Africa Food Security Brief

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The findings of this paper reflect the opinions of the authors and not necessarily those of the African Development Bank, its Board of Directors or the countries they represent.

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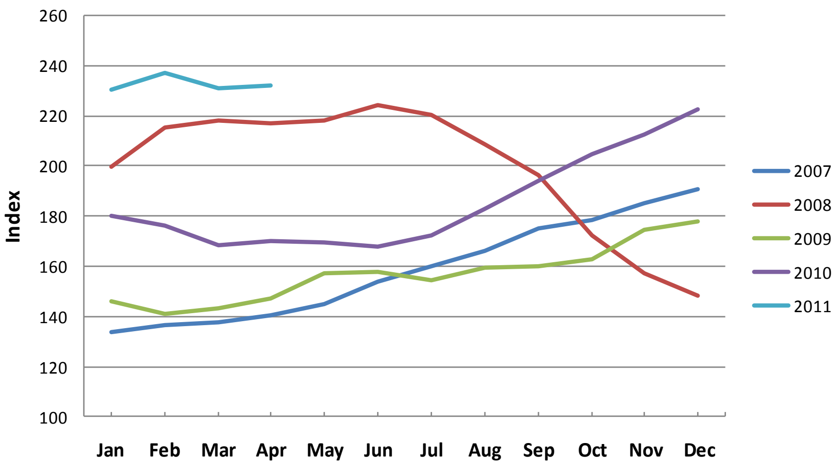
1. Overview of the recent trends of food prices

The drastic surge and volatility in international food prices in recent months have stoked fears of a replay of the 2007/08 global food price crisis, which sparked riots and associated political uncertainty across countries in the developing as well as the developed world.

1.1 Global food prices escalated in February 2011

Chart 1: Monthly Food Price Index



According to the Food and Agriculture Organization (FAO), the global Food Price Index reached a record high in February 2011, mainly due to increased prices of cereals, meat, and dairy products.

In February 2011, the Index rose for the eighth consecutive month, to the 236 level, up 2.2 percent from January alone. This is the highest (in both real and nominal terms) in 20 years (since January 1990, the inception date of the Index).[1] Except for sugar, prices of all other monitored commodity groups recorded gains in February, with dairy products and cereals leading the way. This led the FAO to caution that "while most indicators point to increased cereal production in 2011, the projected growth may not be sufficient to replenish inventories, in which case prices could remain firm".[2]

In March–April 2011,[3] the Index remained stable at 232 points, which was a decrease of 2 percent from its February peak. However, it remains at 36 percent higher the level of April 2010 (see Chart 1)[4]. During the same period, international prices of cereals recorded a slight increase, while those of oil and meat remained unchanged, and dairy and sugar prices declined. In April 2011, the cereal price index reached 265 points (5.5 percent higher than in March 2011 and 71 percent higher in April 2010). The oil and meat price indices remained at the same level as in March 2011, at 259 and 173 respectively. Dairy and sugar price indices registered 229 and 348 points respectively, which was a decrease of 2.4 and 7.0 percent from their March 2011 levels (see Chart 2).[5]

The trend of international cereal prices is further analyzed in Chart 3.[6] It appears that, despite the price of rice now falling back to its September 2010 level, in May 2011 it was still higher than that of other major cereals (coarse grains – maize and sorghum – and wheat). From October 2010 to April 2011, the price of wheat, sorghum, and maize increased by 25 percent, 31 percent, and 36 percent respectively, before decreasing slightly in May 2011.

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[1] FAO. May 5, 2011. Global Food Price Monitor.
[2] FAO. April 7, 2011. Media Centre.
[3] FAO. April 7, 2011. Global Food Price Monitor.
[4] Data Source: FAO (2011). *FAO Food Price Index* [Online] Available from:http://www.fao.org/worldfoodsituation. (Accessed: May 24, 2011).

[5] Data Source: FAO (2011). *FAO Food Price Index* [Online] Available from:http://www.fao.org/worldfoodsituation. (Accessed: May 24, 2011).
[6] Data Source: FAO (2011). *GIEWS Food Price Data and Analysis Tool* [Online] Available from: http://www.fao.org/giews/pricetool2/(Accessed: 24 May 2011).

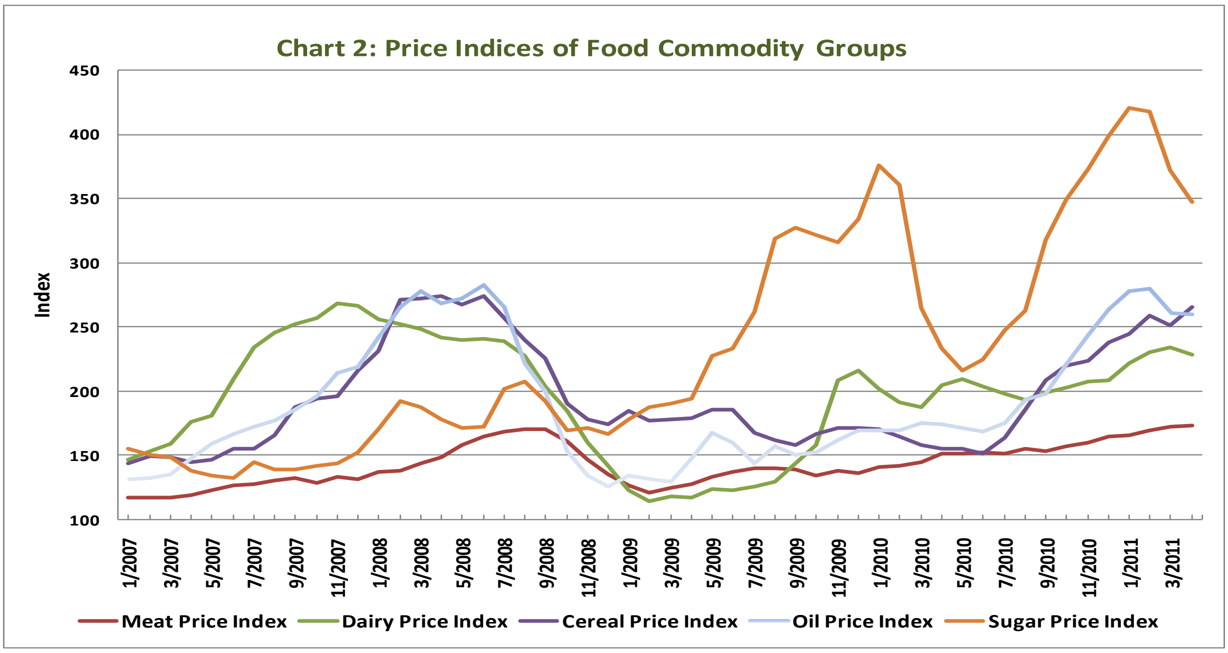


Chart 2: Price Indices of Food Commodity Groups
Index
450
400
350
300
250
200
150
100
1/2007
3/2007
5/2007
7/2007
9/2007
11/2007
1/2008
3/2008
5/2008
7/2008
9/2008
11/2008
1/2009
3/2009
5/2009
7/2009
9/2009
11/2009
1/2010
3/2010
5/2010
7/2010
9/2010
11/2010
1/2011
3/2011
Meat Price Index
Dairy Price Index
Cereal Price Index
Oil Price Index
Sugar Price Index

