Regional Highlights

Northern region

- Food security conditions continue to be stable in the majority of localities where own-produced grains remain the primary sources of food for meeting households’ needs although there are variations in these conditions between areas of surplus and deficit food production.

- Whereas the cost of an average food basket for a rural household of five people (for one month) comprising 6 bowls of maize/millet (2.5kg) at €6.3, a sachet of salt (500 grams) at €0.5, 4kg of tomatoes at €5, a bowl of fish (2.5kg) at €7.5, three (3) bowls of Rice (7.5kg) at €5.5 and 2 liters of groundnut cooking oil at €5.2 was €35.22 in February 2011, it increased by 44.4% to € 50.85 in February 2012. Although these estimates were made using data from the Northern Region, it is reflective of the general increase in the cost of a typical food basket in northern Ghana.

- In Tamale market, the percentage increase in nominal wholesale grain prices over February 2011 was 50% for maize, 33% for millet, 33% for sorghum and 56% for rice (Figure 1). Compared to the five-year average, prices are even much higher and vary from 87.5% for maize, 43% for millet, 68% for sorghum and 103% for rice. Goat-maize terms of trade was down to 78.1kg from 107kg in February 2011 while labour-maize terms of trade was 5.9kg in February, down from 6.4kg in February 2011.

Upper East Region

- In 94% of reporting sentinel sites, most households were reliant on own-produced reserves to meet prevailing food needs. However, due to the large deficit in millet production which is the main staple for most rural households, strains in food access could begin to emerge in isolated locations by the end of March as food deficit households begin to exhaust their reserves.

- The 57% decline in the nominal wholesale price of 73kg bag of onion from €180 in February 2011 to €78 in February 2012 in Bolgatanga market implies that a household is currently able to purchase one bag of millet through the sale of a bag of onion as compared to 3.5 bags for February 2011. In February 2012, the nominal wholesale grain prices for Bolgatanga were higher than the previous year by the following percentages: 55% for maize, 36% for millet, 48% for sorghum and 60% for rice.

- Labour-maize terms of trade was down to 6.3kg from 9.7kg in February 2011, primarily due to substantial increase in the price of maize. Goat-maize terms of trade was down by 59% from 139.9kg in February 2011 to 60.2kg in February 2012 due to skyrocketing price of maize and relatively low prices of goats.

Upper West

- In February, 94% of sentinel sites were reliant on own-produced grains to meet their food needs in spite of the marked decline in the yields in the major producing districts. Due to the decline in production of major cash crops and staples during the past growing season, the sale of crops to generate income was most common in 75% of sentinel sites in February 2012 as compared to 85.7% of sentinel sites in February 2011.

- The nominal wholesale price of 100 kg millet increased by 13% from €90 to €102 in Wa market between January and February 2012. Similarly, the nominal wholesale price of 100kg sorghum increased by 7.5% from €73 to €78.8.

- Whereas goat/maize terms of trade was 59kg as compared to 85.95kg for the previous year, labour/maize terms of trade was 6.7 kg as compared to 9.6kg for the previous year.
1.0 Concerns about production levels and grain availability in northern Ghana

The general decline in the production of major crops in many districts of northern Ghana has raised concerns about its impact on market supply for domestic consumption and the prevailing high demand from neighbouring countries where production suffered a decline. In the particular case of rice, the production deficit in the major producing areas will have far reaching consequences since the bulk of local rice production in Ghana as a whole comes from the three northern regions. Overall, food production in the past growing season for many districts fell short of the level for the previous year, raising concerns that food security conditions will be very difficult to manage in the traditional food deficit parts of northern Ghana. The combined production of the four major cereal grains (maize, sorghum, millet, and rice) in the Northern, Upper East and Upper West Regions is estimated at 577,422 metric tons, 304,794 metric tons and 224,341 respectively. As compared to the 2010 season, the production of these grains declined by 1.7% for Northern Region, 12.5% for Upper East and 23% for Upper West Region. The plan by the government of Ghana for the importation of 43,000 metric tons of maize to supplement local production could help in stabilizing the prices of these staple food commodities and possibly improve access to food.

2.0 Food Security Summary

Food security conditions remain stable in the majority of localities in northern Ghana as market supply conditions have improved, leading to reasonable stability in the prices of major staples. Most major markets either recorded a decline or stability in the prices of staple grains. Market conditions in February were also characterized by reduced purchase of large quantities of grain as industrial purchases were mostly carried in December 2011 and January 2012. In spite of the relative stability in the prices of major staples, food access for most poor urban and rural households may not see a significant boost as a result of a general increase in the cost of an average food basket.

