

About 16% of households would not have a stable source of income, while 44% would have one source and 26% two sources³⁴.

Estimates indicate that the government employed up to 70% of all salaried Libyans, mostly in the education and health services, and public administration. However, salaries in government services are low and working conditions often poor, combined with a lack of transparency and career development opportunities.

Growth in the private sector and in foreign investment was expected to create some new jobs. However, given the high population growth and dependency of the economy on the capital-intensive oil sector, unemployment is unlikely to fall quickly³⁵.

Figure 6: Labour Force Employment- share by Sector 2001-2007



Prior to the crisis, the government was considering firing 1/3 of the public sector workforce – about 340,000 workers, particularly in the healthcare, education and oil industry sectors - in order to help the development of the private sector and curb the government's huge wage bill. This was not (yet) done, probably due to the existing level of unemployment and the socio-political consequences.

4.1.3 – Pre-crisis situation of migrants

Most foreign workers are engaged in hard and marginal jobs such as waste disposal, cleaning, handling and construction. Most of them are employed in the service sector. They are also very present in the agricultural and livestock sector. However, more precise figures on migrant occupations are not available.

A survey undertaken among 300 migrants (mainly from Sub-Saharan countries and Bangladesh) who crossed the border into Tunisia mid-March 2011 indicated that about half had worked in construction, 14% in factories, 9% as domestic workers, 8% in hotels/restaurants, 8% in transportation, and 5% owned their own business. The average salary earned was LD400 (about US\$330) per month³⁶. While this amount is not

³⁴ ACAPS. Libya Secondary Data Review. 21 February-3 March 2011.

³⁵ The Economist Intelligence Unit. Libya Country Profile 2008.

³⁶ OCHA. Initial Assessment of Migrant Workers from Libya in Tunisia. Tunisian Border, Choucha Camp. 18 March 2011.

insignificant, the portion sent back home is unknown however, and the migrant and any family member who travelled with him may be left with much less for their living in Libya. A number of interviewed migrants indicated that they received food also from their employers, and the majority reported being denied food by shop-keepers in Libya (it is not clear however, whether this refers to subsidized food only or more generally).

Illegal migration has increased, with migrants from Sub-Saharan Africa crossing the 4000 km-long border at non-official entry points, located in full desert. The city of Benghazi hosts a large number of migrants, as well as Tripoli and other coastal towns. Immigrants have been blamed for threatening the local fabric of Libya and for a variety of social problems, such as crime, prostitution and drugs.

In February 2004, the government approved laws to further restrict immigration and to expatriate Africans and other migrants who lived in Libya but had no steady jobs. Proper identity papers were now required of every migrant worker³⁷. In addition, foreign workers were required to obtain a health certificate, showing that they had successfully passed a series of health tests, including one for HIV. The certificate must be renewed every 6 months for restaurant workers and every year for other workers. However, the health tests are available only to legal immigrants (with identity papers), and those who can pay the fee of LD70 (about US\$50).

An example of the role of migration to Libya is provided in Box 2 based on a study of migrants from Darfur, Sudan, in 2007.

Box 2 – Darfur migrants to Libya, 2007

A study of migrants from Darfur, Sudan, was undertaken in the city of Benghazi and oases of Kufra, in south-east Libya, which are important transit hubs for Sudanese immigrants.

As an immediate neighbour, Libya was an attractive destination for Darfurians during the opening period for migration in the 1970s and 1980s. The 1993-94 period was also associated with a “rush” of Sudanese migrants.

The study indicated that only about 1/3 of Sudanese immigrants in Benghazi and Kufra oases have legal papers and health certificates. Migrants work in Kufra in both unskilled and skilled occupations, including:

- unskilled labour in Kufra’s large agricultural project (mechanized and irrigated farm) or on private farms, construction sites, loading trucks etc.;
- skilled labour for government services (e.g. health), technicians, artisans (e.g. self-employed tailors), restaurant owners, trans-border truck drivers, camel caravan guides, traders and middlemen.

A variety of Sudanese migrant merchants specialise in particular trades, including livestock (camels and sheep), goods (household items and food), vehicle spare parts, and agricultural seeds. The livestock trade is a major employer and source of livelihood for Darfurians in Kufra, including livestock traders, herders and drovers, guides and lead herders.

