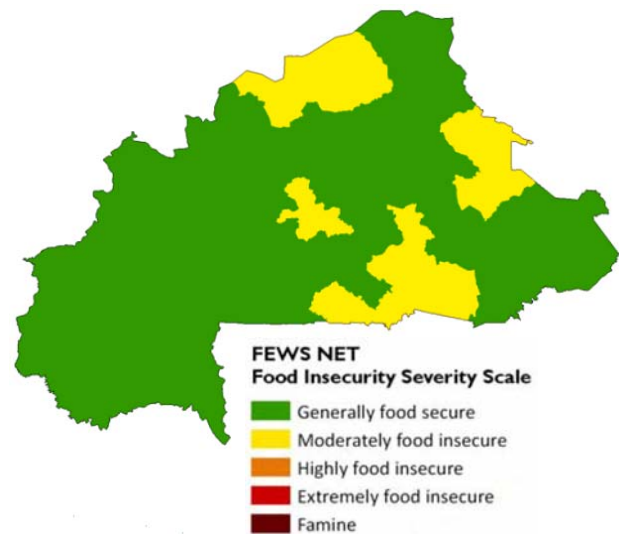


BURKINA FASO Food Security Update

November 2008

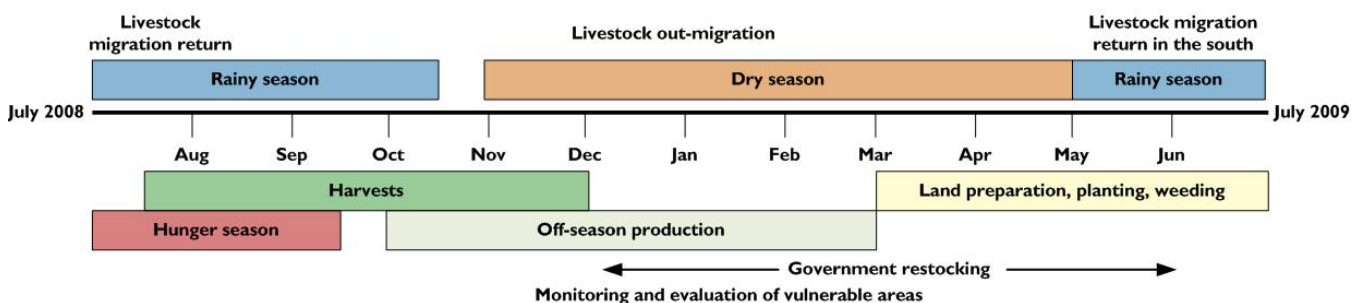
- According to gross grain production forecasts released by the CILSS, Burkina Faso can expect a record 4,213,256 metric ton harvest for the 2008/2009 growing season, which could mean a net 717,000 MT surplus, meeting 24.3% of household consumption needs.
- Food security conditions in all livelihood zones are generally good, except in areas with production shortfalls, flooding problems, or regularly high rates of acute malnutrition.
- The downswing in prices on domestic markets beginning last month continues in the face of regular shipments of grain crops to market in anticipation of the year-end holiday season.
- Terms of trade for livestock/grain are still in favor of pastoralists due to the abundance of grain and heavy demand for livestock during the holidays.

Figure I. Food security assessment, October-December 2008



Source: FEWS NET Burkina Faso

Seasonal calendar and critical events



Source: FEWS NET Burkina Faso

Current food situation

The household food situation in the midst of the current harvesting period in livelihood zones across the country is looking good. Families have sufficient food supplies for their daily meals without any major problems thanks to good grain availability. A study of projected production figures for the 2008/2009 growing season developed by the National Food Security Forecasting Committee (see the graphs in the annex) shows millet, sorghum, and corn crops accounting for most grain production. According to these figures, the Boucle du Mouhoun (21%), Sahelian (14%), and Northern (13%) regions account for most of the country's millet production. Most of its sorghum comes from the Boucle du Mouhoun (16%) and

Northern (12%) regions, followed by the Hauts Bassins, Central Western, and North-Central regions, which account for 10% of this figure. The Hauts Bassins (40%), Central Eastern (17%), and Cascades (13%) regions account for most of the country's corn production.

