Regional Highlights

Northern region

- The Consumer Price Index for March 2011 at 358.34 was 29.99 points above that of March 2010 with a percentage change of 1.11% between February 2011 and March 2011, implying that the cost of an average food basket increased by almost 30% between March 2010 and March 2011. The average food inflation for March was 4.7%, with mineral water, soft drinks and juices recording the highest inflation of 20.2%. The Upper East and Upper West Regions were among four regions in the country which recorded inflation rate above the national average of 9.3%.

- The nominal wholesale prices for 100kg bag of maize in Tamale is ₋38, down from ₋40 in February 2011. In Savelugu and Kumbungu, wholesale maize prices stabilized at their February 2011 level of ₋35 and ₋36 respectively. In Gushegu, one of the major grain producing areas which supplies Tamale, prices of staple cereals are much lower. These range from ₋30 for maize to ₋43.7 for millet, ₋30 for sorghum and ₋73.2 for rice.

- Labour-to-maize terms of trade increased to 7.1kg from 6.4 kg in February 2011 due to improved wages possibly in response to increased demand for land preparation and other activities associated with the commencement of the season.

Upper East Region

- Food stocks available to households through their own agricultural production remain the main source of food for households’ consumption in 90% of sentinel while 10% of these sites rely on market purchases. Moderate level of food insecurity is likely to be manifesting in localized areas where production was lower than normal or where less than 60% of the total annual household food consumption requirement was attained.

- Wholesale prices for maize and millet are lower than figures for March 2010 by 10% and 9% respectively while price of sorghum and rice are higher than their level for the previous year by 5.5% and 12.6% respectively. The wholesale price of maize remained unchanged from February 2011. As compared to the five-year average, the wholesale prices of staple grains are higher by the following percentage points: 30% for maize, 24.8% for millet, 39% for sorghum and 21% for rice.

- Seasonal agricultural labour employment opportunities have been enhanced by a slight increase in dry season vegetable production and the upward adjustment in the prices of vegetables. Whereas agricultural labour-to-maize terms of trade are 6.6kg, non-agricultural labour-to-maize terms of trade are 11kg.

Upper West

- The availability of grains for household consumption remains satisfactory thanks to the above average reserves from last year and as a result, 94% of sentinel site households are able to access food through their own production. However, food security conditions are beginning to show signs of stress and the quantity of staple food stocks households are off-loading into is beginning to decline. The areas most at risk to food insecurity are parts of Lawra, Nadowli, Jirapa and Lambussie where uneven growing conditions affected production levels.

- The current price of maize in Wa is above the five-year average and that of March 2010. This is likely the result of increased market demand from neighbouring Burkina Faso where prices have increased significantly in recent months. Grain prices are higher than March 2010 by the following percentage points: 31% for maize, 27.8% for millet, 9.6% for sorghum and 24.4% for rice. In comparison with the five-year average, prices are higher by 54.4% for maize, 90.7% for millet, and 56.5% for sorghum and 54% for rice.

- Sentinel sites reports indicate increasing reliance of households in the region on casual labour as a means of improving their access to food. The average price of maize in sentinel sites is reported to have increased by 16% and as a result the labour-to-maize terms of trade declined to 7.8kg from 9.6kg in February 2011.
1.0 Onset of rains in northern Ghana
Prevailing weather conditions in March were characterized by intense heat and dryness as is typical of this time of the year. The onset of rains in some parts of the Northern Region signaled the start of land preparations, yam planting and regeneration of pastures for livestock. Many parts of the Northern Region received light to moderate showers at different periods of March with the southern half of the region recording heavy rainfall. However, most parts of the Upper East and Upper West Regions remained generally dry except for scattered showers in isolated locations in the eastern and western ends of the region. As land preparation for the commencement of the main growing season kicks off, dry season cultivation and vegetable gardening activities will be scaled down. In the major yam producing areas of the northern region, the availability of moisture aided the raising of yam mounds, boosting early planting which could aid yam cultivation during the next season.