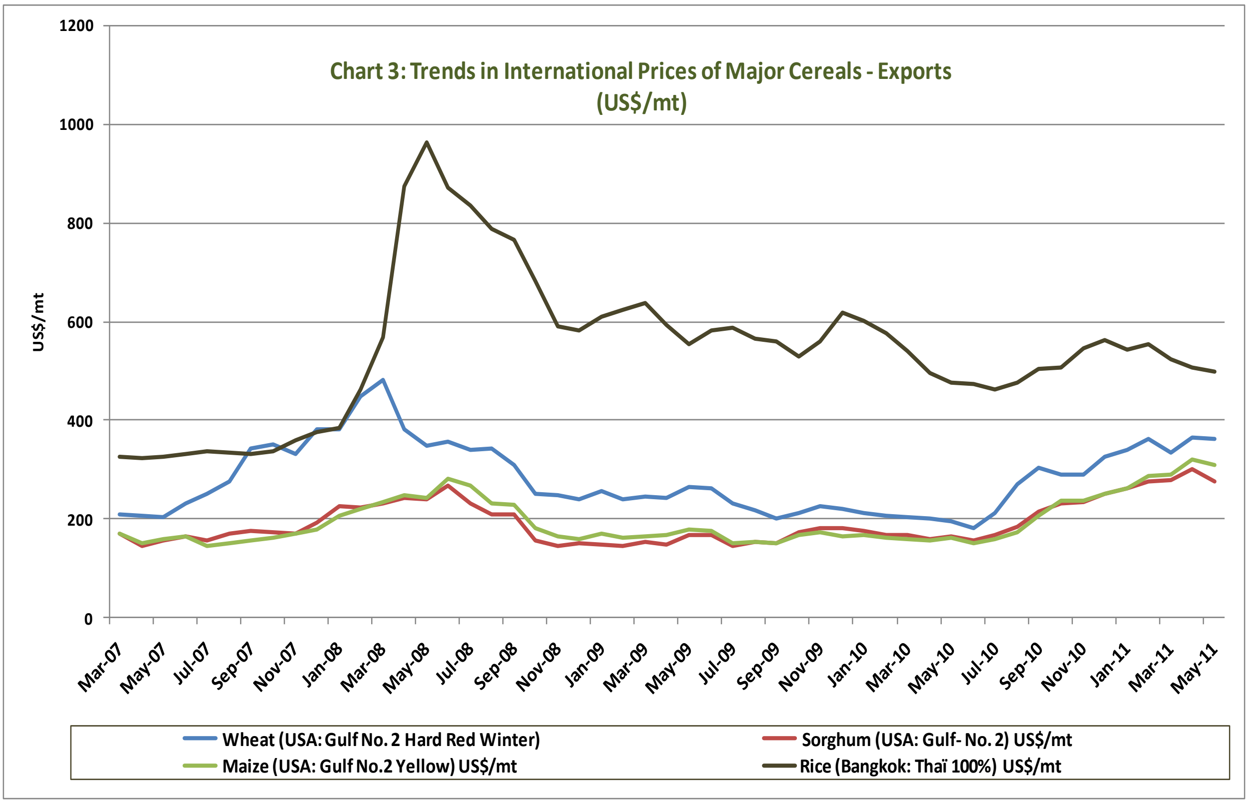
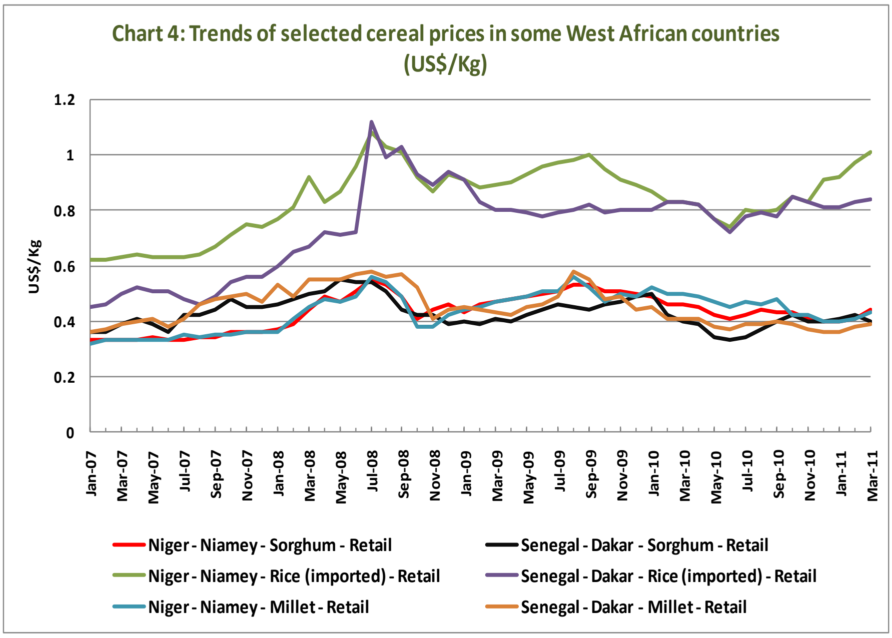
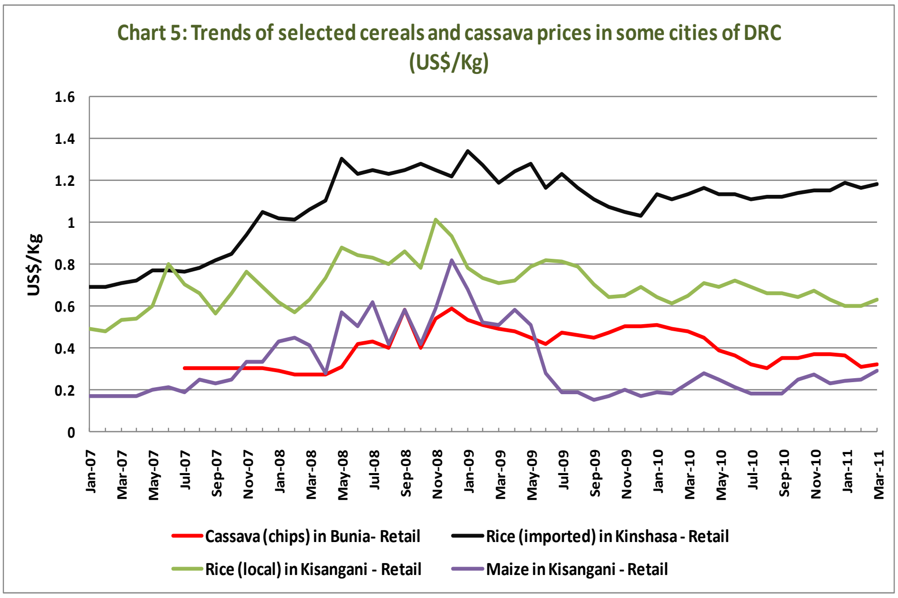