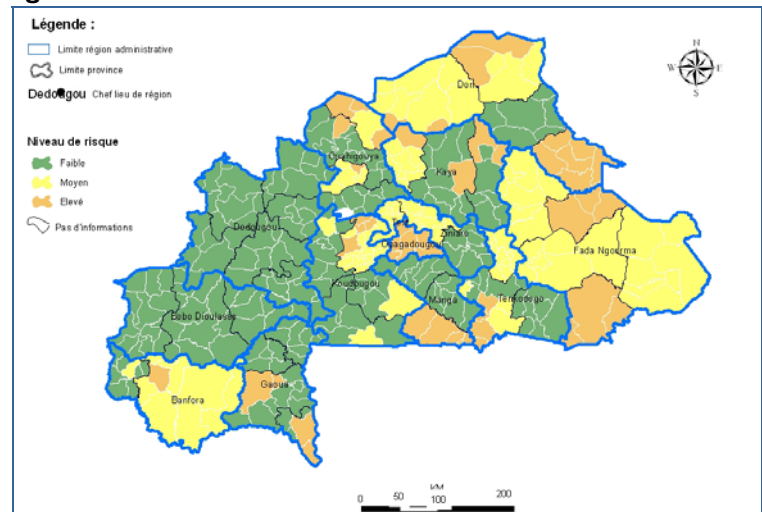
The rice production forecast is especially interesting in light of the government policy that provides rice farmers with free seeds and subsidies for farm inputs, which is expected to boost production by 242% from last year, putting it 167% above the five-year average. Most of this record output comes from livelihood zones known as major grain-producing areas in the Hauts Bassins and Cascades regions in the western reaches of the country, and in the Eastern and Central-Eastern regions with large rice-growing plains equipped with dams as part of hydroagricultural development schemes (see Figure 4).

There are also important gains in other types of crop production. Production forecasts for cash crops (cotton, groundnuts, sesame, and soybeans) are up by more than 45% from last year. Figures for other food crops (yams, potatoes, cowpeas, and earthpeas) show gains of over 30%. Cowpea production alone is up by more than 186%, to 724,131 metric tons.

Despite the expected record harvest, parts of the country will face hardship conditions in the next few months due to localized production shortfalls (see Figure 2). Thus, the Sahelian provinces of Yagha, Oudalan (Tin-Akoff and Déou Departments), and Soum will probably face food shortages, since they are generally the most vulnerable provinces from a food security standpoint. Production forecasts indicate that these areas will fall short of household consumption needs. Certain departments in Lourum, Zondoma, Yatenga, Namatenga, Bam, and Sanmatenga provinces (which are in the same situation as the Sahel) and Boulkiemde province will see these same conditions.

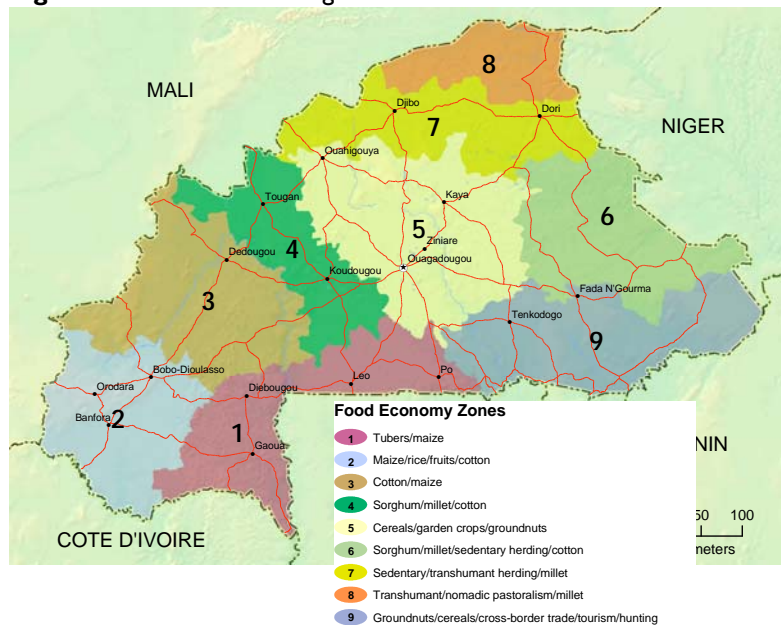
The food situation in parts of Comoé province reporting crop damage from elephant herds could quickly deteriorate. The same is true in Noubiel, Loba and Poni, areas hard hit by natural disasters and violence. Any surplus crops in these areas, which normally have surplus production, are generally sold on the local market as a source of income to pay for

