

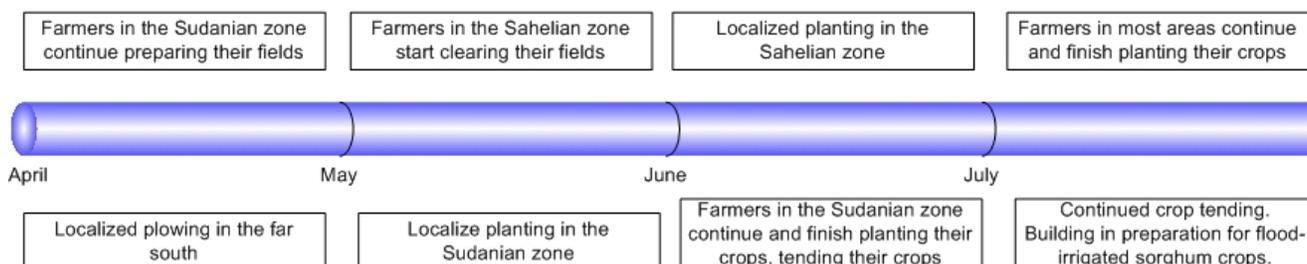
OVERVIEW

Recap of current threats.....1
 Food security conditions1
 Overall situation of the
 refugee population and host
 communities.....2
 Price analysis.....3

SUMMARY AND IMPLICATIONS

Distributions of food rations for the month of April in all Sudanese refugee camps were close to normal. According to the World Food Program (WFP), the supply pipeline is now operating smoothly. Grain prices are still climbing on most major markets around the country and there is a steady deterioration in the terms of trade for pastoralists selling sheep on both the N'Djamena and the Abéché markets. With the deterioration in food security conditions in certain parts of the country, the Steering Committee for the Action Committee for Food Security and Disaster Management (CASAGC) headed up by the Minister of Agriculture met on Friday, April 1st and recommended the mounting of a subsidized sales program beginning in the month of May.

SEASONAL CALENDAR



CURRENT HAZARD SUMMARY

- Grain prices are steadily climbing, purchasing power is weakening and opportunities for engaging in supplementary income-generating activities are increasingly limited. All three of these indicators of a deterioration in household food security conditions are present in most areas vulnerable to food insecurity problems in the country's Sahelian zone.
- Stagnant or sluggish cotton sales in the Sudanian zone are curtailing the access of cotton farmers to regular grain supplies to feed their families. Pockets of drought in rice-growing areas of the livelihood zone dependent on rice farming as a cash crop are another major cause of the deterioration in the food situation in this part of the country. A poor grain harvest and shortage of pasture are also contributing to the poor food situation.
- The food security of host communities in settlement areas for Sudanese refugees, particularly around the Cariari and Ouré Cassoni camps, is troubling government officials in that region.

FOOD SECURITY CONDITIONS

The food security of certain households is steadily deteriorating with the constant rise in grain prices, the erosion in purchasing power and the slowdown in supplementary income-generating activities, particularly among the local population in settlement areas for Sudanese refugees. Poor and middle-income households in livelihood zones dependent on transhumant pastoralism, rainfed grain crops and cotton, groundnut and rice production (as cash crops) and agropastoralist households are especially affected by this problem.

In fact, the current socioeconomic climate does not bode well for the food security of poor and middle-income households in parts of the Sudanian zone. The slump in cotton sales in the Sudanian zone and pockets of drought in rice-growing plains are the two main causes of the deterioration in food security. The poor grain harvest and shortage of pasture are other contributing factors to the poor food security of low and middle-income households.

Shortage of pasture in certain parts of the country

The lack or shortage of natural pasture in parts of the Sahelian zone as a result of inadequate rainfall and the destruction of natural vegetation by desert locusts is beginning to create problems. According to several sources, the heavy concentrations of animals in the southern reaches of the Ouaddaï and Wadi Fira regions, around Lake Chad and Lake Fitri and in parts of the Sudanian zone are responsible for overgrazing. Concerns over the condition of the animals of agropastoralists and certain sedentary herders in areas dependent on transhumant pastoralism and rainfed grain crops are beginning to mount, not only due to the shortage of natural pasture, but also because of watering problems (caused by the lowering of the level of the water table and the drying up of watering holes). A deterioration in the physical condition of livestock is entirely possible within the next few months in the event of any delay in the onset of the rainy season in the Sahelian zone, which is scheduled to begin sometime in the first half of July.

FEWS NET is recommending the regular monitoring of grazing and animal watering conditions by everyone involved in the livestock sector in the broadest sense of the term (the Ministry of Livestock, the Ministry of the Environment, ongoing projects, NGOs) to head off a possible crisis.

Recap of the joint WFP/Ministry of Planning and Health/DPA mission in certain at-risk areas

In the wake of the report by the Crop Production Service (DPA) to the members of the Steering Committee for the Action Committee for Food Security and Disaster Management (CASAGC) on March 22nd of this year, the latter committee commissioned a rapid assessment of conditions in certain food-insecure areas of the country by a multidisciplinary team composed of representatives of the Ministries of Planning, Health and Agriculture and the WFP.