The Ghana Health Service reports that 16 deaths were recorded on Cerebrum Spinal Meningitis (CSM) between January and March 2011 out of the 95 cases reported at health facilities across the Northern Region. The number of cases and fatalities are relatively low as compared to the same period in 2010 when 125 cases and 25 deaths were recorded. The spread of cholera from Accra to other parts of the country compelled the Ghana Health Service to declare an epidemic in March as the death rate exceeded the 1% threshold required for such a declaration. Over 4,000 cases of cholera have been recorded since the outbreak in November 2010, out of which 60 people died. The start of rains could worsen the spread of the disease due to increased contamination of food and water sources from faecal matter. In particular, the poor sanitation and hygiene practices of the populace have raised concerns that the cholera epidemic could persist for several months. With the spread of the disease to the three northern regions, rural poor and food insecure households are vulnerable to contracting the illness due to their reliance on unsafe sources of water, the high incidence of open defecation and poor knowledge of child care practices.

2.0 Food Security Summary
The high proportion of sentinel sites in which households rely mainly on own-produced grains to access food is a likely indication that food security conditions are generally stable in most parts of northern Ghana. Most of the major grain production districts are judged to be generally food secure on the grounds of their surplus production, the dependence of some major markets in northern Ghana on these locations for their grain supply and the relatively low prices of grain in those locations. In spite of the high prices of cereal grains in comparison to figures for the five-year average, they are stable in many rural and urban markets and are declining in a few markets. Food availability in northern Ghana is further enhanced by the release of milled rice and maize grain by the National Food Buffer Stock Company (NAFCO) which is sold to state institutions such as prisons, schools, hospitals and military establishments. The planned purchase of excess cereal grains from farmers this year will further create short-term employment opportunities, improve food security and contribute to poverty reduction particularly in some rural areas.

Whilst food availability is generally good, a substantial number of households in the three regions will likely experience challenges in meeting their daily food needs between April and the next harvest. These are mostly households who experienced below average annual production due to shocks during the past growing season or were unable to improve productivity through access to improved seeds and inputs due to poverty. The collapse of fishing livelihoods among fishing communities along the banks of the Volta River in parts of the East Gonja, and Central Gonja Districts, has put households at risk of acute food insecurity for a greater part of 2011. The rise in the level of water beyond the main river bank caused a significant decline in fish catch as various fish species now inhabit in shallow water of submerged land where fishing is inhibited. As the volume of water in the river begins to recede, small recovery of fishing livelihoods is expected, but only for a limited period as the resumption of normal rains will restore the river to its high level. Many of the households at risk to livelihoods need to be supported to increase their productivity during the next growing season in order to enable them meet their future food needs. The recent arrival of over 5,000 Ivorian refugees and 7,000 Ghanaian returnees from Libya into the country will increase demand for basic food commodities, but in-country stocks are deemed adequate to meet this additional demand.

The Consumer Price Index for March 2011 at 358.34 was 29.99 points above that of March 2010 with a percentage change of 1.11% between February 2011 and March 2011, implying that the cost of an average food basket increased by almost 30% between March 2010 and March 2011. The average food inflation for March was 4.7%, with mineral water, soft drinks and juices recording the highest inflation of 20.2%. The Upper East and Upper West Regions were
among four regions in the country which recorded inflation rate above the national average of 9.3%. The implementation of the Single Spine Salary structure by the Government of Ghana had been expected to improve the living conditions of people across all sectors of the society, but high inflation rate of 9.3% and the continuous depreciation in the value of the Ghanaian Cedi are eroding the purchasing power of both rural and urban households.