Chart 3: Trends in International Prices of Major Cereals - Exports (US$/mt)
US$/mt
1200
1000
800
600
400
200
0
Mar-07
May-07
Jul-07
Sep-07
Nov-07
Jan-08
Mar-08
May-08
Jul-08
Sep-08
Nov-08
Jan-09
Mar-09
May-09
Jul-09
Sep-09
Nov-09
Jan-10
Mar-10
May-10
Jul-10
Sep-10
Nov-10
Jan-11
Mar-11
May-11
Wheat (USA: Gulf No. 2 Hard Red Winter)
Sorghum (USA: Gulf- No. 2) US$/mt
Maize (USA: Gulf No.2 Yellow) US$/mt
Rice (Bangkok: Thaï 100%) US$/mt

1.2 Recent developments in food prices in Africa

In Western and Central Africa, the prices of produced coarse grains and other staples – for example, millet and sorghum in Senegal and Niger; maize and cassava in D.R. Congo – have remained generally depressed over the last 12 months, as illustrated in Charts 4 and 5.[7] It should be noted though that 2010 benefited from exceptionally good harvests, resulting from favorable rainfall patterns over the previous 12 months. However, the price of imported rice registered an upward trend during the same period.

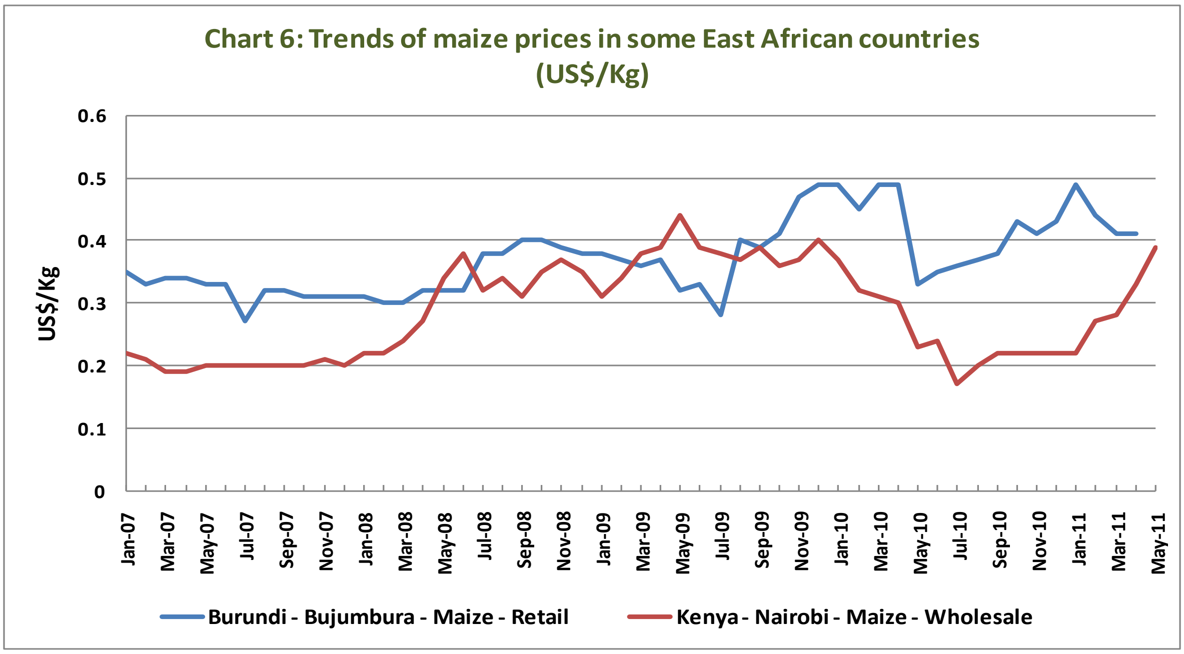


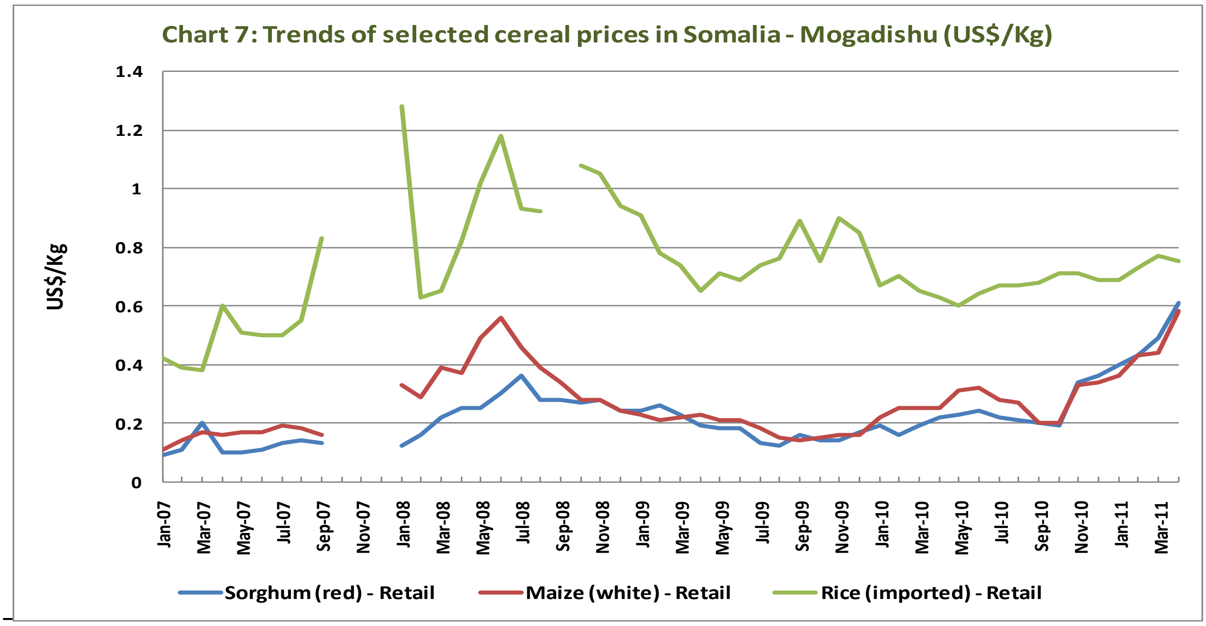


[7] Data Source: FAO (2011). *GIEWS Food Price Data and Analysis Tool* [Online] Available from:http://www.fao.org/giews/pricetool2/(Accessed: May 24, 2011).