Two teams commissioned by the CASAGC toured Batha department and parts of Lake Chad and Kanem departments in the Sahelian zone and Mayo Boneye, East and West Tandjilé and West Logone departments in the Sudanian zone over the period from March 24th through March 29th, issuing two main recommendations, namely :

- the mounting of subsidized grain sales programs in food-insecure areas of the country; and
- the furnishing of assistance in the form of seeds for planting grain crops and plant health products before the beginning of the rainy season.

The Crop Production Service and National Food Security Administration are in charge of organizing these sales beginning in May.

OVERALL SITUATION OF THE REFUGEE POPULATION AND HOST COMMUNITIES

In general, the food security of the refugee population has been nearly back to normal since March, and has been steadily improving throughout the month of April. In contrast, the food security of host communities is troubling, particularly in the north.

1. Food security of the Sudanese refugee population

After the shortage of grain affecting the size and the regularity of distributions of food rations in several Sudanese refugee camps in February, conditions normalized in March, and the food situation has been steadily improving throughout this past month. Distributions started back up in mid-April and, in general, are going smoothly. The WFP and its partners in the distribution of these food supplies are doing an amazing job in the field. The food ration is currently somewhere around 2,070 kilocalories, which qualifies as normal.

2. Food security of the host population

Host communities in the area of the Cariari and Ouré Cassoni camps are experiencing food insecurity problems. There are already signs that the upcoming lean period is going to be a difficult one. The area's population has just about exhausted its coping strategies and has very few if any food reserves. Despite isolated assistance efforts in the form of food for work and school meal programs conducted by WFP, the local population is unable to meet its food needs in the face of a shortage or lack of necessary resources. FEWS NET is recommending that its partners in the field continue to monitor the food situation closely, along with regional government authorities.

3. Health conditions

In general, health conditions are relatively stable. According to the latest information, the same is true of the nutritional state of the population. However, there are reports of a few cases of meningitis in the Iridimi camp. The latrines are

overflowing in a number of camps, which is dangerous for the health of the camp population. There is a real fear of an outbreak of seasonal illnesses such as cholera, unless appropriate sanitation measures are taken in time. FEWS NET is encouraging the pursuit of preventive health and hygiene programs in the refugee camps. Officials are currently studying the possibility of mounting an HIV/AIDS prevention/treatment program. There is still no information on the prevalence rate in this area.

ANALYSIS OF GRAIN PRICES

Millet prices on the four leading domestic markets

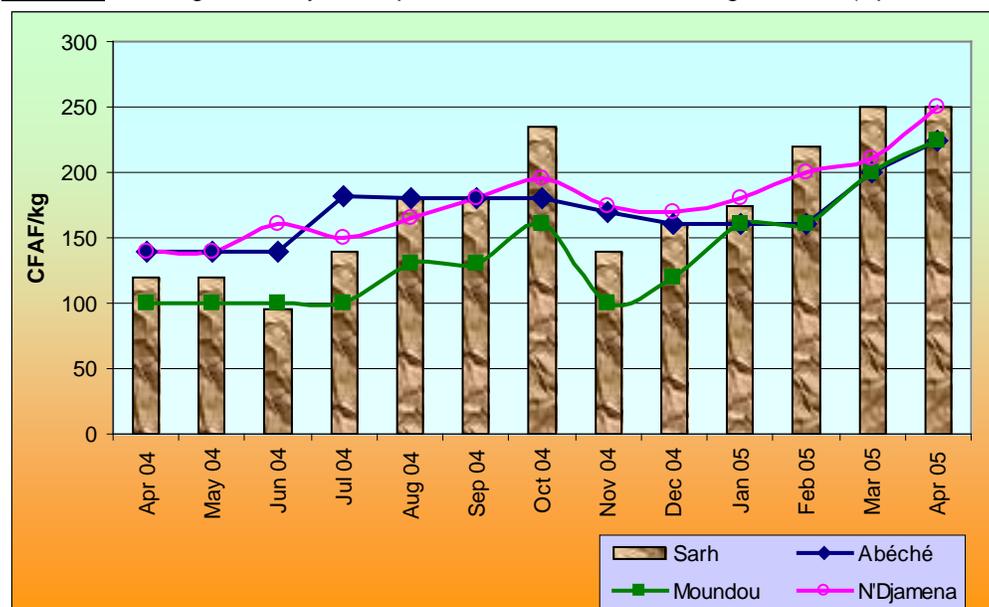
In general, prices are still skyrocketing on most markets in the country's Sahelian and Sudanian zones.

Of the four leading markets tracked by FEWS NET, only in Sarh did prices finally level off between March and April, after climbing steadily upwards since November 2004. This price stability is attributable to supplies of *berbéré* or flood-irrigated sorghum crops from the nearby Roro and Amtiman regions. However, even though prices have leveled off, the Sarh market is still reporting some of the highest prices in the southern part of the country.

Prices for millet and other grains are up from last month on the Moundou, Abéché and N'Djamena markets. Millet prices are 12.5% higher than in March on the Moundou and Abéché markets and are up by 19% on the N'Djamena market. The steady upward trend in prices on all three of these markets is attributable mainly to tight market supplies of grain in the wake of the poor harvest for the 2004-05 growing season and the expansion in the size of the area planted in cotton, at the expense of grain crops.