Figure 2. Potential food-insecure areas



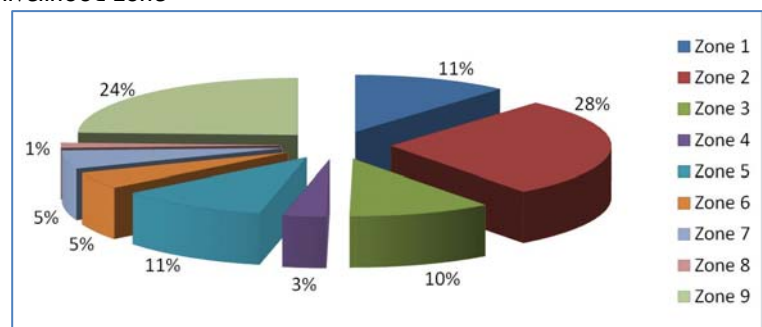
Source: FEWS NET Burkina Faso

Figure 3. Administrative regions and livelihood zones



Source: FEWS NET Burkina Faso

Figure 4. Breakdown of the gross rice production forecast by livelihood zone



Source of data: DIPS; Graphic by FEWS NET Burkina Faso

nonfood household expenses. However, the reported crop damage in these areas could wipe out any production surpluses, forcing households to draw on their food reserves so they can cover their nonfood expenses.

Markets, trade, and food access

Grain availability on domestic markets is improving with the regular shipments of fresh crops to market. Likewise, there is good grain availability on collection markets, with farmers unloading their reserves in search of cash to pay for their expenses during the year-end holiday season (including the celebration of Tabaski, Christmas and the New Year). This has driven down prices on rural markets, except in a few areas reporting production shortfalls, where prices are still running high. This downturn in prices has affected both assembly point and terminal retail markets. As illustrated by the graphs in the annex to this report, grain prices (millet, sorghum, and corn) are coming down on the Sankaryaré market, in contrast to Djibo, which is reporting higher prices, most likely due to this year's allegedly poor growing season in the Sahelian region. In general, prices on most domestic markets are still running high compared with the five-year average, as well as with 2005 prices for the same time of year (which was a year of record high prices).

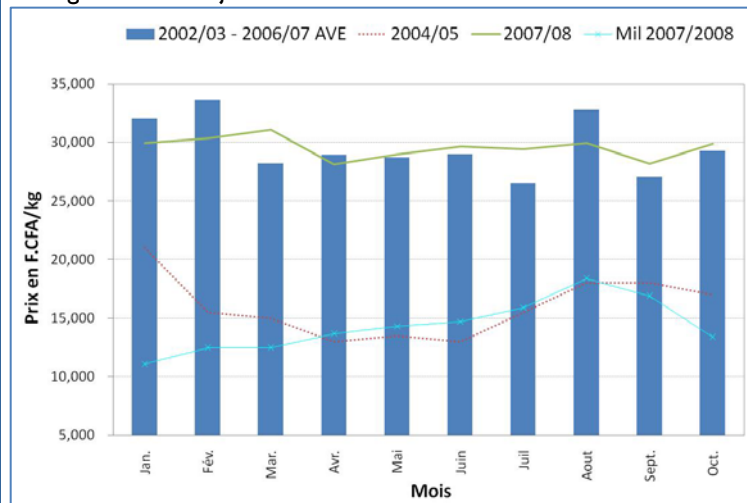
The seasonal downswing in prices should continue through the end of December or the beginning of January. As of January, expected grain collections for rebuilding national intervention stocks (10,000 MT) and the national food security reserve (20,000 MT) will drive up prices on markets in grain collection and assembly points. Likewise, the price of local rice crops will be driven up by direct government procurements of more than 40,000 MT of rice from area farmers to supply certain government facilities (military barracks, hospitals, etc.)

With the current condition of livestock (well-fattened animals, easy access to watering holes, no serious animal health problems) and the celebration of Tabaski, terms of trade for livestock/grain are in favor of pastoralists. Thus, the price of a whole Sahelian male goat in good condition on the Djibo market in a livelihood zone dominated by livestock-raising activities and millet production has been trending upwards since September and is still running high compared with last year and the five-year average. It should continue to rise, peaking in early December with the holidays and exports to neighboring countries.

Outlook, conclusions, and recommendations

The government needs to take immediate steps to mobilize national intervention stocks to ensure a regular food supply for at-risk population groups in food-insecure areas in the country's eight food-short provinces. Moreover, grain and rice collections by SONAGESS to rebuild the national food security reserve and national intervention stocks should be confined to areas reporting good harvests and be made directly by farmers to ensure they are well-paid for their crops. The government also will need to institute a special policy to facilitate grain transfers by stakeholders in the grain trade (traders and truckers) from surplus to deficit areas.