As for Eastern and Southern Africa, prices of locally produced coarse grains have started to increase in some countries namely, Burundi, Kenya, Somalia, Mozambique, South Africa, and Zambia (see Charts 6, 7, and 8). Somalia has been particularly hard-hit, with sorghum and maize prices soaring by over 200 percent between October 2010 and April 2011 (see Chart 7).[8]

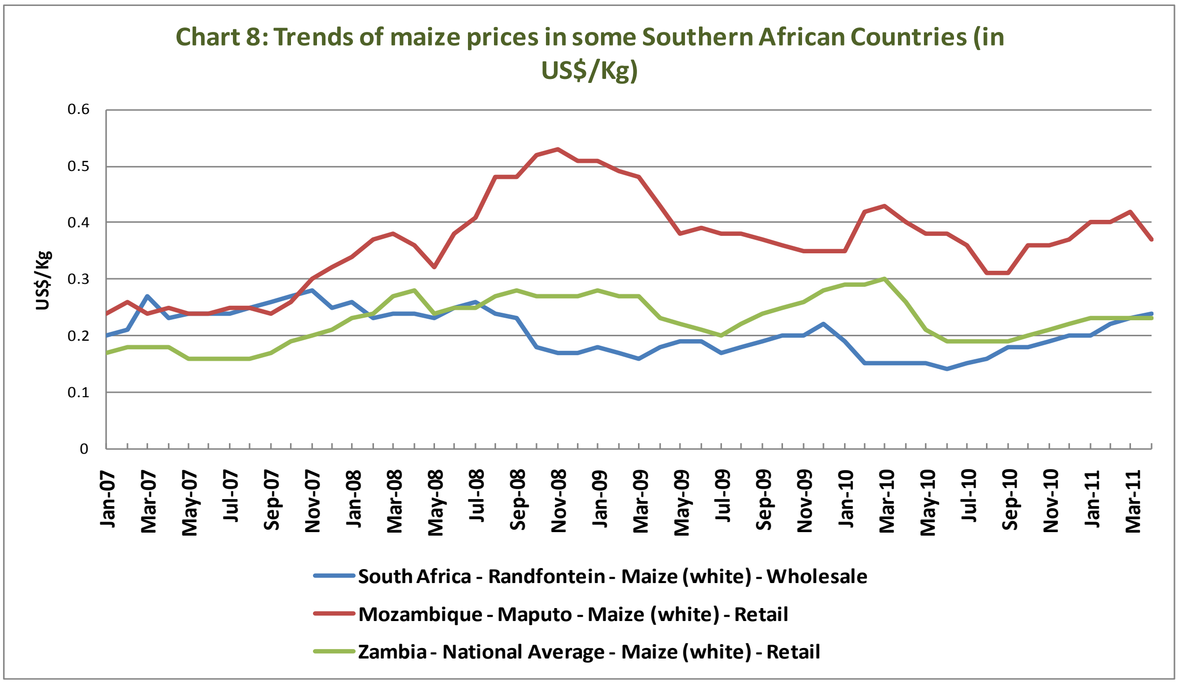
Prices of domestically produced staple foods have been relatively stable, particularly in Western and Central African countries. This has not been the case for imported commodities however, whose prices are determined in the international markets. In addition to the rising price of imported rice, there was a 40 percent increase in the local price of wheat in Nouakchott (Mauritania) in 2009/10. Likewise, rice prices went up by 14 percent in Senegal in November 2010 and by 20 percent in Niger in February 2011 from the same periods a year earlier.[9]





[8] There is no price data for sorghum and maize from October to December 2007, and for imported rice in September 2008.

[9] FAO. March 2011. *Crop Prospects and Food Situation*, N°1.



In North Africa, which is a subregion traditionally dependent on cereal imports, during 2010 aggregate wheat production dropped by 11.8 percent to 17.3 million tonnes, compared with the 2009 record harvests[10]. This was largely due to drought and erratic rains in Morocco and Tunisia. In Egypt, rice production slumped by 18 percent, owing to government policies to restrict areas under cultivation in an effort to curtail water use. Egypt is also the biggest wheat importer of the subregion (10 million tonnes in 2010), while the amounts imported by Algeria, Morocco, and Tunisia were 5.2 million, 2.3 million, and 1.4 million tonnes respectively. Cereal imports are forecast to show an increase for the 2010/11 marketing year. Consequently, rising international grain prices are a major concern for food security in countries like Egypt, which posted a 32 percent hike in nominal wheat prices in 2010.[11]

Recent civil strife in North African countries (Tunisia, Egypt, and Libya) has caused severe population displacements. For example, hundreds of thousands of people have left Libya in search of food, shelter, and alternative means of livelihood in neighboring countries. The migrations have the potential of disrupting agricultural production and trade in the host countries, further tightening the food supply/demand situation. This situation is further aggravated by the high import dependency of these countries, particularly Libya, on cereals. This, together with the hike in cereal prices in the international markets, has led to rising consumer prices and increased fiscal and current account deficits in several countries in the subregion.[12]

The drivers behind the ongoing food price inflation (more than a 70 percent increase in the international prices of major grains over the year to February 2011[13]) are similar to those that fostered the 2007/08 so-called rice price crisis.[14] First, there was a tightening in the international grain market, as extreme weather events in the 2010/11 cropping year caused significant production shortfalls in major wheat-exporting countries (floods in Canada and Australia, protracted drought in Russia), as also happened for rice-exporters in 2007/08. The second contributory factor was that of biofuels production, competing with food staples (notably maize in the US) in the demand for prime agricultural land. A third factor has been the declining US dollar and rising oil prices, which have

[10] FAO, March 2011. *Crop Prospects and Food Situation*, N°1.
[11] Ibid.

[12] FAO, March 2911. *GIEWS North Africa Brief*.
[13] FAO, March 3, 2011. *World Food Situation: FAO Cereal and Demand Brief*.
[14] IFPRI. November 2010: *Reflections on the Global Food Crisis*.

pushed up costs in the manufacturing and transportation sectors, adding to overall grain production costs. A further factor has been misguided trade practices such as panic buying and commodity price speculation. Another factor aggravating the sluggish grain supply within their own borders was the lack of resilience of many cereal import-dependent countries in Africa, plagued as they are by low agricultural productivity and deficient market-related infrastructures.

If the current spike in food prices has not yet triggered outrage worldwide, it may yet have political fallouts on the African continent. It is widely believed that this was a contributory factor behind the recent political upheavals in Tunisia and Egypt. In Algeria, food riots were only quelled after the government agreed to meet protestors' demands, which it was able to do thanks to its vast oil revenues. This should sound a warning signal to other African countries, most of which have experienced precarious to dire food security situations, notwithstanding the relatively good harvests reported in parts of the continent in 2010 thanks largely to favorable rains.

2. Undernourishment and food security/availability

2.1 One out of three people in Sub-Saharan Africa is undernourished

According to the FAO, the number of undernourished people in sub-Saharan Africa represents one-third of the population.[15] Moreover UNICEF states that 28 percent of children under five years in Sub-Saharan Africa are underweight. This constitutes a significant indicator of food insecurity. The 2010 UNDP Human Development Report points out that 34 African countries crowd the "Low Human Development" category.[16]

2.2. Good cereal harvests not translated into improved food security

Except for North Africa, which has experienced a drastic shortfall in total cereal production of about 14 percent in 2010 compared to 2009, other subregions have registered a production increase during the same period: over 11 percent in Western Africa, 3 percent in Central Africa, a massive 22.5 percent in Eastern Africa, and about 4 percent in Southern Africa.[17] However, these good harvests, essentially due to favorable rains, have not had a significant impact on the longstanding food security situation in many of these countries.