Source: International Migration Review (IMR). Darfurian Livelihoods and Libya: Trade, Migration, and Remittance Flows in Times of Conflict and Crisis. H. Young, A. Oman, R. Dale. Volume 4, winter 2007.

4.1.4 – Poverty and income changes since the crisis and perspectives

- Payment of salaries of civil servants loyal to Colonel Qadhafi has apparently been delayed (unconfirmed). For households relying on one breadwinner and/or low-paid occupations prior to the crisis and who could not accumulate cash savings, the combination of reduced income with rising food prices due to impending shortages, is likely to severely hamper their access to food.
- There are serious concerns over the jobs of the vast Libyan labour force employed by the state (70%), particularly given that many of them are sinecures.
- The Transitional National Council in opposition-controlled areas is lacking funds to pay civil servants. Only partial advances are received by banks. This will decrease many households’ income.
- Agricultural producers may benefit from rising food prices due to impending or actual food shortages in shops and markets (although these benefits may accrue more to traders than to producers). However,

³⁷ According to the survey among migrants fleeing to Tunisia mid-March, most of those from Sub-Saharan Africa did not have valid visa to work in Libya. They entered with a 3-month visa and remained to seek employment opportunities. *Source: OCHA. Initial Assessment of Migrant Workers from Libya in Tunisia. Tunisian Border, Choucha Camp. 18 March 2011.*

they will be affected by: (i) the departure of migrant labourers, which will limit their capacity to harvest and plant for the next season, and (ii) declining households' purchasing capacity and demand.

- Similarly, traders may gain from the higher selling prices, but lose from decreased demand. However, they may have sufficient pre-crisis savings and easy access to transportation enabling them to move out of conflict-affected areas and protect their own access to food. Traders in eastern Libya show high social responsibility, not withholding or inflating prices of existing stocks. However, they are forced to pass the increased prices of imported commodities onto their customers. Such trend is of extreme concern, against the background of crippling social safety nets and subsidy schemes. Although the supply chain from Egypt is open – albeit more expensive – many traders indicated a reluctance to import these goods, as they are aware that household purchasing power has decreased.

4.2 - Food assistance programmes

4.2.1 - Government social protection and food subsidy system

The Libyan government has an extensive social protection and price subsidy system in place (which was used in the past to negate the need for salary rises). It includes subsidized food staples, housing and energy, while health and education services are free of charge. All staple food items are subsidized though mostly wheat and rice were supplied at subsidized prices in recent years.

In 2009, the government reported to have raised its allocations to LD8,544 per household per year (equivalent to about US\$2.5/person/day³⁸) from the previous LD4,212 (US\$1.2/person/day)³⁹. In response to the increase of food prices end 2010, an additional LD600 (US\$450) was provided to every family and a 150% salary increase to public sector workers.

The proportion of the government budget devoted to subsidies is significant, at about 5% of budget expenditures between 2000 and 2005. The amount of government spending on subsidies and transfers has risen rapidly since 2005 and was projected to increase 5-fold by 2010⁴⁰. The impact of subsidies on food and livelihoods is hard to measure due to lack of data and transparency in the system.

The Wealth Distribution Programme (WDP) was devised in 2008 with the aim of distributing oil revenues through a citizen's fund, in order to: (i) help meet their basic needs, and (ii) provide special allowances to poor families of at least 3 members without any income or a monthly income less than LD200 (US\$150) in 2010. These families, as well as persons who receive basic pension allocations, would also benefit from a portfolio programme that generates annual dividends, and they are entitled to advances to cover housing, health care, food, vocational education and training, transportation and other such expenses.

The Economic and Social Development Fund (ESDF) was also established in 2006 to alleviate poverty among those in the lowest income bracket, as well as diversify the economy and create sustainable economic growth. The ESDF is mandated to invest earmarked funds in various private sector projects (about 65% of funds) and social sector services projects (about 32%). Revenues generated by the investments are then distributed to Libyans within the lowest income bracket⁴¹.

The extent to which the WDP was effectively implemented, its coverage and the scale of the transfers, are unclear however. Similarly, information on the number of actual beneficiaries of the ESDF and size of transfers is unavailable. However, a large portion of these various subsidies is believed to be captured by the better off, as the subsidy mechanism has become an inclusive tool of wealth distribution, not limited to the most vulnerable.