Figure 5. Trends in millet prices and in the price of a whole Sahelian male goat on the Djibo market



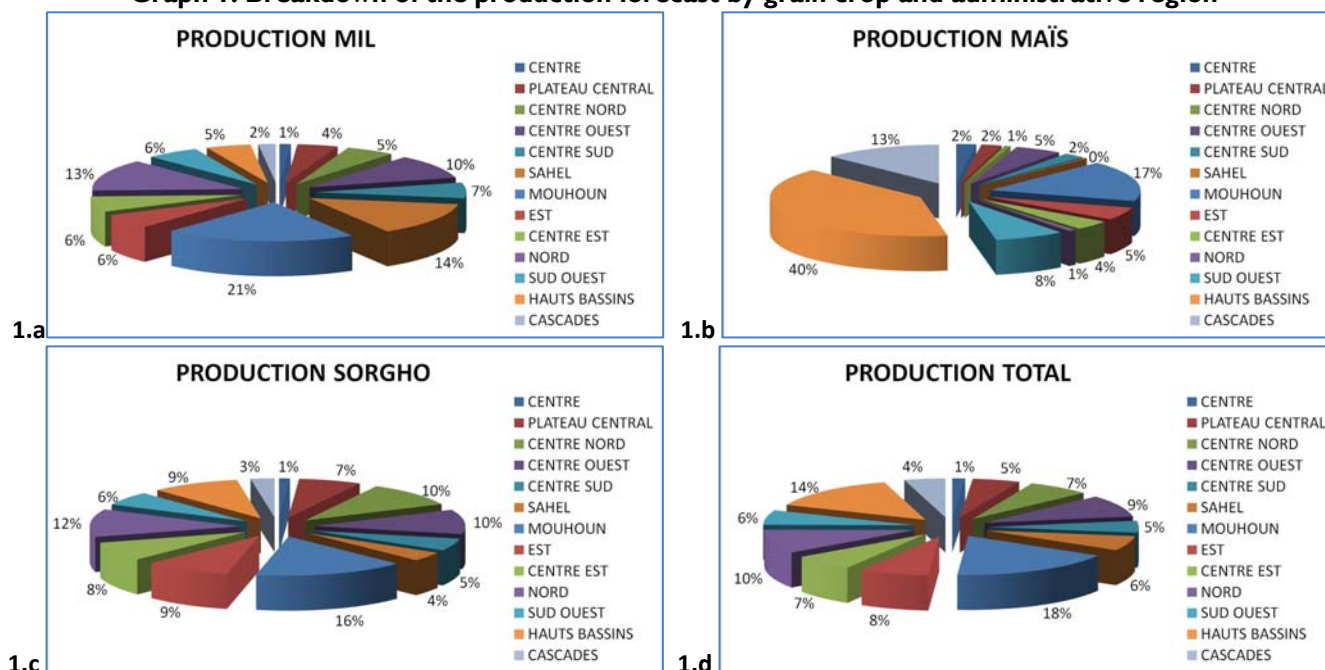
Source of data: SONAGESS and DGPSE; Graphic by FEWS NET Burkina Faso