Indeed, according to FAO's classification, 43 African countries fell under the category of Low-Income-Food-Deficit-Countries (LIFDCs)[18] in 2011, in that their net food trade positions have been substantially negative for several years. This situation is reflected in the cereal supply demand balances, particularly the cereal import requirements, prepared by FAO for the 2010/11 marketing year[19] and summarized in Annex 1. It should be noted that many of the LIFDCs are also considered as fragile states (see Annex 2).

Additionally, as of March 2011, out of 29 countries worldwide requiring external assistance for food,[20] 21 are in Africa. They are confronted with different types/causes of food insecurity, but lack the resources to address them. The causes include: (i) exceptional shortfall in aggregate food production/supply (Zimbabwe); (ii) widespread lack of access to food (Eritrea, Liberia, Niger, Sierra Leone, and Somalia); and (iii) severe localized food insecurity (Benin, Burundi, CAR, Chad, Congo Republic, Côte d'Ivoire, DRC, Ethiopia, Guinea, Kenya, Madagascar, Malawi, Mozambique, Sudan, and Uganda). Many of these countries are also severely affected by high food and fuel prices. They include countries which are large net importers of cereals and fuels (therefore vulnerable to high international food prices), with generally low per capita incomes, and relatively high levels of malnutrition. It is believed that the situation may worsen in Kenya, Madagascar, and Somalia where unfavorable crop prospects are currently prevailing. Lesotho and Tanzania are also facing the same problem and may join the list of countries requiring external assistance.

The reasons for these critical food security situations include, and not limited to: insufficient domestic production; extreme weather events such as flooding; economic constraints; high food prices and general inflation; high concen-tration/influx of refugees; civil strife and protracted conflicts inhibiting agricultural production and food distribution; slow recovery from past conflicts and food crises.

[15] FAO (2010). *The State of Food Insecurity in the World*.
[16] UNDP2010. *Human Development Report*.
[17] FAO, March 2011. *Crop Prospects and Food Situation*, N°1.
[18] FAO-GIEWS. March 2011.
[19] Ibid., November 2010.
[20] Ibid., March 2011. *Crop Prospects and Food Situation*, No.1.

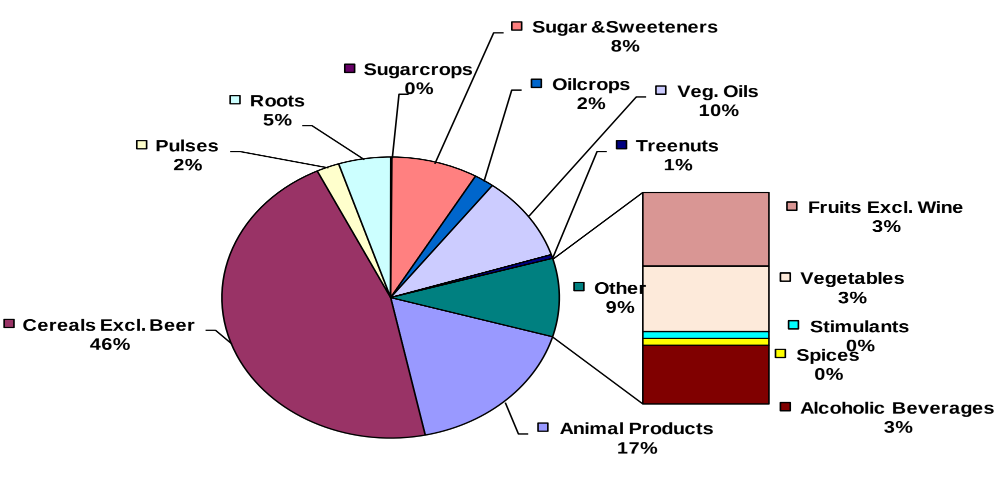
2.3. Non-cereal staples are important complementary food items

The contribution of cereals to human diet is important (about 50 percent of total calories/per capita/day), as shown in Chart 9. Their universal tradability and availability of related data make them more accessible in dealing with food emergencies and food supply-demand analysis. However, non-cereal food staples, notably roots and tubers (cassava, yams, and potatoes) and fruit-like starchy crops such as plantain also make up also a significant calorie intake in some Sub-Saharan African countries. In East, Central and Western Africa, this contribution ranges from about 20 to 40 percent in average calorie consumption per person per day. But with the exception of cassava,[21] research on non-cereal food crops has generally been neglected in Sub-Saharan Africa. This helps account for the low yields and high post-harvest losses that still characterize them. This significantly constrains their contribution to the enhancement of national food security.

2.4. A significant portion of cereal food consumption is imported

As previously mentioned, in 2010 there was a 5.7 percent increase in cereal production in Africa, essentially attributable to favorable rainfall patterns, which exerted a downward pressure on grain prices in many countries. Nonetheless, food losses and associated meagre carry-over stocks as well as climatic vagaries and the continuing rise in international grain prices are likely to dampen its beneficial effects in the 2010/11 marketing year. In particular, the increase in the cereal import bill in the African LIFDCs is forecast to reach 15 percent in 2010/11, despite reduced or moderate increases in the 2010/11 anticipated import requirements.[22] And, as mentioned previously concerning wheat and rice, the price rise in international markets is already being reflected in domestic prices in some African countries. This affects more significantly countries where cereal import/consumption ratios often exceed 50 percent (see Annex 1).

Chart 9: Food consumption (per capita/per day), by commodity groups, 2007



21 Research carried out by the International Institute of Tropical Agriculture (IITA) in Ibadan, Nigeria.

22 FAO, March 2011. *Crop Prospects and Food Situation*, No. 1.

3. *Addressing food security issues in African Countries*

The recent international food price surge – the second in less than two years – and recurrent or chronic food crises experienced by many regional member countries (RMCs), have led them and their development partners to adopt two broad strategies to address food security problems:

- **Humanitarian food assistance to save lives and maintain or restore livelihoods in emergency situations.** This involves the provision of food rations to the most vulnerable segments of the population – IDPs (Internally Displaced Persons), refugees, returnees, undernourished children, and women-headed households. Moreover, distribution of free or subsidized inputs such as seeds and simple agricultural implements for short-term food crop production is generally needed as a booster for food assistance outcomes. The implementation of this component is usually spearheaded by the World Food Program (WFP) in association with FAO for food production aspects, as well as NGOs. All RMCs listed as fragile states, and those requiring food assistance for 2010/11 are benefiting in varying degrees from this category of measures. It should also be noted that in some North African countries such as Egypt, imported wheat for making bread has been subsidized by the government for a number of years.

- **Reconstruction and development programs featuring food security with varying degrees of emphasis. This** includes Poverty Reduction Strategy Papers (PRSPs) adopted by many RMCs since 2000, other policy documents such as the United Nations Development Assistance Framework (UNDAF), the World Bank Country Assistance Strategy (CAS), and National Programs for Food Security (NPFS) prepared with FAO support. These programs are generally constrained by funding problems, which limit their outreach and impact. Hence the persistence of severe food security situations described in previous sections. But commendable efforts have been made in countries such as Sierra Leone, which has launched its US$ 403 million, five-year multi-donor Smallholder Commercialization Program,[23] or Kenya where an ambitious National Program for Food Security (2005–2015) is also supported by the UN System and other development partners.[24] Often, funding agencies (WB, AfDB, IFAD, the EU, and some bilateral donors) target specific subregions or commodities in a given country where intended food security outcomes are most needed. The Democratic Republic of the Congo is one of the countries to have benefited from such programs in recent years.

