



Sahel

Crops Not Yet Established in the Sahel

The unusually early start to the rainy season in the Sahel was followed by a hiatus in mid-June (figure 1), causing a failure of the first sowings in many areas. The rains resumed in parts of Burkina Faso and southern Mali in early July, but most of the Sahel is still in need of rain to complete 1996 cereal sowing. Second and third plantings have been necessary in some areas. Rainfall through the end of July will be critical in determining whether these seedlings will survive and whether there will be a normal crop this year.

In **Mauritania**, sowing of sorghum began in mid-May in the southeast, but recent dry conditions may necessitate replanting. Preparation of irrigated rice fields began in mid-June. There has been an increase in rice planting in the Trarza Region due to the establishment of additional perimeters in the areas of Keur Macene and Tékane. Farmers assert that high fuel prices and local fertilizer shortages will affect production.

Below-normal and poorly distributed rainfall has delayed planting throughout the Mopti and

Ségou Regions of **Mali**, where sowing would normally have begun in mid-June. In many areas sowing was 2 to 3 weeks late, while in other areas it had not begun by the end of June. The poor rainfall should not affect the irrigated-rice sector, where planting can safely occur in July and early August. In the south, most stations have received more rainfall than normal.

In southern **Burkina Faso**, crop growth is progressing normally. In the central and northern parts of the country, however, sowing has been delayed. Resowing was necessary in Dori and Ouahigouya Provinces as young crops withered in many early sown fields.

Rainfall in late June was poorly distributed across the main agricultural area of **Niger**, and the many farmers who planted in early June will have to resow. Recent field reports from north of Niamey indicate that farmers in some areas have already had to plant for a third time. Only stations in the extreme south recorded rain adequate to sustain normal crop development.

Highlights:

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In contrast, the Sudanian zone of southern **Chad** had a good start to the growing season, and the area sown is expanding northward, following the seasonal pattern. The Sahelian zone, however, had patches of rain in May, which led to early planting, and these areas are now reporting poor growing conditions. In a few of these early planted areas south of N'Djaména, severe drought stress has led to desiccation of the crop.

Sahel Rainfall Through July 10, 1996

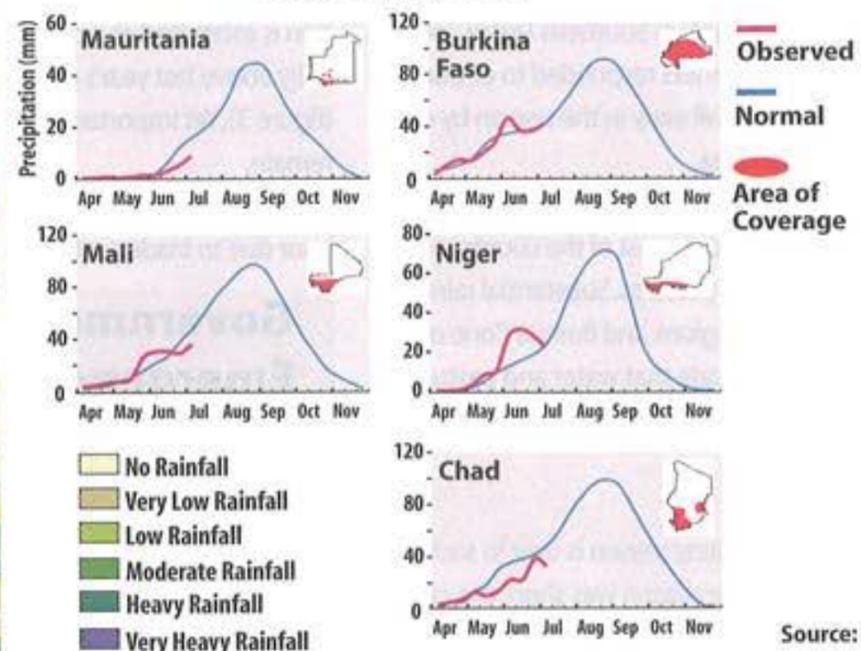
Rainfall During Dry Period, June 11-30, 1996



Return of Rains, July 1-10, 1996



Seasonal Rainfall



Source: FEWS/W
FEWS, July 1996

Figure 1

Heavy Rains in Ethiopia Cause Flooding in Somalia and Sudan

The Juba and Shabelle Rivers in Somalia and several important Nile tributaries in Sudan originate in the Ethiopian highlands (figure 2). This year, unusually heavy rains in central and southern Ethiopia have led to severe flooding in the Somali Region of that country, as well as in Sudan and Somalia.