The price of red sorghum, which is a popular substitute for millet, is up by anywhere from 8 to 15% from last month, depending on the market. Prices on all four markets are up from the same time last year by anywhere from 61% in Abéché to as much as 108% in Sarh.

Figure 1: Average monthly millet prices on Chad's four leading markets (April 2004 to April 2005)



Source: SIM (Market Information System)
Analysis by FEWS NET Chad

Millet prices are running anywhere from 31% (in Abéché) to 72% (in Sarh) above the five-year average. April prices on the Sarh market are 14% above figures for 2001 which, until now, had held the record for the largest hikes in domestic market prices since 1993.

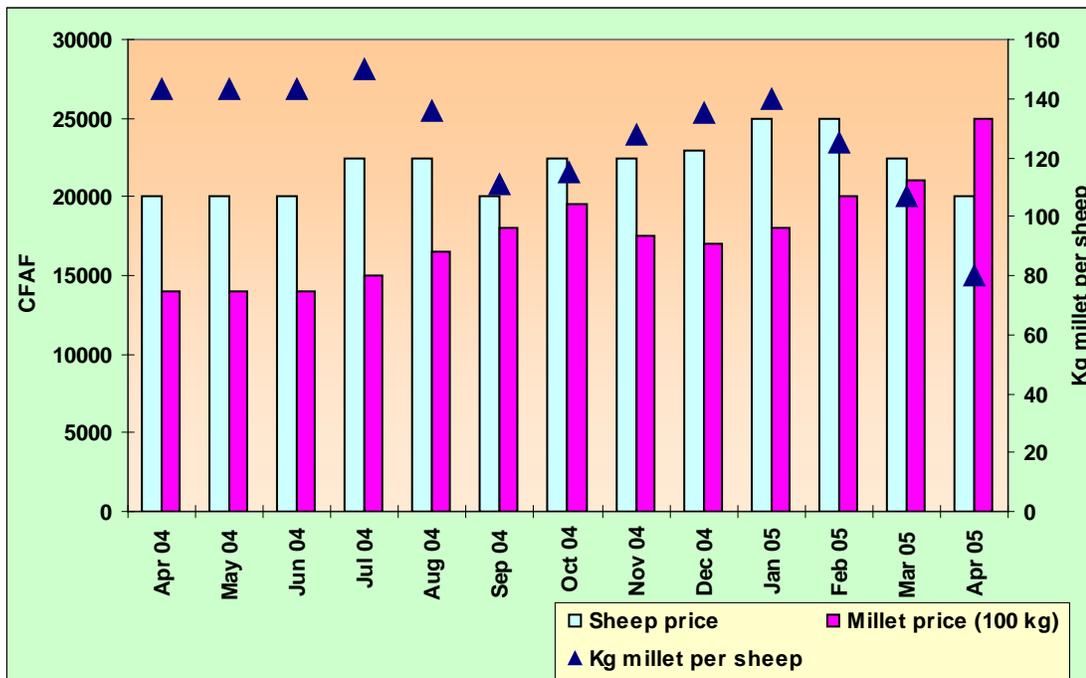
Current price levels on markets around the country and on the Sarh market in particular are undermining the food security of poor and middle-income households, which are seeing a further erosion in their already weak purchasing power. This year's lean period is expected to be a difficult one for this group of households. FEWS NET is recommending the regular monitoring of price trends on the country's leading markets by all food security partners, along with a search for ways and means of alleviating any human suffering.

Terms of trade on the N'Djamena market

Sheep prices on the N'Djamena market are down from the month of March (20,000 F versus 22,500 F), while millet prices are steadily rising (25,000 F per 100 kg sack, up from 21,000 F in March). The slide in sheep prices is attributable mainly to the shortage of natural forage, which is affecting the weight of the animals brought to market. The high temperatures reported in mid-April (40-47 degrees Centigrade) are another factor contributing to the deterioration in the condition of fattened sheep and the resulting slippage in prices. With the levels of wells in transit areas steadily falling and animals drinking more water than normal for this time of year, herders are being forced to make a special effort to find water for their livestock which, despite all such efforts, are still unable to meet their consumption needs. All these factors have contributed to the downswing in sheep prices.

The steady deterioration in terms of trade for sheep/millet since January of this year continued into April. Price ratios are currently at their lowest level since April of last year. The animals of pastoralists looking to sell sheep are currently going for the equivalent of less than a 100 kg sack of millet (80 kg), compared with just over 100 kg (107 kg) back in March. Current terms of trade for sheep/millet are down by 63 kilograms (80 versus 143 kg) from the same time last year. In both comparisons (with last month and April of last year), current price ratios are working against pastoralists looking to sell their sheep, whose food security is being undermined by the sharp erosion in their buying power, seriously curtailing their grain access.

Figure 2: Terms of trade for sheep/millet on the N'Djamena market (April 2004 – April 2005)



Source: SIM (Market Information System) and FEWS NET Chad