[23] FAO Media Centre, April 2011.
[24] FAO, *Country Brief –Kenya*.

4. Conclusion and recommendations

The global food crises experienced in 2007/08 and more recently have brought to light the fragility or lack of food security experienced by significant segments of the populations in many African countries, particularly fragile states.

4.1 Summary of the causes of the crisis

The food crises have witnessed spikes in international food prices pushing up domestic prices, and severe droughts or floods in some countries, causing drastic production shortfalls and associated high domestic food prices. This has had a devastating impact on the food security situation of the most vulnerable households. This underscores the lack of resilience of the African agriculture sector, which in most RMCs is characterized by rain-dependency, low-inputs, and low productivity with deficient market-related infrastructures. These conditions are exacerbated in some countries by recurrent or protracted civil strife and migrations of population, which have serious negative impacts on agricultural production and trade.

4.2 Proposals to address and mitigate the crisis

It is widely acknowledged that there can be no universal panacea for solving food security problems, since the severity of the situations and the causes vary widely across individual countries. Nonetheless, the following strategic approaches and broad actions are proposed to revamp and/or expand the activities and programs discussed in Section 3 above.

- **In the short term:**
  - Strengthen the capacity to closely monitor the food security situation in each of the RMCs to allow for informed decision-making aimed at solving food supply/access problems. This includes the collection, analysis, and dissemination of food security information (trends in production and prices of major food items, events and policies impacting food supply/access). In this regard, the setting up of observatories for specific crops, such as that established for rice in Madagascar, should be encouraged.
  - Boost sensitization among the different stakeholders in RMCs on the dangers but also on the potential opportunities that high food prices entail. This should include the holding of forums on specific staple food value chains, whereby constraints relating to production/availability and access would be identified, and measures to address them adapted.
  - Provide budgetary support to RMCs (mostly the LIFDCs) experiencing (potentially) large fiscal and current account deficits, to allow for the revamping of food safety-nets for the most vulnerable; the scrapping/easing of food import restriction, import duties and other taxes where applicable; the scaling-up of provision of subsidized inputs and related services to smallholder farmers in areas most affected by food insecurity. In addition, appropriate international forums should be used to urge the major food-producing and food-exporting countries to observe more transparency relating to food stocks and to avoid imposing export bans that may fuel speculation.

- **In the medium to long term**:

  Support RMCs in the design and implementation of national food security programs aimed at promoting the production of major food crops along value chain strategies, while supporting alternative income-generating activities in the rural areas to prop up the purchasing power of the poorest segments of the population and their economic assess to food. This means:

  - Stepping up investment in African agriculture along the lines of the 2002 Maputo Declaration to devote at least 10 percent of national budgets to the sector, particularly research, advisory services, and market-related infrastructures;
  - Fighting for the removal of subsidies to agriculture and other trade impediments applied by developed countries that protect their farming communities, and promoting intra-continental food trade.

Annex 1: Selected food security and poverty indicators for African countries (2010/11)

Country	Total cereal import requirements (000s tonnes) 2010/11	Ratio import/ consump-tion (%) for cereals	Per capita cereal consump-tion (kg/year)	Current account balance/ GDP (2010)	Fiscal balance/ GDP (210)	Global Hunger Index (2010)	HDI (2010)	Rank in HDI (169 coun-tries)
AFRICA	**...**	**...**	**...**	**0.5**	**-1.8**	**...**	**...**	**...**
Algeria	...	62	230	5.5	-4.4	...	...	...
Angola	...	36	96	1.0	7.3	27.2	0.403	146
Benin	86	21	110	-7.1	-2.6	17.1	0.435	110
Botswana	...	98	157	1.5	-11.1	12.5	...	...
Burkina Faso	330	...	...	-2.7	-4.5	21.1	0.305	161
Burundi	150	32	44	-9.4	-3.2	38.3	0.282	166
Cameroon	772	33	89	-3.6	-0.9	17.6	0.460	131
Cape Verde	...	91	152	-18.4	-13.7	...	0.534	118
Central African Rep.	62	24	51	-9.9	-0.3	27.4	0.315	159
Chad	161	...	...	-11.3	-12.5	30.9	0.295	163
Comoros	53	78	95	-10.2	4.1	27.9	0.420	140
Congo Dem. Rep.	715	32	28	-14.3	-2.8	41.0	0.239	168
Congo Rep. of	330	94	82	-2.6	13.9	15.2	0.489	126
Côte d'Ivoire	1,340	53	110	5.9	-2.5	14.0	0.397	149
Djibouti	92	97	103	-9.1	-2.7	23.5	0.402	147
Egypt	15,625	44	265	-2.0	-8.1	...	0.620	101
Equatorial Guinea	...	100	44	1.3	1.5	...	0.538	117
Eritrea	337	54	133	-1.4	-14.6	35.7	...	...
Ethiopia	821	...	...	-6.6	-2.3	29.8	0.328	157
Gabon	...	84	128	14.3	3.7	6.4	0.648	93
Gambia, The	96	37	182	-12.2	-2.7	18.5	0.390	151
Ghana	780	25	94	-7.6	-7.9	10.0	0.467	130
Guinea	497	19	203	-8.3	-12.0	17.1	0.340	156
Guinea-Bissau	124	40	140	-5.6	-0.2	22.6	0.284	164
Kenya	1208	22	126	-7.8	-5.8	19.8	0.470	128
Lesotho	216	63	155	-5.6	-2.7	12.2	0.427	141
Liberia	334	64	120	-40.9	1.3	24.3	0.300	162
Libya	...	92	238	28.4	20.9	...	...	53
Madagascar	218	...	...	-17.0	-1.6	28.1	0.435	135

