SENEGAL
Monthly Food Security Update
JULY 2006

ALERT LEVEL:
NO ALERT
WATCH
WARNING
EMERGENCY

Summary

After a long dry spell, there was new rainfall activity in all parts of the country during the first dekad of July. Rainfall conditions compared with the historical average for the period of 1971-2000 are still somewhat mixed, with the eastern part of the country reporting start of the season rainfall deficits affecting the start-of-season in that area. A look at streamflow conditions during the first dekad of July of this year shows mixed trends in water levels on rivers and streams around the country. Food security conditions are not very positive for rural households in most parts of northern Senegal in the midst of the lean period.

Seasonal calendar

Current hazards summary

- The eastern part of the country (Tambacounda, Bakel and Matam departments) is reporting a rainfall deficit, which is becoming worrisome.
- There has been no improvement in food security conditions, which are still marked by food access problems for the most food-insecure households.
- The condition of pastureland is extremely mixed. Pasture resources in the south are acceptable, while the quality and stage of development of pasturelands in the north preclude their use by grazing animals.

Food security conditions

The rainy season got off to a good start in the southern and central parts of the country, where meteorological conditions have been relatively good, while western and eastern Senegal are having problems getting enough rainfall. There is still no improvement in the rather poor food security situation which households in the northern and north-central parts of the country have been experiencing for the past several months. The food access of food-insecure households is still limited in the face of current comparatively high price levels and poor grain availability from locally grown crops characteristic of the lean period.

The current juxtaposition of cyclical factors contributing to food insecurity problems could increase the speed that poor households see their economic conditions decline by limiting their sources of food and weakening their capabilities just as farming activities in the country's main crop-producing areas start to pick up with the onset of the rainy season.

Pasturelands

The condition of pasturelands is extremely mixed, in line with the progress of the rainy season (Map 1).

The Ziguinchor region and Kédougou and Foundiougne departments are reporting good progress in the growth of new vegetation. Though there is relatively little new vegetative growth in the central part of the country, whatever new growth exists is a source of pasture for grazing animals.

New plant cover is beginning to emerge in the north and far north, in and around the vicinity of Linguère. The only pasture resources elsewhere in these areas consist of straw residues.

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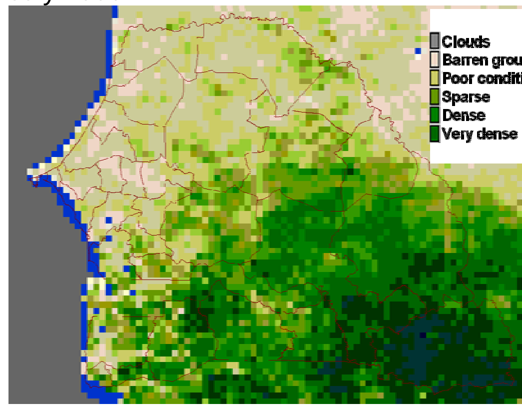
The limited availability of natural forage and overcrowding in grazing areas have triggered atypical seasonal migratory movements by livestock from the central reaches of the country (Kaolack, Diourbel, Fatick) towards the Kaffrine classified forest and Sadio, a forest-grazing area in the northern Tamba region.

Animals in the northern and central parts of the country and in Tamba and Bakel departments are still being watered at year-round watering holes (wells and boreholes). In contrast, animals in Kédougou department and the Kolda and Ziguinchor regions in the south are being watered at seasonal lakes and ponds filled by the abundant rainfall in these parts of the country, whose water levels vary from one area to another.

Animal weights are still fair to mediocre and supplies on livestock markets are still ample.