In Sudan, the Pochalla District of Jonglei Province has experienced what has been described as the worst flooding in the past 50 years. The Akobo River overflowed its banks, inundating 12,000 km² under 1 to 2 m of water. An estimated 15,000 persons have lost access to their homes and food stocks. The floods have also destroyed crops nearly ready for harvest, and they are likely to prevent second-season planting, which would normally take place in August or September. Flooding has also occurred in Eastern Equatoria Province, in the lowland plains area between the Koss and Kidepo Rivers and along the Nile in Jonglei Province.

The Government of Sudan has prohibited nongovernmental organizations associated with Operation Lifeline Sudan from travelling to the Pochalla area, which is now reachable only by air. Norwegian People's Aid, which is not affiliated with Operation Lifeline Sudan, is attempting to fly in food and nonfood assistance, but ongoing heavy rains are hampering its efforts.

In Somalia there is heavy flooding along the Juba River, the effects of which have been accentuated by the deliberate breaching of dikes earlier in the season, when the river did not rise at the expected time. Many households have lost homes and fields to the floodwaters, which cover an area reaching as far as 3.5 km from the usual course of the river. An estimated 34,000 to 50,000 persons have been affected by the flooding.

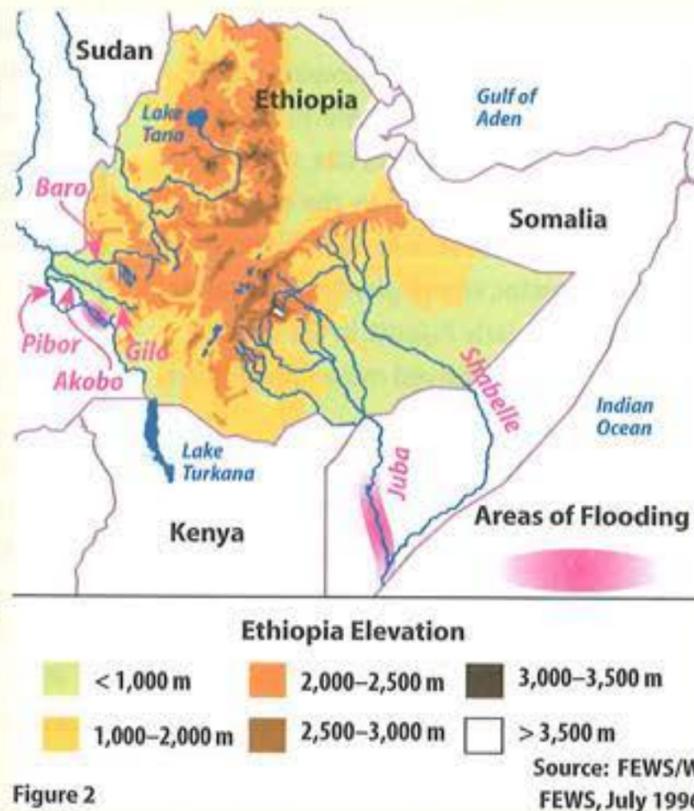


Figure 2

Source: FEWS/W
FEWS, July 1996

Ethiopia

Throughout June, heavy rains continued in most agricultural regions of Ethiopia (see box above). A Disaster Prevention and Preparedness Commission assessment team reports that while the extended rainfall has not reduced the *belg* (secondary season) crop, it has diminished the quality of the grains for consumption and as seeds for next season's planting. The 1996 national *belg* harvest could be one of the best in recent years. A production shortfall is likely in Southern Tigray Zone, however, because farmers responded to erratic and inadequate rainfall early in the season by cultivating insufficient area.

The *meher* (main season) agricultural activities have begun throughout most of the country and are following normal patterns. Substantial rainfall in Afar and Somali Regions and Borena Zone of Oromiya Region indicate that water and pasture will be more than sufficient this year.

Somalia

The 1996 *Gu* (main) rainy season is over in southern Somalia. While the season was short, the rains were well distributed. The sorghum belt of southwestern Somalia received more rain than did the

maize-growing areas in the south. Rainfall in the agricultural zones of northern Somalia exceeded normal levels, raising prospects for a good *Gu* crop. The broadly distributed good to heavy rains also helped to restore pasture conditions in the north following several seasons of poor rainfall (see the March 1996 *FEWS Special Report*).