Country	Total cereal import requirements (000s tonnes) 2010/11	Ratio import/ consump-tion (%) for cereals	Per capita cereal consump-tion (kg/year)	Current account balance/ GDP (2010)	Fiscal balance/ GDP (210)	Global Hunger Index (2010)	HDI (2010)	Rank in HDI (169 coun-tries)
Malawi	127	...	...	1.1	-1.1	18.2	0.385	153
Mali	207	...	...	-8.8	-4.1	19.1	0.309	160
Mauritania	489	74	168	-8.8	-3.7	13.1	0.433	136
Mauritius	...	...	...	-7.9	-4.7	6.7	...	...
Morocco	...	45	265	4.9	-2.1	5.8	0.567	114
Mozambique	729	24	116	-12.1	-3.7	23.7	0.284	165
Namibia	...	56	152	-2.9	-3.0	13.6	0.606	105
Niger	359	...	...	-18.1	-3.2	25.9	0.261	167
Nigeria	5,720	19	146	10.4	6.8	17.8	0.423	142
Rwanda	110	20	66	-6.6	-0.5	23.1	0.385	152
São Tomé & Príncipe	18	92	97	-28.1	-7.7	...	0.488	127
Senegal	1,146	39	179	-9.2	-6.3	16.8	0.411	144
Seychelles	...	...	...	-33.2	3.2	...	...	...
Sierra Leone	160	16	101	-10.4	-5.1	28.9	0.317	158
Somalia	428	60	84	...	...	...	...	...
South Africa	...	...	...	-3.2	-6.9	7.3	0.597	...
Sudan	2,021	26	155	-8.3	-2.1	20.9	...	...
Swaziland	...	71	145	-16.6	-6.7	...	0.498	121
Tanzania	720	...	...	-10.3	-5.4	20.7	0.398	148
Togo	82	...	...	-6.8	-5.8	22.4	0.428	139
Tunisia	...	69	228	-4.7	-2.6	...	...	...
Uganda	235	...	...	-9.0	-1.8	15.0	0.422	143
Zambia	29	...	...	-1.5	-3.1	24.9	0.395	150
Zimbabwe	405	20	151	-19.9	-1.7	20.9	0.140	169

Data sources:

- Total cereal import requirements are from FAO *Crop Prospects and Food Situation* No.1, March 2011 and FAO-GIEWS Cereal Supply/Demand Balance Sheets;
- The ratios of cereal imports to total consumption are from FAO *Global Food Price Monitor*, March 3, 2011;
- Current accounts and fiscal balances are from the AfDB database; *The Human Development Index* (HDI) and country rankings are from the UNDP *Human Development Report* released on November 14, 2010.

Key: (...) No data available.

Annex 2: Food security situation in fragile states

The food security situation prevailing in each of the 17 states considered by AfDB as fragile can summarized as following. (The HDI, GHI scores and other indicators cited below are given in Annex 1, preceding.)

- **Burundi**. According to the FAO,[25] 4.9 million people or 63 percent of the population are undernourished, with 40 percent of children under five recorded as underweight. Burundi's score of 38.3 for the 2010 Global Hunger Index (GHI) is rated as "extremely alarming." Its HDI score for 2010 was 0.282, ranking 166th out of the total 169 countries. Burundi is listed by the FAO among the LIFDCs (Low-Income-Food-Deficit Countries) requiring food assistance in 2010/11, due in large part to poor 2010 harvests in the north and northeast of the country. From 1990 to 2007, its undernourishment prevalence increased from 44 percent to 62 percent. Cereal import requirements for 2010/11 are estimated at 150,000 tonnes, or 32 percent of total cereal consumption. Owing to insufficient rainfall in September and October 2010, crop prospects for the 2011 season are not promising.

- **Central African Republic (CAR).** The country scored 0.315 in the 2010 HDI, ranking 159th out of a total of 169 countries. Its GHI was 27.5, a level deemed "alarming." Owing in large part to persistent insecurity that hinders agricultural production and trade, CAR is classified as an LIFDC requiring assistance for food in 2010/11. In 2005–07, about 40 percent of the population was undernourished. Its cereal import requirements for 2010/11 are estimated at 62,000 tonnes, or about 24 percent of its total cereal consumption. Overall rainfall was adequate for crop development in 2010, but protracted civil strife hampers agricultural recovery.

- **Congo (Republic of).** Persisting sporadic violence in the country is still hampering agricultural recovery. Cereal import requirements are estimated at 330,000 tonnes in 2010/11, representing about 94 percent of total consumption. The 2010 current account deficit was -2.6 percent of GDP, but with a healthier fiscal balance of 13.9 percent of GDP, thanks to abundant oil revenues. The GHI for 2010 was 15.2 and the HDI 0.489 with a 126th ranking out of 169 countries. Given its vast oil resources, the country could certainly have enjoyed a better economic performance. It shelters more than 100,000 refugees coming mostly from the Democratic Republic of Congo since 2009, who require assistance in food aid.

- **Democratic Rep. of Congo (DRC).** DRC's current account and fiscal balances were in negative territory in 2010, at respectively -14.3 percent and -2.8 percent of GDP. The country posted the worst score (41.0) on the 2010 GHI and 0.239 on the HDI, ranking 168th out of 169 countries. As mentioned earlier in the Brief (cf. chart 5), prices of major staples (maize and cassava) were reasonably stable with some downward pressure in 2010, but imported rice prices have been trending upward since about July 2010. DRC is classified by the FAO as an LIFDC and is listed among those countries requiring food assistance in 2010/11. Despite its abundant natural resources, the DRC will need to import about 715,000 tonnes of cereals in 2010/11, or 32 percent of its total cereal consumption. From 1990–2007, its undernourishment prevalence rose from 26 percent to 70 percent. IDPs and returnees remain major food security concerns.

- **Djibouti.** It's mostly desert land and protracted droughts limit agricultural production to only some vegetables and fruits. The economy is largely dependent on the country's port, an essential outlet for neighboring land-locked Ethiopia. Its 2010 current account and fiscal balances stood at -9.1 percent

[25] FAO-GIEWS Country Brief – Burundi.

and -2.7 percent of GDP respectively, while its GHI was 23.5 (“alarming”) and its HDI 0.402 with a ranking of 147th out of 169 countries. Djibouti is listed by FAO as an LIFDC; its 2010/11 cereal import requirements are estimated at 92,000 tonnes, or 97 percent of its total cereal consumption. High international cereal prices and deficient rains in 2010 will negatively impact livelihoods in the countryside and urban households alike during the 2010/11 marketing year.

- **Eritrea.** According to the FAO, 64 percent of the country’s population (estimated at 4.5 million) is undernourished.[26] FAO has also listed Eritrea among the LIFDCs requiring food assistance in 2010/11, because of “high levels of food insecurity due to economic constraints and internal displacement of population.” Cereal import requirements for 2010/11 are estimated at 337,000 tonnes, representing 54 percent of total cereal consumption. The country’s 2010 GHI score is 35.7, i.e. “extremely alarming.” This is exacerbated by a 40 percent ratio of underweight children. The high 2010 fiscal deficit (-14.6 percent of GDP) reflects the weakness of state institutions and associated ineffective governance, and hence the government’s inability to meet the food needs of the impoverished population. In this regard, even favorable crop prospects for 2010/11 will do little to mitigate food insecurity in Eritrea.

- **Guinea.** Natural disasters such as flooding, wildfires, and locust invasion have at times exacerbated food insecurity in the country.[27] Guinea’s 2010 GHI and HDI were respectively 17.1 (rated “serious”) and 0.340 with a 156th ranking out of 169 countries, despite its vast mineral resources and agricultural potential. Large current account and fiscal deficits (respectively -8.3 percent and -12.0 percent of GDP) for 2010 are symptomatic of the shattered economy that the new government is attempting to rebuild. The FAO considers that rising cereal prices since 2008, fueled by the depreciation of the Guinea franc, have exacerbated food insecurity for the most vulnerable, with over 1.7 million people undernourished.[28] For them, the 2010 overall cereal production, up by 7 percent compared to the 2009 harvests, is of little solace. The country’s cereal import requirements for 2010/11 are estimated at 497,000 tonnes or 19 percent of total cereal consumption, which is quite challenging for the government in a situation of scarce foreign reserves and near state bankruptcy.