Migrants are not entitled to subsidized food and have to pay full market prices.

³⁸ Assuming an average family size of 7members.

³⁹ UNICEF. The Situation of Children and Women in Libya. November 2010.

⁴⁰ IMF 2009. Quoted in: UNICEF. The Situation of Children and Women in Libya. November 2010.

⁴¹ Economic and Social Development Fund 2010. Quoted in: UNICEF. The Situation of Children and Women in Libya. November 2010.

4.2.2 - Non-governmental organizations and Libyan Red Crescent

The civil society and non-governmental organizations (NGOs) are still limited, and information on their activities is not available. The Libyan Red Crescent has a long history of supporting healthcare, providing blood transfusion services, and supporting humanitarian emergencies. Two NGOs are also mentioned as particularly active within Libya (and in Africa and Asia)⁴²:

- Qadhafi International Charity and Development Foundation (GICDF), led by Colonel Qaddafi's son; and
- Waatasimou Charity Association, led by Colonel Qaddafi's daughter.

The GICDF has created some affiliated branches to work on human rights protection and the development of civil society institutions to support vulnerable groups, particularly the poor, orphans, the disabled, victims of land mines, and drug addictions. It also has a branch in charge of humanitarian assistance in emergency situations worldwide.

Civil society organizations and NGOs are mushrooming in eastern Libya. While the formal registration process is still unclear, this signals a high level of social mobilization.

4.2.3 - Food assistance changes since the crisis and perspectives

- The Transitional National Council in opposition-controlled areas is lacking funds to continue the food subsidy system. This will prevent food prices to remain stable (in view of the rising international prices and pass-through to domestic markets), at the same time as households' income are decreasing (for delayed-lack of salary payment and depressed economic activities due to departure of migrants inter alia).
- In Benghazi, the Libyan Committee for Humanitarian Aid and Relief (LCHAR) of the opposition's Libyan Transitional Council, in collaboration with local religious authorities and the Scouts has been collecting data on local families and IDPs who need assistance. LCHAR and the Libyan Association for Humanitarian Relief have been distributing food to residents and IDPs in Benghazi and surroundings.
- The Libyan Red Crescent has also been active in supporting relief operations, including food distributions, in the conflict-affected areas.

⁴² UNICEF. The Situation of Children and Women in Libya. November 2010.

V - HOUSEHOLD FOOD CONSUMPTION AND UTILIZATION

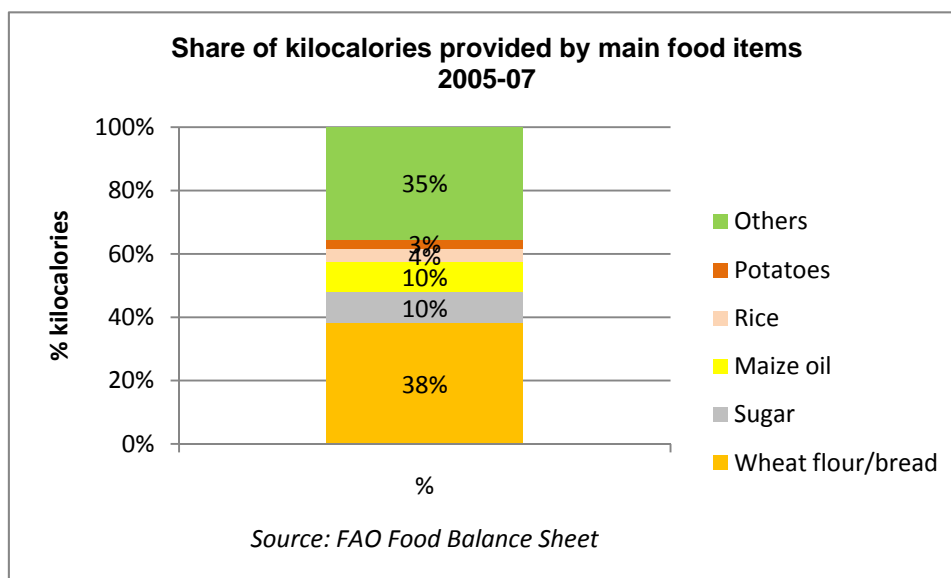
Food utilization, manifested in the nutritional status, is influenced by the quality of food consumed, the health status and care practices. These, in turn, reflect household food access as well as broader public health services, water, sanitation, housing, education and socio-cultural factors.