Map 1: Vegetation index for the 3rd dekad of July 2006



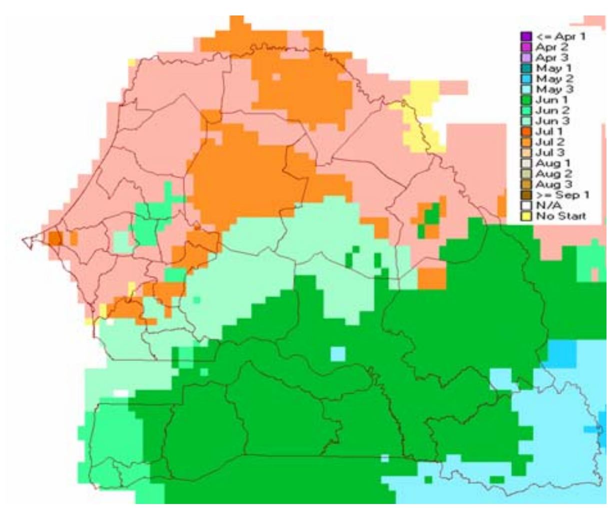
Source: NOAA/USGS

Progress of the 2006-2007 growing season

After a long dry spell, there was new rainfall activity in all parts of the country during the first dekad of July, particularly in the north, in the vicinity of Podor and Ranérou, which got their first useful rains of the season. All other areas received relatively light rainfall, precluding the wet planting of crops. However, these are normal conditions for this time of year in the northern part of the country.

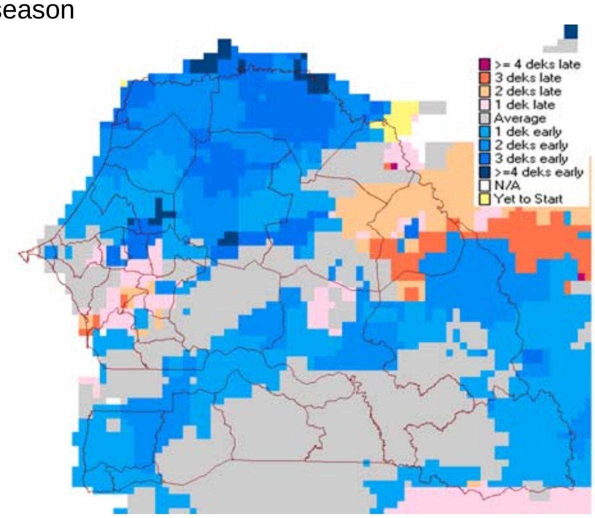
The soil water content in the Ziguinchor region and Kédougou department is more than satisfactory thanks to the good spatial-temporal distribution of recent rainfall in these areas. In contrast, water shortages in the east, in Tambacounda and Matam departments, are growing as the result of a protracted dry spell. The recent rainfall in the third dekad of the month in Tamba, where there are reports of water stress, was insufficient to make up for current deficits. Rainfall conditions compared with the historical average for 1971-2000 are still rather mixed, with the eastern part of the country reporting rainfall deficits affecting the start-of-season in this area, which is running 1 to 2 dekads behind schedule in the southern reaches of the Matam region (Maps 2 and 3).

Map 2: Start of the 2006 season



Source: NOAA/USGS; Prepared by FEWS NET

Map 3: Comparison with the average start-of-season



Source: NOAA/USGS; Prepared by FEWS NET

Stream flow conditions

A look at streamflow conditions during the month of July shows mixed trends in water levels in rivers and streams around the country.

The Senegal River has been steadily rising at all gauging stations (Bakel, Matam and Podor), though its progress is mixed. The mean monthly flow at the Bakel station was 428 cms, compared with a cross-yearly flow rate of 590 cms for the month of July.

The monthly high water mark at Matam was 334 cm, compared with 451 cm in July of last year. The figure at Podor was 283 cm, compared with 314 cm at the same time last year. With the drop in the level of the river at the Diama station on the upper river, the maximum reading was 211 cm, compared with 226 cm in July of last year.

The mean monthly flow at the Kidira station on the Falémé (a tributary of the Senegal River) was 23.9 cms, compared with 67.2 cms in July of last year.