In the most likely scenarios (April to September 2011):
- More food stocks will be released into the market by the end of April and May 2011 as farmers prepare to purchase inputs and seeds for the next farming season. This will likely result in a slight price decrease in May, but prices are likely to increase slightly in June.
- The recent increase in the price of petroleum products will increase the cost of input and unless the subsidy on fertilizer and other inputs is sustained during the next season, many farmers may be unable to afford these much needed inputs.
- The likelihood of floods occurring in riverine communities like Buipe and other areas remains very high given the high volume of water currently on the Black Volta River and forecast of normal rains during the rainy season. This will increase the vulnerability of households to food insecurity and undermine efforts at livelihood recovery.
- Given the favourable weather forecast from the Ghana Meteorological Agency, a normal start of the season is expected, which could see most farmers planting in May and June.
- Violent storms associated with start-of-the-season rains could cause substantial damage to homes and property, requiring households to divert a portion of their resources allocated for input into rehabilitation works.

2.1 Northern Region

Food security conditions have been strengthened by the sustained access to own-produced food reserves from the previous harvest and the steady market supply in both rural and urban areas. Adequate stocks are enabling households in all sentinel sites to avoid market purchases until the start of the lean season when reserves are lean or depleted. Regular supply of food commodities is coming from the eastern corridor of the region comprising Yendi, Zabzugu, Gusheigu, Karaga, Saboba, Nanumba North and Nanumba South districts which are characterized by high production of major staples, tubers and legumes.

The purchasing power of households is sustained by income from a wide range of sources. Households are relying on the sale of food crops, livestock, remittance from able-bodied family members residing in other parts of the country, and sale of vegetable as well as small businesses. Food crop sale remain a vital source of income for men in 65% of reporting sentinel sites. These are mainly locations where there is sufficient grain to meet household consumption needs, leaving the excess grains to be off-loaded into the market. In many other sentinel sites (40%), women are increasing their dependence on the sale of firewood and charcoal and as the season progresses with food reserves tightening up, reliance on daily labour wages and sale of small livestock is expected to increase. However, livestock body conditions are becoming a source of concern in the region as a result of decreased availability of quality pasture which contributes to declining market value of these animals. Although limited pasture and browse is normal for this time of the year, conditions are worst in areas where vegetation and grass were burnt during bush fires.

Rice, maize, millet, sorghum and yam are available at all levels of the market system in the region, enabling farming households to sell and purchase food and non-food commodities. The average price of maize increased slightly to 47 Pesewas in February 2011 while wages for agricultural labour increased slightly from ¢2.85 in February to ¢3.37 in March 2011. The increase in daily labour wages is a possible response to the slight increase in labour demand for land preparation, yam mounding and other preparations for the next farming season. This contributed to a slight upwards increase in labour-to-maize terms of trade to 7.1kg from 6.4 kg in February 2011.

Many households in the flood affected communities are in danger of acute food insecurity as limited assistance has been provided to support livelihood recovery. Fishing livelihoods have not recovered as water has so far not receded. The threat of further flooding is very high in the worst affected areas where the level of the river remains very high in comparison to this same period last year. In Buipe, the high level of the Volta River and proximity of homes to the banks of the river suggest that a significant number of households will be flooded again under very normal seasonal rains.
2.2 Upper East Region

Food stocks available to households through their own agricultural production remain the main source of food for 90% of sentinels while 10% of these sites rely on market purchases. Moderate level of food insecurity is likely to be manifesting in localized areas where production was lower than normal or where less than 60% of the total annual household food consumption requirement was attained. Parts of the region with limited opportunities for dry season cultivation and areas of food crop production deficit are likely to see premature signs of food insecurity in April. This gradual decline in food security situation is expected to continue until May when a large proportion of households would have exhausted most of their stocks. In response to seasonal trends in food access and tightening up of grain reserves, households at risk of food insecurity are adjusting their use of available stocks by not selling it in the market. As a result, food crop sale has diminished as a source of income for households. Instead, the sale of livestock and vegetables were the two most important sources of income for men and women at 58.6% and 34.5% respectively.