5.1 - Food consumption patterns

Based on FAO Food Balance Sheet calculations, the average dietary energy supply was 3140 kilocalories per person per day in 2005-07. The share of cereals was high (63% total calories), while the shares of proteins (10%) and fat (27%) were relatively low. These various figures have been relatively stable since the 1990s, possibly reflecting the fact that the population had already reached an income level after which the quality of food consumed improves as income continues to rise, but the amounts or type of food consumed do not vary significantly.

Food items providing the largest amounts of kilocalories in the diet are wheat (mostly in the form of bread), sugar, maize oil, rice and potatoes. The apparent consumption of potatoes and maize oil has risen since 1990-92 while the consumption of sugar has slightly fallen.

Figure 7: Share of Kilocalories Provided by Main Food Items 2005-2007



5.2 - Nutritional status

Pre-crisis situation

UNICEF statistics report 4% underweight children below 5 years of age, 4% wasting and 21% stunting over the period 2003-09. FAO data indicate 22% overweight among under-5 children in 2007 but the source of this figure is not provided.

No information is available on micronutrient deficiencies. The majority of households consume iodized salt.

Changes since the crisis and perspectives

- Severe food shortages can quickly affect the nutritional status of vulnerable individuals, particularly under-5 children, and pregnant and lactating women. Wasting rates can rise as a result of decreased amount and variety of food consumed, and deterioration of health due to interruptions of water supply

(see below). If the situation is prolonged, effects on the growth of children below 2 years of age will result in increased stunting rates later on, with life-long effects on learning capacities and future livelihoods.

5.3 - Child feeding practices

The 2007 PAPFAM survey showed that most under-5 children (94%) were breastfed for some period of time. However, about 40% received pre-lacteal feeding, increasing the risk of infections.

5.4 - Health

Pre-crisis situation

Health care is provided free of charge and, together with the extensive social assistance programme of the government, is believed to have contributed to the decline of deaths in infants and under-5 children since 1990. Under-5 child mortality fell from 34 deaths per 1,000 live births in the 1980s to 19 deaths in 2009. Infant mortality decreased from 29 deaths per 1,000 live births to 17 deaths during the same period. Under-5 child mortality has declined more quickly than infant mortality. The main causes of under-5 mortality are prematurity (30%) and congenital anomalies (22%). Data presented for the Millennium Development Goal (MDG) 2008 report did not indicate disparities across geographical areas, between wealth quintiles, or by mother's education.

There also appears to be little correlation between the number of children and the education attainment or geographic residence of the mother. According to the 2007 PAPFAM, on average 3.9 children were born among women aged 15-49 years. UNICEF 2009 and World Bank statistics report a lower number of 2.6 children per woman.

PAPFAM results also indicated that only 79% of children 12-23 months were immunized against all preventable diseases, but 95% of children 12-59 months were fully immunized. Immunization coverage was closely related to mother's educational level.

Around 13% of under-5 children were reported to have been ill with diarrhoea, and an additional 6% with diarrhoea with fever, during the 2 weeks prior to the PAPFAM survey. These rates may be linked to the declining access to safe water (see paragraph 5.5).

According to WHO, 90% of the urban population and 82% of the rural population has access to health care. Migrants however are not granted access and free healthcare⁴³.

The improvement of primary health care facilities has expanded access to antenatal and postnatal care for pregnant women. The vast majority of births are delivered in public hospitals, contributing to a reduction of maternal deaths over the past 15 years, from 77 deaths per 100,000 live births in 1992 to 27 deaths in 2007. However, the number of maternal deaths is still higher than in other oil-producing countries in the region⁴⁴.

Accurate information about HIV and AIDS is limited. Prevalence among adults is reported to be low, at less than 0.2%. However, a concentrate epidemic is being experienced among at-risk groups, mainly injection drug-users. Libya's geographic location next to countries with high HIV and AIDS rates, the growing number of young migrants from these countries, and its large proportion of young people, are some of the main risk factors for the possible growth and persistence of the epidemic⁴⁵.

Many Libyans travel to Tunisia, Egypt and other countries to receive health care.

