

SENEGAL Monthly Food Security Update

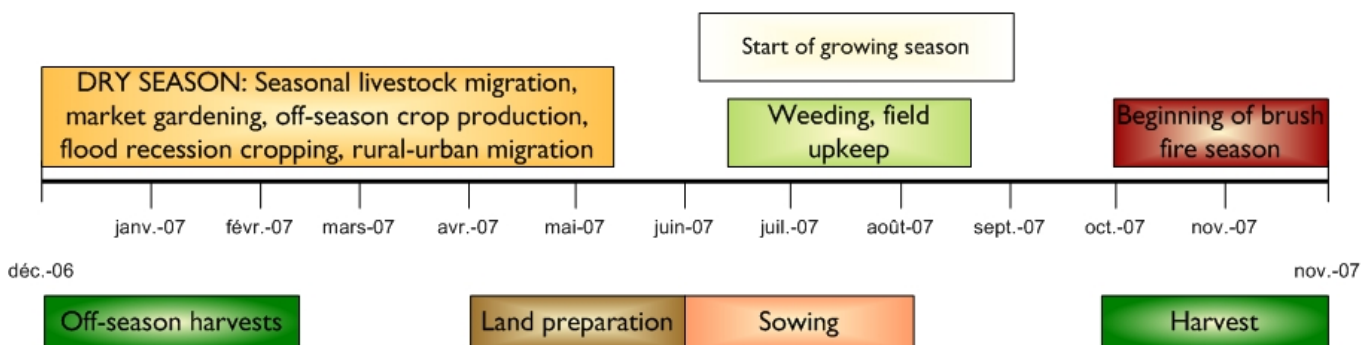
March 2007

Farming activities are virtually finished in Senegal's major crop-growing areas after an average rainfed crop and main-season rice crop harvest. This time of year is devoted to off-season activities, particularly market-gardening activities in the Dakar, Thiés, Louga and Saint-Louis regions.

Supplies of locally grown grain crops on all markets around the country have been low for more than three months, and grain prices continue to increase on most markets, except in the Saint-Louis region.

The lean period for livestock has begun in the Louga, Saint-Louis and northern Tambacounda regions. Seasonal drying of pasturelands and the destruction of pasture resources by brush fires are also prominent features of this period.

Seasonal calendar



Current food security situation

The final nationwide gross grain production figure for the 2006/07 growing season is 988,314 metric tons, which is 31 percent lower than last year (including a 10 percent decline in millet production, a 16 percent decline in sorghum production, a 55 percent decline in corn production and a 32 percent decline in rice production) and 14 percent below the five-year average. This production shortfall, as well as shortfalls in cash crop production – particularly in the Kaolack region, is attributed to the inadequacy of and delay in the provision of farm inputs and below-average to average rainfall during the season. Despite this, the food security situation in Kaolack region is satisfactory overall, except in Maka Yop district, where household income is derived almost exclusively from agricultural production, which was mediocre to extremely poor this year.

These production shortfalls, and the resultant low level of commodity transfers to deficit production areas, will affect poor agricultural households' access to locally grown grain crops. Significant rice imports are, however, buffering against some of the negative effects of these production shortfalls.

As was the case in 2006, grain supplies on local markets are expected to improve some as the groundnut marketing season ends and millet threshing activities resume. The magnitude of the current production deficit could, however, cause agricultural households to hoard grain crops, which would limit local market grain supplies even further.

Pastoral conditions are deteriorating due to brush fires and the seasonal drying of grazing land, forcing herders in the Linguère – Matam – Tambacounda triangle to begin their seasonal migration earlier than usual.

Food security in the Tambacounda region is more or less satisfactory in the West and fair to mediocre in the East and North but troubling in the rural southern community of Koulor, where approximately 90 percent of residents depend significantly on this year’s poor agricultural production as a main income source. In the Matam region, those households that are completely or highly dependent on rainfed crops are experiencing the most serious food security problems. Food security for agriculturalists and pastoralists in the northern reaches of the Louga region could also become a cause for concern in the near future with this year’s poor harvest and brush fires that have reportedly destroyed significant tracts of pasture.