Good availability of water in dams and irrigation sites ensured above average harvest of vegetables, enabling farmers to tap into the large demand for onions, tomatoes and black pepper in the southern cities of Ghana. This improved the income of many farmers and their access to food. Besides vegetable production, income for women is coming from making of handicrafts (27.6%) and firewood (20.7%). The recent increase in the price of kerosene and liquefied gas has driven more household to rely on wood fuels, thus increasing demand for firewood and charcoal. As a result, coping strategies like fuel wood sale remain viable for poor households to avoid slipping into acute food insecurity before the start of the lean season. As the start of the farming season approaches and the cultivation of vegetables is scaled down, women will increase their participation in the making of handicrafts and wage labour employment. Land preparation for the cropping of maize and water melon has already commenced along the Volta River stretching from Pwalugu to the border areas with Burkina Faso.

Seasonal agricultural labour employment opportunities have been enhanced by a slight increase in dry season vegetable production and the upward adjustment in the prices of vegetables. Whereas agricultural labour-to-maize terms of trade are 6.6kg, non-agricultural labour-to-maize terms of trade are 11kg.

2.3 Upper West Region

The availability of grains for household consumption remains satisfactory thanks to the above-average reserves from last year and as a result, 94% of sentinel site households are able to access food through own-produced food reserves. However, food security conditions is beginning to show signs of stress and the quantity of staple food stocks households is off-loading into are beginning to decline. The areas most at risk to food insecurity are parts of Lawra, Nadowli, Jirapa and Lambussie where uneven growing conditions affected production levels. While food is generally available in the market, the purchasing power of farming households has declined as most of the agricultural produce/cash crops which constituted the main sources of income are exhausted. Reliance on crop sale as a source of income is declining with 61% depending on this source as compared to 71% in February 2011.

The likely increase in the proportion of households facing moderate food insecurity in the region also means that those deficit households will resort to the market to cover their food needs prematurely. Households whose food reserves are drawing down quickly will face a number of challenges during the growing season including dividing their time between working on their own farms and for others in order to purchase grain. The high energy requirement of farm work means that their health could suffer without adequate food while the households’ needs for health care and other services could be undermined due to lack of income.

Sentinel sites reports indicate increasing reliance of households in the region on casual labour as a means of improving their access to food. The average price of maize in sentinel sites is reported to have increased by 16% and as a result the labour-to-maize terms of trade declined to 7.8kg from 9.6kg in February.
3.0 Price trends and marketing activities

3.1 Northern Region

The market supply of staple cereal grains and tubers remain strong in monitored urban markets thanks to steady inflows from assembly markets, which are in turn fed by supplies from villages within their catchment areas. The supply of agricultural produce to Tamale market is coming from Gusheigu, Karaga, Yendi, and Zabzugu markets. Stocks from Karaga and Gusheigu and other Northern Region markets such as Bunkprugu, Walewale, Nalerigu, and Langbinsi remain a major source of grain supply to markets in the Upper East region. As the market supply of locally produced cowpea is currently limited, most of the cowpea available in the market is imported from Burkina Faso and Niger while small qualities also come from Mankarigu and Janga in the region where it is cultivated in irrigated fields. As the stocks of cereal inflows to assembly tightens and prices increase in those locations, the market supply dynamics will be transformed drastically, with reduced grain inflows from Gusheigu and Yendi to markets of the Upper East Region.

The nominal wholesale prices for 100kg bag of maize in Tamale is ₡38, down from ₡40 in February 2011. In Savelugu and Kumbungu, wholesale maize prices stabilized at their February 2011 level of ₡35 and ₡36 respectively (Figure 1).

At their current level, the prices of maize are lower than the figures for March 2010 by 5% in Tamale and 10.3% in Savelugu, but slightly higher in Kumbungu by 3%. In Gusheigu, one of the major grain producing areas which supply Tamale, prices of staple cereals are much lower. These range from ₡30 for maize to ₡43.7 for millet, ₡30 for sorghum and ₡73.2 for rice. Similarly, Karaga which is another major market supply point for Tamale and some markets in the Upper East has some of the lowest cereals prices in the region. Prices of maize and millet are lower than Tamale by 27% and 65% respectively. The prices of staple cereals are higher than the five-year average price for Tamale by the following percentage points: 19.4% for maize, 36.3% for millet, 64.8% for sorghum and 31% for rice. In urban areas where rice is a staple diet of the populace, the current price is 6.7% higher than the previous year in Tamale and 30.4% higher than in Savelugu. The nominal wholesale price of millet and sorghum are all currently at their March 2010 level of ₡60. The price of millet range between ₡57 in Savelugu and ₡50 in Kumbungu, signifying low profit margin for grain dealers trading between these two locations and Tamale. The stable and low prices of grains could ease fears of early deterioration in food access by food-purchasing households before the start of the lean season.