⁴³ Tunisian migrants fleeing the conflict in March reported that they were denied access to health services altogether. Source: OCHA. Initial Assessment of Migrant Workers from Libya in Tunisia. Tunisian Border, Choucha Camp. 18 March 2011.

⁴⁴ UNICEF. The Situation of Children and Women in Libya. November 2010.

⁴⁵ Libyan Arab Jamahiriya UNGASS Country Progress Report 2010. Quoted in: UNICEF. The Situation of Children and Women in Libya. November 2010.

Changes since the crisis and perspectives

- Destruction of health facilities, attacks on and departure of health workers, and disruption of drug supplies have been reported in conflict-affected areas, and will affect access to health care for both directly affected individuals (e.g. war-wounded) and chronically sick individuals.
- Many clinics in eastern Libya relied on foreign doctors, who have now fled the crisis. As a result, there is a lack of doctors and specialized healthcare in many health facilities.
- In government-controlled areas, free access to healthcare should continue unimpaired but interruptions of drug supply routes and departure of health agents due to insecurity are not excluded.
- Health centres in Tunisia are already severely affected by declining number of Libyan health service seekers.

5.5 - Water

Pre-crisis situation

Water scarcity is on the rise. As indicated before (see paragraph 2.1.1), the GMMR project and other initiatives were launched to expand the water supply.

The 2007 PAPFAM survey showed a decline in the proportion of households relying on public taps as the main source of drinking water (from 58% in 2003 to 44% in 2007), probably owing to increased water pollution. There was a corresponding increase in the uptake of wells/boreholes and bottled water as main sources of drinking water. Overall, access to safe water had deteriorated: 41% in 2007 compared to 91% in 1995⁴⁶. However, according to UNDP statistics, 71% of the population would have regular access to safe water in 2009.

Changes since the crisis and perspectives

- Water supply has been cut-off from cities attacked in the east.
- in case of major disruption in the desalination plants' operation, use of contaminated water will increase risk of water-borne diseases such as diarrhoea. Water shortages will also impair hygiene and proper cooking of food, potentially source of food-borne diseases. These health problems will negatively affect the nutritional status of individuals, particularly the most vulnerable.

5.6 - Sanitation

Pre-crisis situation

While almost all families use some type of sanitation facility, its quality differs. According to the 2007 PAPFAM, only 63% of households are connected to a waste liquid disposal network, and 40% are using septic tanks. Less than half of the households (46%) benefited from solid waste collection, which employed migrant labour force.

Changes since the crisis and perspectives

- Destruction of sanitation facilities in conflict-affected areas will compound pre-crisis problems with waste disposal and increase risks of infectious diseases.

⁴⁶ General Information Authority (GIA)/UNDP. *Quoted in*: UNICEF. The Situation of Children and Women in Libya. November 2010.

5.7 - Housing

Pre-crisis situation

Under the government social assistance system, electricity is believed to be subsidized to about 60% of market price. Long-term, no-interest housing loans on concessional terms (30 terms) enable the vast majority of families to own their own homes. Public sector workers receive a monthly housing allowance that ranges from 12% to 24% of salary.

According to 2007 PAPFAM survey, the majority of families (93%) are home-owners, and have access to electricity. About 2/3 are connected to the water supply network.