Preliminary *Gu* harvest estimates for all of Somalia show an increase of about 30 percent over 1995 levels. Total sorghum and maize production is estimated at around 211,300 MT, substantially above last year's estimated 163,700 MT (figure 3). Yet important regional differences remain.

In the Juba Valley, *Gu* harvest prospects are poor due to inadequate rains. As reported in the

Somalia—Estimated Cereal Production

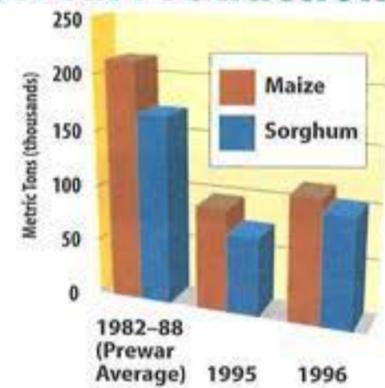


Figure 3

Source: Somalia Food Security Assessment Unit
FEWS, July 1996

June *FEWS bulletin*, these poor prospects, combined with civil insecurity, caused thousands to flee the valley in April and May. Donors and nongovernmental organizations responded with a Juba Valley Action Plan, designed to stem the exodus of the farming families and facilitate their return home. The first phase of the plan has been successful, and the number of displaced persons in Doble and Kismayo has decreased since June.

Seeds are now being distributed in Lower and Middle Juba Regions to help returnees, as well as those who did not relocate, to plant a recession crop as floodwaters subside (see box at left). In the middle Juba Valley. It will not be possible to plant a rain-fed crop until the *Deyr* season starts, in September. Vulnerable households will continue to require food assistance for the next 6 months, until *Deyr* crops can be harvested in January.

Sudan

During June, rain in southern Sudan was generally well distributed. In the main agricultural areas of Western Equatoria Province and most parts of Eastern Equatoria Province, where farmers are able to plant two crops during the long rainy season, early maize, sorghum, and groundnuts are being harvested and preparations are now under way for the second planting. Dry spells continue to affect some areas, however, and civil insecurity hampers the delivery of relief food. In Ikotos and Hiyal Payams of Eastern Equatoria, for example, nongovernmental organizations report that 26,000

Government of Sudan Lifts Ban on C-130 Emergency Flights

The United Nations reported on July 15 that the Government of Sudan has lifted its 10-month-old ban on the use of C-130 cargo planes to deliver relief food to the war-torn Province of Bahr el Ghazal (figure 4). Planes will be allowed to overfly Government-held territory through the end of the month to build up food aid stocks in the stricken Province. This is a critical period in the year, because homegrown food has dwindled throughout the Province. WFP had previously reported that over a half a million persons are faced with starvation. The United Nations hopes that the Government of Sudan will make the policy change permanent.

North Kordofan—Food Insecurity Aggravated by Barriers to Internal Trade

North Kordofan State, in northern Sudan, is experiencing severe food security problems following a very poor 1995 cereal harvest (figure 4). A recent food security assessment carried out by CARE found that many households were reducing the number and size of meals beyond usual seasonal patterns. Households in this area typically reduce the number of meals from three to two per day at this time of year. This year, more than a quarter of the households surveyed indicated that they now consume only one meal per day. Outmigration during the off-season is an annual occurrence, but this year more people than usual left, and they left earlier.

This is an example of a situation where food insecurity is caused as much by a lack of economic integration as by unfavorable agricultural conditions. Cereals are available for purchase in the sorghum surplus areas in central and eastern Sudan, although prices exceed the means of many

persons who are dependent on food aid have been cut off due to bad roads and rebel activity in northern Uganda. Nongovernmental organizations report the need for an assessment of the relief requirements of 15,000 persons in Tukubak Payam in Eastern Equatoria, where spotty rains have caused crops to wilt.

Just to the north, in Jonglei, Upper Nile, and Bahr el Ghazal Provinces (figure 4), crops were planted late and there is only one growing season. Crops in Jonglei are doing well, but a dry spell has wilted crops in Bahr el Ghazal and western Upper Nile. If rains do not return in July, there will be no harvest in some areas.