Whereas the cost of an average food basket for a rural household of five people (for one month) comprising 6 bowls of maize/millet (2.5kg) at ₡6.3, a sachet of salt (500 grams) at ₡0.5, 4kg of tomatoes at ₡5, a bowl of fish (2.5kg) at ₡7.5, three (3) bowls of Rice (7.5kg) at ₡5.5 and 2 liters of groundnut cooking oil at ₡ 5.12 was ₡35.22 in February 2011, it increased by 44.4% to ₡50.85 in February 2012. Although these estimates were made using data from Tamale market in the Northern Region, it is reflective of the broader increase in the cost of typical food basket in the three northern regions. The increase in the cost of living which could constrain the purchasing power of poor urban and rural households is the combined effects of the deficit in food production across Ghana and the continuing hikes in transportation charges coupled with rising inflation. Consequently, further increase in the cost of the food basket is highly anticipated by the peak of the lean season. Food deficit households could begin to experience deterioration in their food security conditions from March 2012 as they may have already consumed half of their harvest for 2011. Besides, the significant decline in the output of major cash crops will increase pressure on these households in their bid to meet urgent household expenses by selling off a portion of their meager reserves. As a consequence, low income households are likely to endure constrained access to basic food commodities due to reduced purchasing power, leaving such households moderately food insecure until the next harvest.

Due to the vast opportunities for dry season farming in the Upper East Region, some food deficit households may intensify dry season cultivation to complement the production shortfall from the main season. These areas provide a significant share of the onion and tomatoes supply to various parts of the country and the available opportunities to generate income could enhance households’ capacity to replenish their food stocks and to meet essential household expenditure. The continuing depreciation of the Ghana Cedi has raised concerns about its impact on the prices of imported food and non-food items. An increase in the cost of imported food items, coupled with the continuing upward increase in inflationary trends could further contribute to the deterioration in the purchasing power of poor households. The inflation rate remained at 8.6% in February 2012.

2.1 Northern Region

Food security conditions continue to be stable in the majority of localities where own-produced grains remain the primary sources of food for meeting households’ needs. Even so, there is significant variation in food security conditions between areas of surplus grain production where relatively low prices, coupled with high market and household stocks are ensuring continuous inflows into consumer markets and the deficit areas where poor harvest of rice, maize and groundnuts have constrained market supplies and kept prices very high. In the areas along the central part of the region drained by the White Volta River where grain yields from the main season were generally poor,
In the most likely scenarios:

- Pre-season activities are likely to commence in April, particularly in the southern districts of the Northern Region where the seasonal rains arrives earlier than other places.
- Food security conditions will begin to deteriorate in deficit areas with most households expected to be affected by low purchasing power due to the absence of the regular cash crops to generate income. Household expenditure on basic services such as medical care, health insurance coverage and schools fees may be impacted as result.
- Due to the increased sale of crops to purchase inputs and other agriculture related expenses, the prices of most commodities may become temporarily stable by the end of May, but could increase afterwards.

2.2 Upper East Region

Food security conditions are generally stable in most localities in the region as households continue to benefit from prevailing stocks from the last harvest. In 94% of reporting sentinel sites, most households are reliant on own-produced reserves to meet their food needs. However, due to the large deficit in millet production which is the main staple for most rural households, strains in food access could begin to emerge by the end of March in isolated locations as food deficit households exhaust their reserves. In parts of Buiisa, Kassena-Nankana and Bawku West districts where the millet production deficit was high, some rural households are intensifying the cultivation of dry season crops along river valleys and dug outs. The significant decline in the price of 73kg bag of onion from 38¢ in February 2011 to 78¢ in February 2012 in Bolgatanga market will affect these households’ ability to purchase grain. The 57% fall in the market price of onion implies that a household is currently able to purchase one bag of millet through the sale of a bag of onion as compared to 3.5 bags for February 2011. On the contrary, the price of a crate of tomatoes increased by 60.5% from 38¢ in February 2011 to 61¢ in February 2012 in Bolgatanga. With the February 2012 price of millet at 75¢ as compared to 51¢ for February 2011, the millet/tomatoes terms of trade has appreciated by 9.3%, primarily due to an increase in the price of tomatoes over the previous year.

The occasional sale of a portion of grains from the last harvest and vegetables produced during the current dry season constitute the highest share of income generated by men in most reporting sentinel sites. Women are predominantly reliant on vegetable production, complemented with petty trade activities. Market availability is generally satisfactory as nearby markets provide adequate stocks to meet the high demand for grains. Sheep-to-maize terms of trade is 72kg while goat-maize terms of trade is 57.6kg, both showing a decline in comparison to the previous year. Labour-maize terms of trade was down to 6.3kg from 9.7kg in February 2011, primarily due to substantial increase in the price of maize. Similarly, goat-maize terms of trade was down by 59% from 139.9kg in February 2011 to 60.2 kg in February 2012 due skyrocketing price of maize and relatively low prices of goats.
2.3 Upper West Region

In February, 94% of reporting sentinel sites were reliant on own-produced reserves to meet their food needs notwithstanding the marked decline in yields in the major producing districts. The level of production decline has affected farmer’s ability to generate income through the sale of some portion of their crops, leading to a drop in the proportion of sentinels where men rely on crop sale for income from 85.7% in February 2011 to 75% in February 2012. In sharp contrast to income sources for men, 48% of sentinel sites see petty trade, including the sale of firewood as the most dominant source of income for most women. The impact of grain production deficit in the region will become more intense as the number of households who are currently reliant on their own grain reserves turns to the markets to maintain their access to food. With limited strategies for coping with reduced access to grains, the proportion of women engaged in the business of firewood and charcoal sale will increase drastically as the lean season approaches. The women in this sector are motivated by the increased cost of liquefied gas which caused an increase in the demand for charcoal. Whereas goat/maize terms of trade was 59kg as compared to 85.95kg for the previous year, labour/maize terms of trade was 6.7 kg as compared to 9.6kg for the previous year.