Main changes since the crisis and perspectives

- In directly affected cities, the conflict entails severe destruction of private and public infrastructures.
- Displacement will also lead to further losses, as houses and belongings are looted and occupied. Compared to other situations however, displaced persons are more likely to own documents or be able to prove housing ownership given the level of literacy and administrative capacities in Libya (although official records may be destroyed) and could be in an easier position to defend their rights for repairs and compensation once the conflict is over.
- **FOOD SECURITY INSTITUTIONS AND GOVERNANCE**
- **Findings and Recommendations of the Rapid Assessment in Eastern Libya – April 2011**
- The mission has reviewed food systems, covering the supply / demand chain for various commodities and interviewing the relevant public and private actors.
- The local authorities, civil servants and private traders/millers have shown good will and open mind to undertake necessary reforms addressing mis-management, mis-targeting and other acknowledged shortcomings of the existing food systems, including food market subsidies and social safety nets.
- However, their immediate concern is to secure resumption of upstream sourcing of food commodities currently disrupted by lack of import. Replenishment of commodity stocks being used up is an urgent matter. Commercial import should be immediately reactivated by resolving the banking transaction blockage and resuming shipping to the ports.
- Distribution systems are operational, despite the shortage of manpower caused by the outflow of migrant labourers. Food commodity distribution is the most resilient section of the food systems.
- Moreover, fiscal resources to feed food subsidies and social safety nets will soon dry up.
- The public sector is used to operate the food system based on financial appropriations and commodity stocks defined and operated out of Tripoli. The local authorities and actors have a good knowledge of international and local markets but need immediate technical support to empower them with policy capacity to replace the old top-down decision making process. Such policy capacity should be informed by enhanced monitoring mechanisms.
- To facilitate the transition to a more transparent food system and to enhance social accountability, currently mushrooming NGOs should be urgently supported with capacity building initiatives. This is essential to capitalize on the present social mobilization and help building new food systems based on informed decisions, including monitoring of food distribution schemes and social safety nets, to ensure maximum equity and social protection.
- Support to local food production is also urgently needed to maintain strategic productive capacity in key sub-sectors –namely poultry, sheep/goats, dairy and fresh vegetables. This would protect access of poor/vulnerable population groups to fresh and nutritious foods at a time when consumers have to make difficult choices on the use of their shrinking disposable income and declining purchasing power. Moreover, this would minimize the loss of dignity and the social stigma associated with food assistance. Voucher schemes to protect access to those foods should be urgently studied and activated.

VI - CONCLUSIONS ON THE HOUSEHOLD FOOD SECURITY SITUATION

6.1 - Severity of household food insecurity

Pre-crisis situation

The Global Hunger Index of the International Food Policy Research Institute (IFPRI) classifies Libya in the “low hunger” category, based on the combination of the proportion of undernourishment in the population⁴⁷, the prevalence of underweight children under-5, and the under-5 children mortality rate.

The average dietary energy available for consumption (based on Food Balance Sheet) was high at 3140 kcal/person/day in 2005-07. Levels of poverty were quite low (13% in 2002-03) and declining, and extreme poverty is not reported.

Levels of acute malnutrition are also not alarming, but one every five children 6-9 months is stunted, indicating issues with child feeding practices – including breastfeeding and dietary diversity- and infectious diseases – probably mostly water-borne diseases like diarrhoea.

Up-to-date information and baseline data on food security remains patchy and unconfirmed, especially from Libya. No food security monitoring system exists to inform policy based on availability and market stability, or household economic access and consumption. This is of particular concern vis-à-vis soaring food prices in international markets and domestic economy decline.

Changes since the crisis and perspectives

All the food security components are being affected by the conflict, including:

- Agricultural production:
 - loss of productive capacities due to the departure of migrant workers and interruption of input supplies;
 - insecurity disrupting transport and trade of produce.
- Market supplies:
 - interruption of imports and anticipated exhaustion of stocks handled by PSF, including for subsidized staple commodities (wheat, rice), leading to shortages and to rise of food prices which are not contained anymore by the government subsidy system, at least in opposition-controlled areas;
 - shop closure due to insecurity and to depressed household demand.
- Household economic access to food:
 - suspension or delayed salary payment for civil servants, especially in opposition-controlled areas;
 - for the self-employed and traders, loss of income as businesses must close or their economic activity is depressed due to insecurity, lack of raw material, and low demand
 - higher prices owing to the disruption of the subsidy scheme and food shortages.
- Food consumption and utilization:
 - decreased amount (expected) and lower variety of food consumed, particularly fresh items, as:
 - (i) access to cooperatives and shops becomes difficult (insecurity, closure), (ii) less food is available, and (iii) purchasing power is depressed by lower income and rising food prices;
 - higher risks of infectious diseases and of acute malnutrition, as water supplies and sanitation systems are disrupted, and access to health facilities and drugs increasingly difficult in conflict areas (destruction, departure of health staff, exhaustion of drug supply).

⁴⁷ FAO does not provide data on the prevalence of undernourishment in the population (based on the distribution of available dietary energy per capita) due to lack of data. IFPRI's own estimates for the calculation of the Global Hunger Index indicate 2% of undernourishment.