Annexes

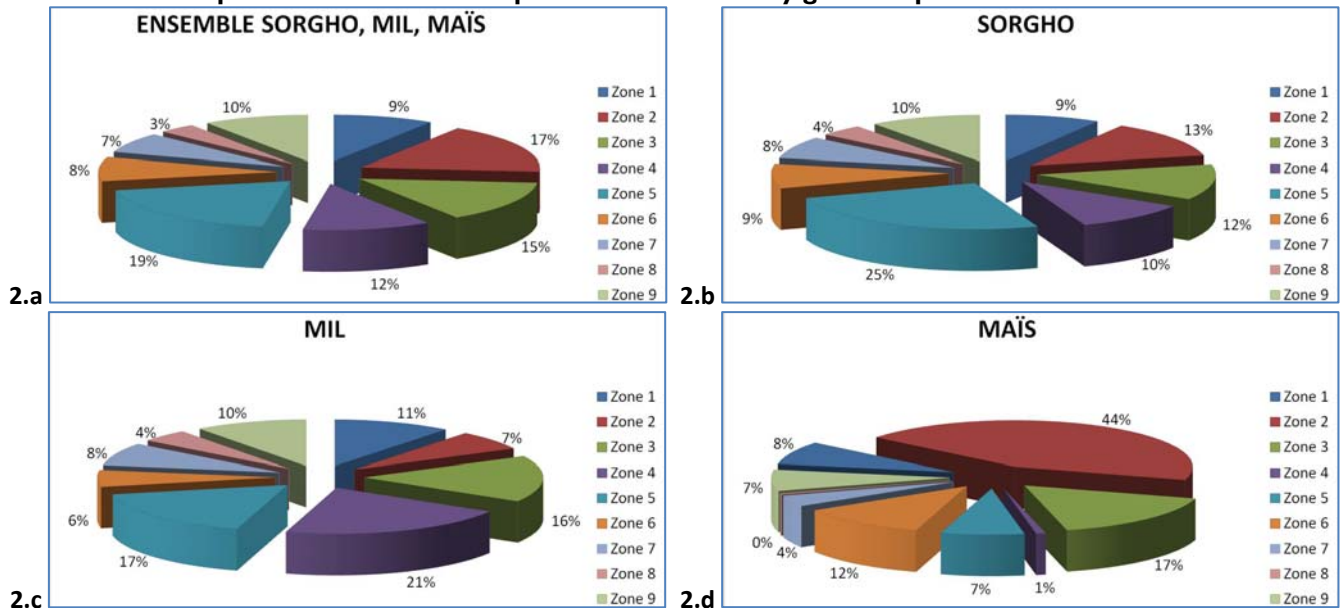
Table I. Grain production forecasts for the 2008/2009 growing season

Campagne	Mil	Sorgho	Riz	Maïs	Fonio	Total
2008/2009	1,198,629	1,950,064	235,810	803,921	24,833	4,213,256
2007/2008	966,076	1,507,162	68,916	533,874	12,843	3,088,811
Moy. quinq 2003/04 à 2007/08	1,091,844	1,464,063	88,342	669,314	95,585	3,323,148
Variation 08/09 sur 07/08	24%	29%	242%	51%	93%	36%
Variation 08/09 sur moy. 03-08	10%	33%	167%	20%	159%	27%

Graph I. Breakdown of the production forecast by grain crop and administrative region