3.0 Price trends and marketing activities

3.1 Northern Region

Market conditions in the region are marked by stable supply of a wide assortment of agricultural commodities and relatively stable, but high prices of the major staple crops. Since 2007, the prevailing prices of staple cereals in February have been consistently higher than the preceding year. This implies that prices for the current year are always high than the previous year, generating pressure on the limited resources of households who are reliant on purchased grains to meet their food needs. The resulting impact has been an increasing trend in the migration of farmers from the Guinea Savannah agro-ecological zone to the southern and middle portions of the country in search of better production opportunities. Part of the increasing price trend is associated with the hikes in the cost of transportation over the past five years. The nominal wholesale price of maize in most supply markets declined slightly between January and February 2012, reflecting the fall in the volume of market purchases undertaken by industrial, poultry and pharmaceutical companies. The wholesale price of maize in key supply markets of Walewale, Nalerigu, Gusheigu, Zabzugu and Kumbungu decreased by 6.7%, 5.4%, 14.9%, and 6.3% respectively. In Tamale market, the percentage increase over February 2011 was 50% for maize, 33% for millet, 33% for sorghum and 56% for rice (Figure 1). Compared to the five-year average, prices are even much higher and vary from 87.5% for maize, 43% for millet, 68% for sorghum and 103% for rice. Market price trends for the rest of the year will be dictated by the volume of stocks brought into the market and the level of demand by food deficit localities.

3.2 Upper East Region

In contrast to the slight decline or stability in the nominal wholesale prices of most cereals, the nominal wholesale price of 100kg rice actually increased in all major markets in the region between January and February 2012. The general upward trend in the price of rice is likely linked to the poor production in the major producing areas which was caused by early cessation of rains at the booting and grain filling stage. Bolgatanga, Navrongo, Garu and Fumbisi recorded...
increases of 14.3%, 3% and 8.4% and 54% respectively. Maize, millet and sorghum supply in Bolgatanga, Bawku and Garu markets in February benefited from the inflow of grains from major supply markets of the Northern Region such as Langbinsi, Nalerigu, Bunkprugu, Gusheigu and Karaga. The normal wholesale price of maize in these major markets ranged between ₦51 to ₦70 as compared to nominal prices for February 2011 which ranged between ₦42 and ₦45.

Cereal grain prices for February 2012 in Bolgatanga in particular were higher than the previous year by the following percentage points: 55% for maize, 36% for millet, 48% for sorghum and 60% for rice (Figure 2). As compared to the five-year average, prices were up by 73% for maize, 54% for millet, 63% for sorghum and 94% for rice.

The presence of traders from Burkina Faso and Mali continue to impact on market supply as prices are sustained at very high level. The general outlook for the market for cereals for the next three month is that prices may continue to increase in response to seasonal decline in grain availability and reduced market supply. Although prices for most grains in February remained unchanged from the previous month, their current level may be already prohibitive for many low income rural households whose grain stocks are getting depleted.

3.3 Upper West Region
During January and February each year, the prices of food commodities normally decline slightly after large quantities of agricultural commodities are supplied to the market in December. The nominal wholesale price of 100 kg millet increased by 13% from ₦90 to ₦102 in Wa market between January and February 2012 while the nominal wholesale price of 100kg sorghum increased by 7.5% from ₦73 to ₦78.8. As compared to the previous year, the price of maize is currently up by 60% (Figure 3). While the nominal wholesale price of most cereals were stable or declined in Tumu, the nominal wholesale price of millet increased by 17.6% during the same period. Cowpea, recorded the most drastic increase of 52% in Tumu market over the same period while groundnuts went up by only 7%. Lawra market, which is close to the border town of Hamile was the only market that experienced an upward surge in the prices of all major food commodities with maize increasing by 12.7%, local rice went up by 9% while both millet and sorghum increased by 7%. Cowpea recorded the highest increase of 16.7%. The nominal wholesale prices of millet and sorghum for February have recorded progressive annual increases over the past four years, with the increase in
February 2012 over February 2011 being the highest at 43.7% and 33.8% respectively.

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 seventeen (17) 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, are shown in the figure 4 -which compares the nutritional status of children between critical months in the lean (June ) and the period after the harvest season months (Nov – Feb) of northern Ghana from 2008 to 2012;

**Observation:**
Generally, the levels of underweight are lower during the harvest season (as shown for November) for all regions as compared to the levels in the lean season months (June). For February 2012, there is a downward trend in malnutrition in all the three northern regions.

![Figure 4. Trends in malnutrition in northern Ghana](image-url)