Kenya

A midseason preliminary estimate prepared by the Kenyan Ministry of Agriculture projects national long-rains maize production at 2.07 million MT. This year's long-rains production level would be 10 percent less than last year's and 21 percent below the bumper long-rains harvest of 1994, but still above levels recorded in the poor production years of 1992 and 1993.

Production estimates by Province (figure 5)

households in the affected area. Obstacles to increased internal trade include administrative restrictions on the movement of cereals and heavy local and road taxes (which account for as much as 43 percent of the consumer price in some areas).

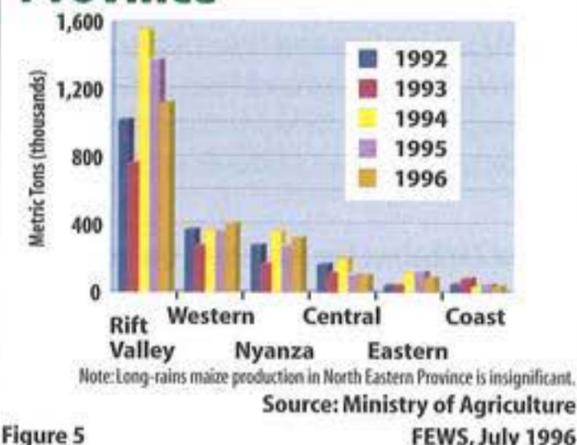
Estimated food needs of 60,000 MT cannot be met from the food stocks held in the region by United Nations organizations and nongovernmental organizations, and food cannot be brought in from outside the region in time to prevent residents from leaving their farms before the planting season. Purchasing food within Sudan would speed delivery and reduce the amount of assistance required by forestalling additional outmigration before the planting season. A timely start to the rainy season, in September, would also help to bring prices down and encourage farmers to remain in the area for the agricultural season.

show that most of the reduction in national production can be attributed to the expected poor harvest in Rift Valley Province. Production in Rift Valley's four main surplus districts, which normally account for more than one-third of total long-rains production and half of the marketable long-rains surplus, will be down sharply due to a reduction in area planted and low yields.

In June, maize prices continued to rise across the country. The rate of increase in Central and Eastern Provinces slowed somewhat after sharp increases in May. Prices in Eastern Province could stabilize or fall in late July, with the onset of the long-rains harvest in neighboring Central Province; however, sustained decreases are not anticipated, given the poor harvest prospects in parts of the two Provinces. Prices in most markets across the country are 25 to 30 percent higher than at the same time last year.

In the arid districts, unseasonable rains fell in many areas at the end of May and in the first 20 days of June, leading to a significant improvement in pasture conditions in Turkana, Samburu, and part of Marsabit in northwestern Kenya. Little

Kenya—Long-Rains Maize Production by Province



rain fell in drought-stricken Isiolo District, but rains in Central Province filled the Ewaso Ngiro River and flooded the dry-season grazing areas in the Lorian Swamps of Isiolo. North Eastern Province remained dry in June, and livestock conditions are deteriorating in many places.

Tanzania

Seasonably dry conditions prevailed in most of Tanzania in June. The Lake Victoria zone and the western Regions have completed the long-rains harvest, while harvesting is still in progress in the southern and eastern Regions. Preliminary production forecasts indicate that Tanzania will achieve self-sufficiency in all major crops except wheat.

Bolstered by a good harvest, the food security situation across most of the country is good. Even the chronically food-deficit islands of Zanzibar and Pemba expect bumper clove harvests, which should improve the incomes of producers and wage earners in the clove industry. Farmers in Mara Region, however, may experience food access problems this year. They increased the area planted to cotton at the expense of food crops this season in anticipation of higher cotton prices; however, cotton prices are 20 percent lower than they were last year. A new influx of refugees from Burundi may lead to a deterioration in the food situation in the chronically food-deficit Kigoma Region. FEWS will assess the situation in Kigoma and Kagera Regions in July.

Southern Africa

Zimbabwe

Several districts in the central and eastern parts of Zimbabwe received unseasonable rainfall in late May and mid-June, which slowed the drying of maize and curtailed sales. At the national level, Grain Marketing Board purchases of local maize production are substantially lower than at the same point in 1994 and 1995.

Most of the Grain Marketing Board purchases have been from commercial farmers with access to

mechanized drying facilities. The low level of purchases also reflects the board's difficulties in competing with the private sector in a newly liberalized marketing environment. There are now many private-sector buyers of maize, who ordinarily offer payment upon delivery, whereas the board pays several weeks after the grain is delivered.