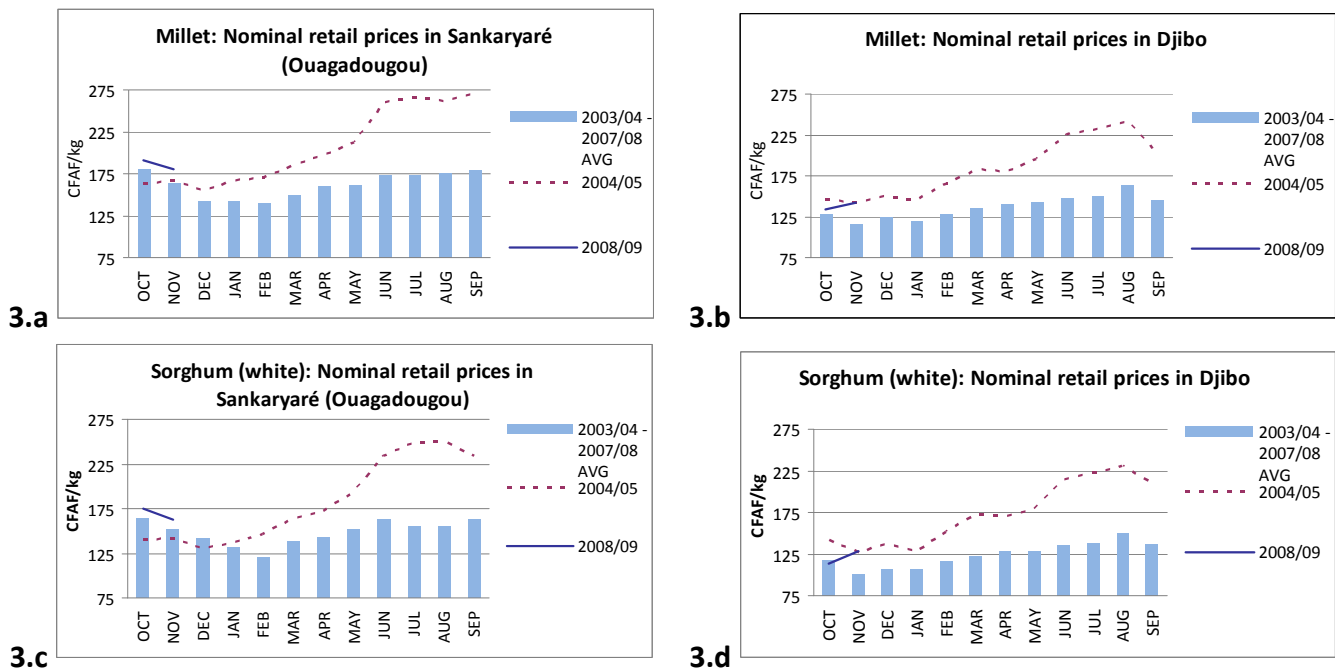


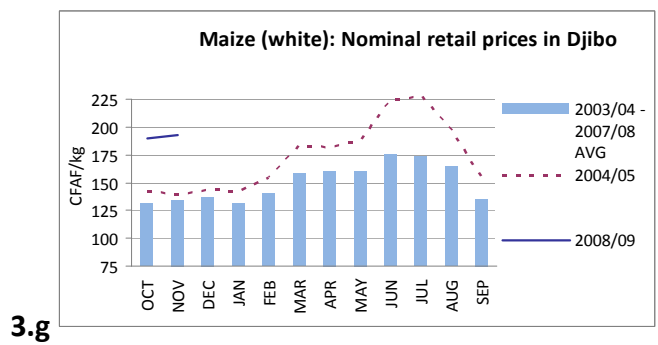
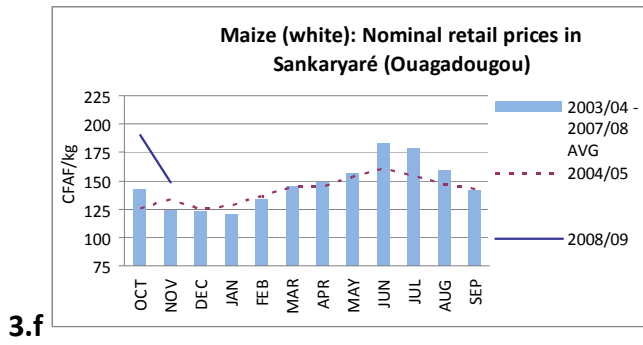
Graph 2: Breakdown of the production forecast by grain crop and livelihood zone



Source of data: DGPSA; Graphs by FEWS NET Burkina Faso

Graph 3. Trends in nominal retail prices for millet on selected reference markets between May and October of 2008





Source of data: SIM/SONAGESS; Graphs by FEWS NET Burkina Faso

TRANSLATION OF TEXT IN GRAPHICS

Figure 1

FEWS NET food insecurity severity scale

(Use standard legend)

Timeline

Dry season

First planting and replanting

Dry season

Lean period

Rainy season

Weeding – Second dressing – Field clean-up

Off-season grain production / Truck-farming season

Land preparation (plowing)

Harvests

[change months to English]

Disasters (mine cave-in, floods) and disputes between farmers and herders in the Southwest

Imports of Ghanaian corn through Leo and Guelwongo

Figure 2

Legend:

Boundaries of administrative regions

Provincial boundaries

Dedougou – Regional capital

Risk level

Low

Medium

High

No data

Figure 3

Legend:

Boundaries of administrative regions

Provincial boundaries

Livelihood zones

Groundnuts, grain, cross-border trade, tourism, hunting

Livestock, millet

Cotton, corn

Grain, truck-farming, groundnuts

Transhumant pastoralism, pearl millet

Corn, rice, fruit, cotton

Sorghum, millet, cotton

Sorghum, millet, sedentary stock-raising, cotton

Tubers, corn

Regions on the map:

North, North-Central, Central Plateau, Central, East, Central Eastern, Central Western, South-Central, Southwest

Figure 5

... Millet

Price in CFAF/kg

[change months to English]

Month

ANNEX

Graph 1a

MILLET PRODUCTION

Regions:

Central

Central Plateau

North-Central

Central Western

South-Central

Sahel

Mouhoun

East

Central Eastern

North

Southwest

Hauts Bassins

Cascades

1b: CORN PRODUCTION

- same as 1a -

1c: SORGHUM PRODUCTION

- same -

1d: TOTAL PRODUCTION

- same -

Graph 2a

AGGREGATE SORGHUM, MILLET AND CORN PRODUCTION

2b: SORGHUM

2c: MILLET

2d: CORN