6.2 - Main characteristics of food-insecure households and individuals

Pre-crisis situation

Households relying on single breadwinner and/or low-remunerating sources of income

Because food consumption and access to food in the Libyan context are intimately linked with households' purchasing power, food insecurity is closely associated with poverty. In a context of rapidly rising food prices, the severity of food insecurity increases and households 'at the margin' fall into food insecurity. However, the Government's large-scale food subsidy programme and the top-up measures taken in response to the latest food price rises have probably cushioned food-insecure and vulnerable households from a deterioration of their situation.

Migrants

Migrants do not benefit from staple food subsidies, housing allowances and free health and education services. While their earnings may not be lower than some of the nationals, typically a large share will be sent back home. In the absence of subsidies, their expenditures are higher than the nationals, and arbitrage between food and non-food expenditures may result in less diverse and lower amounts of food consumed, with negative effects on the nutritional status of vulnerable individuals. There are no studies however, that document the food security situation of migrants in Libya.

Changes since the crisis and perspectives

- Households who were richer and food-secure prior to the crisis are more likely to withstand the effects of the conflict on their physical and economic access to food, owing to: (i) larger cash reserves and possibly some food stocks, (ii) extended network of family and relatives, and (iii) availability of transportation means. However, the prolongation of the conflict will quickly erode these coping capacities.
- Prices of many commodities are rapidly increasing, with the exception of wheat flour, bread and rice that are protected by the PSF subsidy mechanism for the existing stocks. Private traders tend to maintain pre-crisis prices for existing stocks of all commodities and do not retain stocks. However, imported commodities (mostly from Egypt) are more expensive at both wholesaler and retailer levels, also due to declining exchange rate of the Libyan Dinar.
- As a result, food insecurity will increasingly be linked to location (directly conflict-affected areas and other areas which rely on conflict-affected areas for food supply and economic activities) and to displacement status (loss of former livelihood providing cash and sometimes food), rather than to pre-crisis wealth status and professional occupation.

The following groups may be expected to be/have become food-insecure due to the conflict:

Residents (non-displaced), including nationals and migrants

- Residents in directly conflict-affected cities and surroundings, as well as residents living in non-conflict areas which cannot be accessed for security reasons (e.g. road crossing a conflict area):
 - They may be affected by shortage of food in shops and markets, and higher food prices.
 - They are likely to restrict their movements for security reasons, further limiting their physical access to food and other essential goods including water and cooking fuel.
- Households depending on income from the public sector, as the payment of salaries has been discontinued.

- Residents living in areas not directly under fire but who depended on migrants for essential economic activities or on supplies from conflict-affected areas for economic activities: they may be unable to pursue their income-earning and agricultural activities.

Internally displaced persons, including nationals and migrants

- Libyan IDPs have lost their former livelihoods and sources of food and income:
 - Those who were relatively wealthy before the crisis may have been able to bring along cash savings, jewellery and other valuable assets which will help them to pay for food and other expenses for some time.
 - Others will not have this temporary cushion and will rely immediately on support from relatives, non-displaced residents, and relief organizations for meeting their food and other essential needs.
- Migrants have been directly targeted by attacks, especially those from Sub-Saharan Africa. While many have crossed borders to Egypt, Tunisia, Algeria, Niger, Chad and Sudan, displaced migrants stranded inside Libya are in a similar or worse situation as Libyan IDPs. Only a limited number of migrants are believed to have worked in a well-paid occupation before in Libya and they may not have been able (or authorised) to withdraw their savings from bank accounts before leaving their place of work. As such, most migrants displaced in Libya will not have sufficient cash to meet their food and other basic needs without external support.

6.3 - Location of food-insecure households

Pre-crisis situation

There is no information on the location of poor households and no strong indications of differences between urban and rural areas. Only 15% of the population reside in rural areas. Those living in remote desert locations may be more vulnerable to food insecurity owing to the lack of basic services (health, water, education) which increase risks of malnutrition among children and limit income-earning opportunities.

Changes since the crisis and perspectives

The following areas are likely to concentrate the largest numbers of food-insecure households:

- Directly conflict-affected areas where supply of food to cooperatives and retail outlets is interrupted and stocks are being exhausted, and where population movements are severely impaired: food access and consumption of both residents and IDPs in these areas will be affected by shortage of food and higher food prices.
- Areas not directly under fire but whose access (e.g. road cut-off) is hampered by the conflict: the population there is also likely to experience food shortages and higher prices as food cannot be supplied to selling points.
- Areas not directly under fire but which relied heavily on migrant labour for economic and food production activities. They include agricultural areas and state farms where large number of migrants (now departed) was employed, and other areas with specific activities that used to employ migrants.