The price of maize continues to fall at the wholesale and retail levels, while the farmgate price has remained relatively stable. The Govern-

NDVI Problems

During May and June, FEWS noticed problems with the Normalized Difference Vegetation Index (NDVI) satellite images, which are used to monitor vegetation density and health. The problems included visible stripes in the images and an apparent shift in the "greenness" of the observations.

NASA is giving the problem highest priority and investigating whether the effects seen in the imagery are sensor related or can be attributed to a different source. Once the problem is identified, a correction will be developed. Currently, the NDVI images are not usable for detecting improvement or deterioration of vegetation or for comparisons with averages. Until the problem is solved, satellite-derived rainfall images will be used to supplement field observations.

ment of Zimbabwe has authorized the export of 250,000 MT of maize, which should boost producer prices. The total amount of exportable surplus will depend on the Government's target level for the Strategic Grain Reserve. There are indications that the reserve may be supplemented by a special import finance facility, which would tend to reduce the level of stocks that must be kept on hand.

According to the Ministry of Local Government, which administered the Grain Loan Program, pledges have been received for the repayment of 172,000 MT of the 343,000 MT distributed under the program. Some farmers whose grain stocks are low have reportedly agreed to repay their loans in cash.

Zambia

Zambia's Ministry of Agriculture, Forestry and Fisheries has released its final crop forecast. Estimated cereal production, while still above average, is below earlier projections, reflecting the effects of pests and of rainfall during the harvesting period. The estimate of maize production now stands at 1.41 million MT. About 47 percent of this total is expected to be marketed, the remainder being retained for household consumption or for later sale. Many farmers are expected to withhold some maize from the market in anticipation of increased prices later in the year.

As reported in the June 1996 *FEWS bulletin*, per-

mits are being issued, through a quota system, for the export of both whole-grain maize and meal. Applications must include documentation of actual export orders. Preference is being given to exports of meal as opposed to grain, in order to maximize the amount of local value added in the exports.

The wholesale price of maize in public markets appears to have stabilized. Prices in June ranged from ZK 7,200 per 90-kg sack in Choma (in Southern Province) to ZK 14,000 per sack in Ndola (in Copperbelt Province)—only slightly below the prices reported in May. The price of industrially processed meal continues to fall. During June, many millers announced price reductions, averaging around 8 percent. This trend is expected to continue as maize meal imported from South Africa becomes available on local markets, at a price about 30 percent below that for locally produced meal, further increasing the competitive pressures faced by the industrial millers, who have already lost much of their market share to the hammermill operators.

Malawi

As the harvest continues across Malawi, both household food stocks and market supplies are plentiful. Private traders are buying maize, rice, tobacco, and pulses. Prices paid to producers for maize range from MK 1.25 to MK 1.90 per kilogram. These prices are significantly higher than last

year's, leading to nominal income gains for maize producers. Prices paid for secondary crops, on the other hand, are lower than last year's as a result of record production levels for secondary crops this year. For example, soybean prices are more than 60 percent lower, partly as a result of excellent soybean production in South Africa, the main export market for Malawi soybeans.

The Agricultural Development and Marketing Corporation (ADMARC) opened its buying centers on June 21 and is purchasing maize at MK 1.55 per kilogram. ADMARC has set its maize purchase target for the 1996/97 marketing year at 130,000 MT. This total includes the 20,000 MT the European Union commissioned ADMARC to purchase to replenish the Strategic Grain Reserve and another 37,000-MT ADMARC bid in response to the USAID tender for 60,000 MT of maize destined for the Strategic Grain Reserve. To ensure that ADMARC has adequate funds to finance up to 80,000 MT of non-donor-sponsored maize purchases, the Government of Malawi is acting as guarantor for ADMARC to obtain up to MK 150 million in credit from commercial banks.

The national average consumer maize price rose slightly between May and June, to MK 1.98 per kilogram. Consumer maize prices are 30 percent higher than at the same time last year, reflecting the inflation Malawi has experienced since the devaluation of the kwacha in 1994. Inflation levels are falling, however. The annualized inflation figure of 55.1 percent for May 1996 is well below the 90-percent rates reported last year.

FEWS has added several new products to its World Wide Web page, including Meteosat rainfall images and seasonal rainfall graphs. These products are now available at—

<http://www.info.usaid.gov/fews/fews.html>
and will be updated three times a month.

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