- **Guinea-Bissau.** This is one the poorest countries, with an HDI of 0.284 and a ranking of 164th out of 169 countries in 2010. The GHI was 22.6, rated as “alarming.” Cereal import requirements are estimated at 124,000 tonnes for 2010/2011 or 40 percent of total cereal consumption, a huge challenge if international cereal prices remain high. The country’s current account and fiscal deficits stood at -5.6 percent and -0.2 percent of GDP respectively. Cashew nuts are the main source of farmers’ income and foreign exchange. Thanks to favorable rainfall and increased government support, cereal production increased by 14 percent to 237,000 tonnes in 2010. However, the food security situation in 2010/11 will depend on trends in international cereal prices and on the actions that the government decides to take to mitigate food insecurity among the most vulnerable, according to the FAO.[29]

- **Liberia.** The country’s 2010 HDI is 0.300 with a ranking of 162ndout of 169 countries, while the GHI is deemed “alarming” at 24.3. Its 2010/11 cereal import requirements are forecast at 334,000 tonnes, representing 64 percent of total cereal consumption. Despite increased overall cereal production in 2010 fostered by above-average rainfall, Liberia is listed among the countries requiring food assistance in 2010/11 largely “because of slow recovery from war-related damage, inadequate social services and infrastructure, and a massive influx of refugees from Côte d’Ivoire concentrating in the

[26]FAO-GIEWS Country Brief – Eritrea.
[27]FAO-GIEWS Country Brief – Guinea.
[28] FAO-GIEWS Country Brief – Guinea.
[29]FAO-GIEWS Country Briefs – Guinea Bissau, February 2011.

eastern counties of the country.[30] One-third of the population was estimated to be undernourished in 2005–2007.

- **Sierra Leone.** Despite steady support from the international community (led by the World Bank) to secure funding for the government's "Agenda for Change," which focuses on agriculture, energy, transport infrastructure, and good governance, the country remains one of the poorest in Africa.[31] Its 2010 HDI is 0.317 with a ranking of 158thout of 169 countries, while the GHI stands at an alarming 28.9. Rice production has been gradually increasing, thanks largely to the expansion of the area under cultivation. Aggregate cereal production for 2010 was better than the 2009 harvests owing to favorable rains, but the cereal import requirements estimated to reach 160,000 tonnes in 2010/11. Although representing only 16 percent of total consumption, securing this amount from the international markets could prove difficult in a context of high international cereal prices and tight financial resources. In this regard, the current account and fiscal deficits for 2010 were respectively -10.4 percent and -5.1 percent of GDP. Additionally, inflation spiked at about 17 percent in 2010, following a steep devaluation of the Leone (local currency). This has further constrained economic access to food which accounts for approximately 50 percent of household expenditures.[32] The undernourishment prevalence was estimated at about 35 percent of the population in 2005–2007.

- **Somalia.** In addition to conflicts, civil wars, and insecurity prevailing in the country since 1991, severe drought affected the country in 2010, causing total crop failure, particularly in the Central and Southern regions, according to the FAO.[33] Irrigated areas also suffered a production decline due to reduced river flows. The drastic supply shortfall has translated into a price spike for locally produced cereals, with sorghum prices increasing more than threefold and those of maize twofold between October 2010 and February 2011, while imported rice prices have remained relatively stable (see Chart 7). Moreover, there has been an unusual displacement of livestock and population across the country in search of pastures and alternative livelihoods. Up to 300,000 IDPs were identified in February. The FAO has assessed that about 2.4 million people are in need of food assistance in 2010/11 due to the drought and persistent armed conflicts. Cereal import requirements for 2010/11 are forecast at 428,000 tonnes or 60 percent of total consumption.

- **Sudan.** Current account and fiscal deficits were respectively -8.3 percent and -2.1 percent of GDP in 2010. Favorable rains have fostered a bumper 2010 cereal harvest in the north with 5.7 million tonnes (nearly double the 2009 production) and the south (with a 30 percent production increase[34]). But it is in the north that prices of local cereals have declined due to increased production. As for the south, prices of locally produced cereals have been increasing, driven by the large influx of refugees, lingering insecurity, and the disruption in supply chains caused by pre- and post-referendum uncertainties. Thus, food insecurity remains a major concern. The country recorded an alarming 20.9 GHI in 2010; the FAO estimates that about 6 million people are in need of food assistance due to continuing insecurity, civil strife, and large numbers of returnees in Southern Sudan. Cereal import requirements are forecast at 2.02 million tonnes for 2010/11, representing 26 percent of total consumption. In a context of high international cereal prices, this has serious consequences for the import bill, even if a large portion of it were to be picked up by the international community, through humanitarian assistance.

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[30]FAO-GIEWS Country Brief–Liberia, February 2011.
[31]World Bank, 2011. Country Brief–Sierra Leone.
[32]FAO-GIEWS Country Brief– Sierra Leone, February 2011.
[33]FAO-GIEWS Country Brief–Somalia, February 2011.
[34]FAO-GIEWS Country Brief – Sudan, February 2011.

- **Togo.** Agriculture (notably cotton, coffee, and cocoa) accounts for 40 percent of the country's export earnings. For a second year in a row, good food harvests were reported in 2010, due to the distribution of subsidized inputs and increased production of drought-resistant millet and sorghum.[35] Still, 47 percent of the rural population suffers from food insecurity and 23 percent of children under five years of age are affected by chronic malnutrition.[36] The country posted an alarming GHI of 22.4 in 2010, while the HDI was 0.428, translating into a ranking of 139thout of 169 countries. Cereal import requirements for 2010/11 were assessed at 81,500 tonnes, but with current account and fiscal deficits at -6.8 percent and -5.8 percent of GDP respectively, the import bill could prove hard to meet in the context of high international cereal prices. About 30 percent of the population was estimated to be undernourished in 2005–2007.

- **Zimbabwe.** Thanks to favorable rains and increased areas brought under cultivation (supported by an extensive input distribution program), the 2010 cereal output rose by 7 percent to 1.35 million tonnes compared with 2009.[37] If food supply has been forthcoming, lack of access to food has triggered price increases in Harare and production-deficit precincts. The 2010/11 agricultural campaign is supported by the distribution of subsidized improved seeds and fertilizers to nearly 1 million smallholder farmers. But despite the generally improving food situation, about 1.68 million people were estimated to be in need of food aid in 2010/11. The country's 2010 GHI is an alarming 20.9 and the HDI is at 0.140, which places Zimbabwe with the lowest ranking of all 169 African countries. In 2005–2007, 30 percent of the population was estimated to be undernourished. Cereal import requirements for 2010/11 are forecast at 405,000 tonnes, the lowest since 2005, but still hard to secure with current account and fiscal deficits assessed respectively at -19.9 percent and -1.7 percent of GDP for 2010.

[35]FAO-GIEWS. Country Brief –Togo, February 2011.
[36]Ibid.
[37]FAO-GIEWS. Country Brief – Zimbabwe, January 2011.