![Figure 1. Wholesale prices of 100kg cereal grains in Tamale](image-url)
3.2 Upper East Region

Bolgatanga remain the central point of trade in agricultural commodities with other markets in the region and the southern markets of Burkina. The current wholesale prices of 100 kg cereal grains are lower than figures for March 2010 by 10% for maize and 9% for millet while price of sorghum and rice are higher than their level for the previous year by 5.5% and 12.6% respectively (Figure 2). The wholesale price of maize remains unchanged from February 2011. As compared to the five-year average, the wholesale prices of staple grains are higher by the following percentage points: 30% for maize, 24.8% for millet, 39% for sorghum and 21% for rice.

The relatively low price of maize, in the face of the recent fuel price increase will ease concerns about the potential impact of food price increases on rural poor and urban dwellers. With more stocks of cereal grains yet to be released into the market, it is likely that steady supplies will keep prices at their 2010 level during May and June, enabling modest access for food-purchasing households during the lean season.

3.3 Upper West Region

Trends in prices of grains in some monitored markets suggest high level of market instability. The current price of maize in Wa is above the five-year average and March 2010. This is likely the result of increased market demand from neighbouring Burkina Faso where prices have increased significantly in recent months. Grain prices are higher than last year by the following percentage points: 31% for maize, 27.8% for millet, 9.6% for sorghum and 24.4% for rice. In comparison with the five-year average, prices are higher by 54.4% for maize, 90.7% for millet, and 56.5% for sorghum and 54% for rice (Figure 3). While these prices are high in comparison with the previous year, it is likely the supply of maize and other cereals from this source will peak in May and June as farmers prepare to offload their stocks in preparation for the next farming season. Such strategic sales will increase market supply and could likely reduce prices to their level for 2010. With prices of all major...
staples still increasing in the region, access to food by market-dependent households could be restricted. If this price trend continues, the food security situation in communities with production deficits from the 2010 growing season who are currently dependent on local purchases to sustain their diet will deteriorate significantly at the start of the lean.

4.0 Health and Nutrition
The nutritional status of selected children under two (2) years of age in the Northern, Upper West and Upper East regions were assessed using the weight-for-age (WFA) indicator. Data was gathered from fourteen (14) selected health institutions in ten (10) districts close to the respective Ministry of Food and Agriculture (MoFA) sentinel sites in the three northern regions.

The Information was gathered during growth monitoring sessions carried out by the Ghana Health Service (GHS) at outreach points of these health centres. The data is therefore from individuals who are patronizing children health services, so there is an element of self-targeting. The percentages of these underweight children examined (95% CI) shows the combined effects of acute and chronic malnutrition, as shown by the figure below. It compares the nutritional status of children of March 2011 with the corresponding status in February, 2011.

4.1 Observation
The above information indicates that more malnutrition was observed in the health centres in the Northern and Upper East Regions for March, 2011 with Northern Region recording the highest increase but the reverse is seen for the Upper West region. The situation in the Northern Region needs close monitoring as we are in the lean season.

5.0 Conclusions
Availability: Good cereal availability in the three northern regions is enabling continued access to own-produced food in 96% of sentinel sites. This trend suggests that on the whole, food reserves are steady, reflecting the above-average harvest that was attained from the growing season of 2010. It is therefore likely that most households will retain sufficient reserves to carry them through the lean season.

Access: The rising prices of cereal grains in the Upper West Region has raised concerns about reduced market access to staple cereals by food-purchasing households given that the region had the lowest proportion of sentinel sites in which households accessed their food from the own harvest in March 2011.