The Food Security Commission (CSA) estimates the total number of food insecure people in various regions of the country to be over one million. The majority of these people are located in rural communities such as those listed in Figure 1 below. Note, however, that the population figures listed in the table represent the total population of each rural community, not the number of food insecure people in those communities.

Figure 1. Population of major food-insecure areas

Region	Department	District	Rural community	Population
Kaolack	Kaffrine	Maka Yopp	Lour Escale	16 430
			Guinthe Paté	16 800
			Ribot Escale	10 008
			Ida Mouride	26 739
Tambacounda	Bakel	Goudiry	Koulor	19 062
Matam	Ranérour	Vélingara Ferlo	Oudalaye	26 654
			Loghéré Thioly	6 316
	Matam	Agnam Civol	Dabia	19 426
			Oréfondé	14 152
			Agnam Civol	16 308
	Kanel	Orkadiéré	Ogo	47 736
			Sinthiou Banambé	50 704
			Orkadiéré	35 040
Louga	Linguère	Yang Yang	Kamb	12 738
		Barkédji	Thiargny	9 160
			Barkédji	15 635
		Dodji	Dodji	8 281
			Ouarkhokh	15 358
		Sagatta Djoloff	Sagatta Djoloff	14 646
	Thiamène Djoloff		19 243	
	Kébémér	Sagatta Gueth	Loro	8 155
			Sagatta Gueth	14 051
			Kanène Ndiob	8 478
		Ndande	Thieppe	10 818
Ndande			18 912	

Source: Senegalese Food Security Commission (CSA)

Households in food insecure areas are reportedly turning to a number of coping strategies to access food. These include: out-migration to urban areas (particularly market gardening and fishing areas) in search of income-earning opportunities to support family members back home, small-scale trade and sale of small animals and poultry. Pastoral households are reportedly migrating south in search of pasture for their animals and building grain reserves prior to their return trip north during the rainy season.