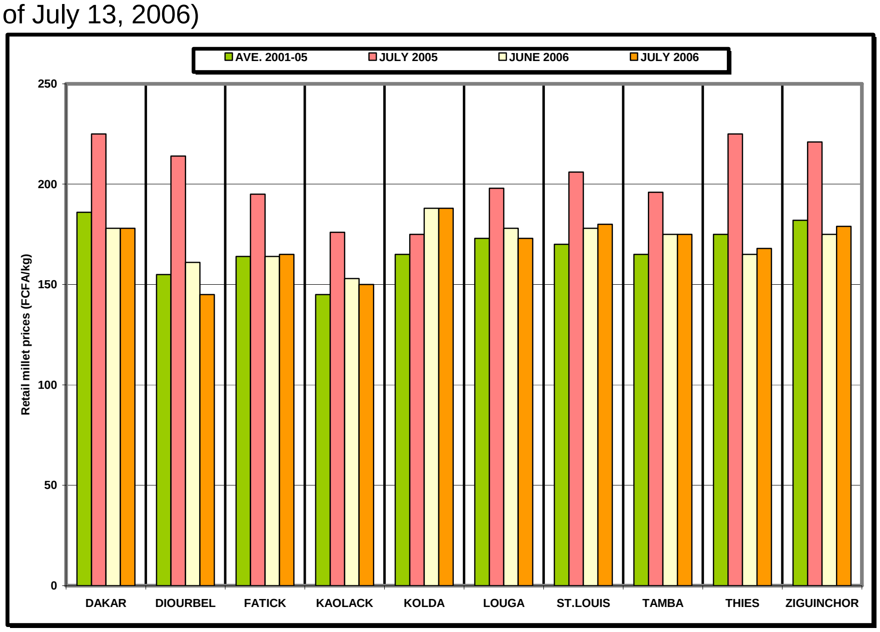
The 10-day mean monthly flow on the Gambia River was 35.4 cms, compared with 106 cms in July of last year.

The water level at the Kolda station on the Casamance River is still low compared with the last three years. The maximum reported gauge height was 182 cm, compared with 221 cm in July of last year.

Markets: Retail prices for local grain crops are beginning to stabilize

Grain trading at markets around the country is going smoothly. Price levels have more or less stabilized over the past two weeks, despite a slight downturn in prices on certain markets (Diourbel, Kaolack and Louga). This is most likely attributable to the start-up of farming activities, which is forcing farmers to unload small quantities of crops on rural markets to cover the sudden additional expense of purchasing farm inputs.

Figure 1: Trends in the average retail price of millet in regional capitals (as of July 13, 2006)



Source of data: CSA (Food Security Commission) / SIM (Market Information System); Graphic by FEWS NET

Average prices at retail markets range from 145 CFAF/kg in Diourbel to 213 CFAF/kg in Ourossogui, in the northern part of the country.

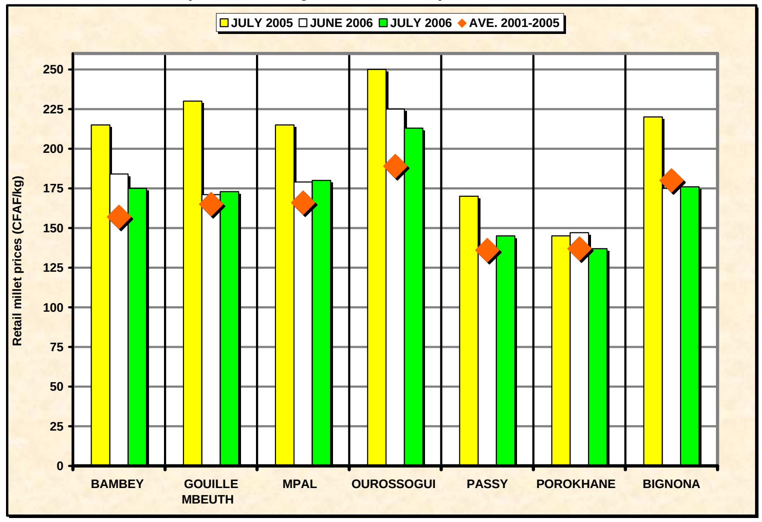
The most stable markets are Tambacounda and Thiès, where there has been virtually no change in prices since May. Prices for locally grown grain crops at most markets have begun to level off or inched downwards from last month, as in the case of Diourbel (- 10 percent) and Kolda (- 7 percent).

Despite this year's high price levels, current prices are down from last year and, on the whole, are running on par with the average for 2001-2005 (Figure 1).

A look at conditions at rural markets shows July prices down by approximately 5 percent from the month of June in Bambey, Ourossogui and Porokhane. Prices on other markets, in Gouille Mbeuth, Mpal and Bignona, showed no change from last month, with the Passy market reporting a slight rise in prices (Figure 2).

In general, prices for July of this year were running more than 5 percent above the average for 2001-2005 at all markets with the exception of Porokhane, where they were on par with the five-year average, and Bignona, where prices were slightly below-average (+2 percent). In spite of everything, grain access for the country's poorest households is still clearly better than it was at the same time last year.

Figure 2: Trends in the average retail price of millet on rural markets (as of July 13, 2006)



Source of data: CSA (Food Security Commission) / SIM (Market Information System); Graphic by FEWS NET