6.4 - Number of food-insecure people

Pre-crisis situation

There are no figures on the number of food-insecure people in Libya. However, some tentative estimates can be made based on the prevalence of poverty at 13% in 2002-03.

Income (poverty) and access to food are closely related in Libya due to the high reliance on market purchases for food. With the exception of meats, potatoes and tomatoes, the country is far from being self-

sufficient in food and even the few households engaged in agriculture (8% of the labour force) would not be able to meet their consumption requirements for cereals and animal products. Not all poor people are food-insecure, especially considering the food subsidy scheme. However, food subsidies apply to cereals only, and poor households may thus have inadequate dietary diversity due to low consumption of animal products, fruits and vegetables. Such a diet would also contribute to the estimated 20% stunting among children under-5.

Poverty levels have been declining since the 1990s, however the increase of food prices in 2008 and end 2010 may have stalled the progress in poverty reduction, despite the food subsidies scheme and top-up measures by the government. In the absence of updated data, the 13% poverty figure is used acknowledging that the actual poverty rate may be lower. As a result, based on a 6 million population⁴⁸, about 780,000 persons would have been poor – and presumably food-insecure – before the conflict.

This figure does not include migrants, whose poverty and food security situation is unknown. However, the majority seems to be engaged in low-paid occupations, and given that they do not benefit from food subsidies and other allowances, the level of poverty may be quite high among migrants, most of whom were pushed to migrate due to poverty in their home country. Using a probably conservative estimate of 25% poverty, some 500,000-625,000 migrants may have been food-insecure based on a 2-2.5 million migrant population.

Changes since the crisis and perspectives

The number of food-insecure people will have increased due to the impairment of food production and supply, food access and food consumption and utilization. Numbers cannot be estimated without a proper household survey, however some indications to estimate figures can be given based on the assumptions made on the type of food-insecure people and their location.

1) In directly and indirectly conflict-affected areas

Pre-conflict population figures may be used to estimate the population size in cities and surrounding areas where the conflict is taking place, as well as in areas where the population may be cut-off from food and other supplies due to insecure access for traders and other input providers. Migrants and IDPs in these areas should also be accounted for.

As mentioned, a number of these people will be able to cope for a bit of time owing to cash reserves and some food stocks possibly, but the proportion of people not requiring immediate food security assistance cannot be known in the absence of assessment. Assisting only one part of the population in times of open conflict may also be counterproductive, raising tensions and requiring time and resources to target the neediest.

2) In non-conflict affected areas

Both national and migrant IDPs who moved to safe(r) places within Libya are likely to be food-insecure, although some among them will be better able to cope owing to cash and other resources they could bring along and to support from relatives who may be hosting them. IDPs who were poor before the conflict and migrant IDPs are less likely to be in such situation.

The number of these IDPs will probably be best estimated from local institutions such as the Endowment and Zakat Affairs Unit, the Libyan Red Crescent and mosques. Migrant IDPs will need to be included as well. Host families in these non-conflict affected areas may also become food-insecure after some time as their own resources are put under strain by the IDPs.

⁴⁸ As mentioned before, estimates vary from 5.7 to 6.5 million inhabitants.

6.5- Suggestions for a rapid Emergency Food Security Assessment (EFSA)

A rapid EFSA will be required as soon as security conditions allow, to provide estimates of people in need of food security assistance. This would inform the scale, geographical coverage and mechanism of a food security response, including the support to existing import capacity and social safety nets and subsidy schemes. Depending on access conditions, different approaches may be envisaged, ranging from key informants' and spot visits to a more structured household survey. As much as possible, the EFSA should cover (by priority order):

- 1) Directly conflict-affected cities and surrounding areas
- 2) Areas indirectly affected (impaired access for security reasons)
- 3) Safe and accessible areas not affected by the conflict but hosting IDPs.

In each area, the food security situation of (i) residents, (ii) IDPs, and (iii) host families, should be assessed. Both nationals and migrants in each of these categories should be considered. Simultaneously, an assessment of the potential for expanding local production of fresh and nutritious food s should be rapidly undertaken.

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