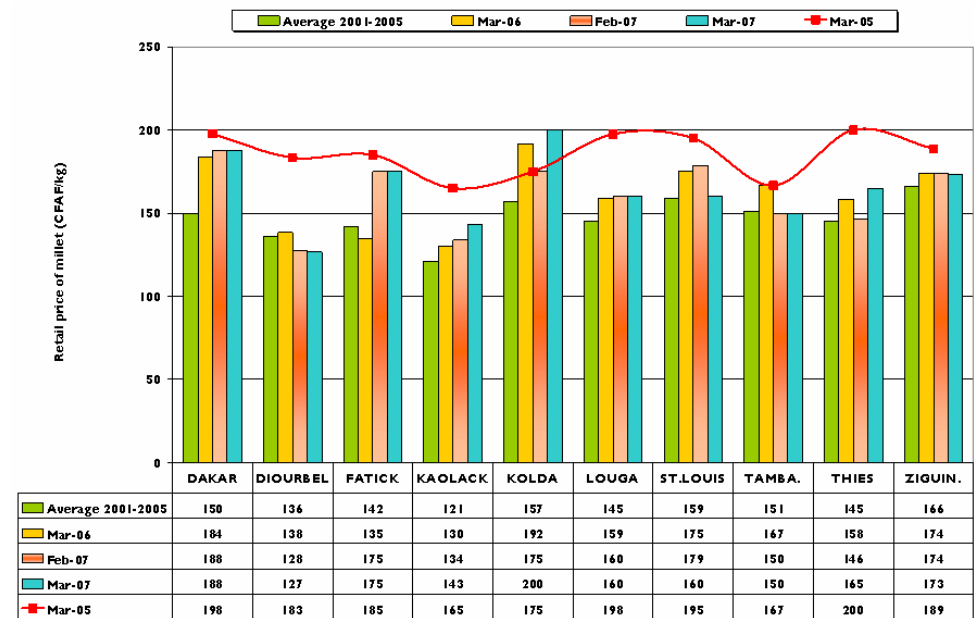
Markets

Local market supplies of millet, sorghum and corn remain low in most of the country, though a slight improvement in cereal supplies has been noted on urban markets in Dakar, Kaolack, Saint-Louis and Thiés, where demand is heaviest – particularly in Kaolack, which supplies the majority of the country’s grain – and prices are generally more lucrative for grain traders. Rural households are increasingly reliant on imported rice to make up for the shortage of coarse grains.

Prices for local grain crops have risen steadily on most urban markets for the past three months. The current average millet price is higher than last year and above the 2001-2005 average for this time period. However, prices on the Kolda and Saint-Louis markets have fluctuated since November, most likely due to fluctuations in market supply and demand.

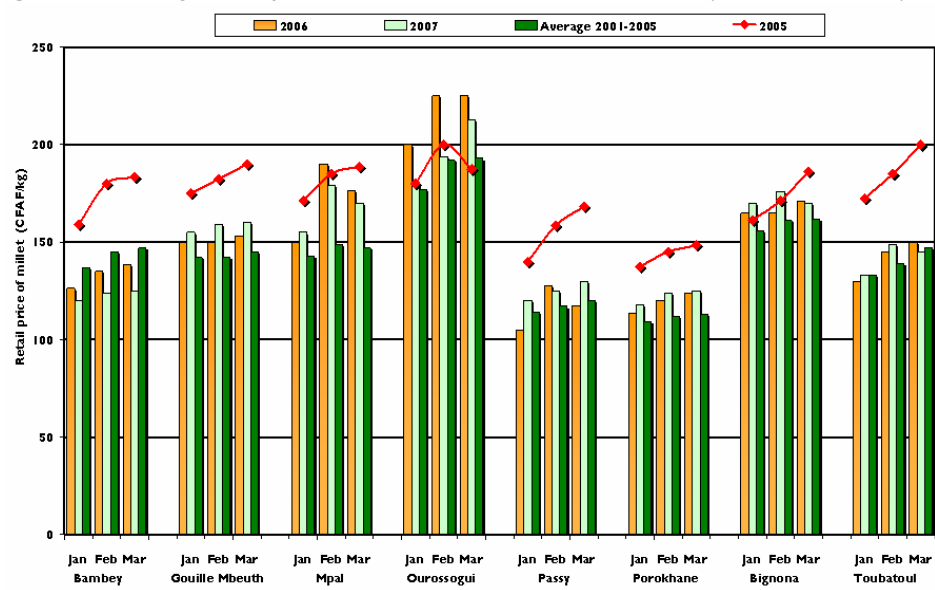
For example, millet prices in Saint-Louis dropped by 10.5 percent as market supplies increased. The situation is similar on the Diourbel and Tambacounda markets, while prices on the Kolda market, where grain supplies have dwindled, increased by 14.3 percent (Figure 2). Prices across most of the rest of the country remain below those of 2005 – which was a year of unusually high grain prices.

Figure 2. Average retail price trends for millet in regional capitals (as of March 2007)



Source of data: CSA/SIM; Graphic by FEWS NET

Figure 3. Average retail price trends for millet on rural markets (as of March 2007)



Source of data: CSA/SIM; Graphic by FEWS NET

On the whole, retail prices for millet on rural markets are rising and, in general, are running above the average for 2001-2005 (Figure 3). However, prices in Mpal and Ourosogui have dropped by 10.5 and 5.4 percent, respectively, since last month, when market supplies began to show some improvement. Despite the steady overall rise in prices on rural markets, prices for March of this year are still below figures for 2005 everywhere except in Ourosogui, but nonetheless points to grain access problems for rural households in the months ahead.

Limited grain availability and seasonal price increases suggest an increasingly tight food security situation during the upcoming lean period.