

REGIONAL SUPPLY AND MARKET OUTLOOK

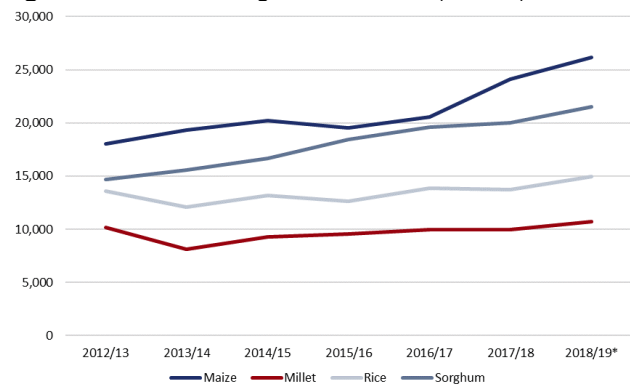
December 31, 2018

West Africa

KEY MESSAGES

- Preliminary crop assessment figures in West Africa indicate that the 2018/19 aggregate cereal production will be 74.2 million metric tons (MMT), eight percent above last season (2017/18) and 19 percent above the five-year average (2013/14 to 2017/18). Although national-level production decreases are expected in structurally deficit countries, production of major cereal crops has grown significantly compared to last year, namely maize production (**Figure 1**).

Figure 1. West Africa Regional Production (000 MT), 2012-2018



Source: Authors' calculations based on national crop assessments/CILSS data

- West Africa is expected to have an increased gross marketable surplus of coarse grains and a decreased rice deficit compared to last year and the average (**Figure 2**). Projected coarse grain surpluses, namely maize, will be in high demand from agro-industries. The region will continue to rely on international rice imports, although to a slightly lesser degree than in recent years and international wheat imports will be sustained at above-average quantities.
- The 2017/18 marketing year (MY) was marked by below-average supply and above-average demand due to limited crop performance and production deficits in the Sahel, stock withholding, and elevated source market prices. In Coastal countries, prices were primarily pushed up by inflation.
- With good harvest prospects and favorable current market trends, price trends will be below last year but will range from average to moderately above average at the national level, except in Chad and Far North Cameroon where they will be below average. Imported and local rice prices will remain above average in Coastal countries. Prices and markets and trade activities will remain atypical in deficit and conflict affected zones including the Tibesti region of Chad; northern and central Mali; and the Liptako-Gourma region across Mali, Burkina Faso, and Niger; and northeast Nigeria and the Greater Lake Chad basin. Declining global crude oil prices and upcoming general elections also stand to negatively affect stability and the macroeconomic outlook for Nigeria and the surrounding region.
- Global market supplies of rice, wheat, and maize are expected to remain above average in MY 2018/19 despite expectations for lower wheat production. Prices will continue to ease up until the end of the year, but a marginal increase is projected for 2019.
- The pastoral situation in the Sahel is much better than last season due to decent rainfall. The pastoral lean season will be normal. However, an early transhumance may occur from localized deficit areas and livestock feeding, and marketing will be disrupted in insecure conflict zones.

ABOUT THIS REPORT

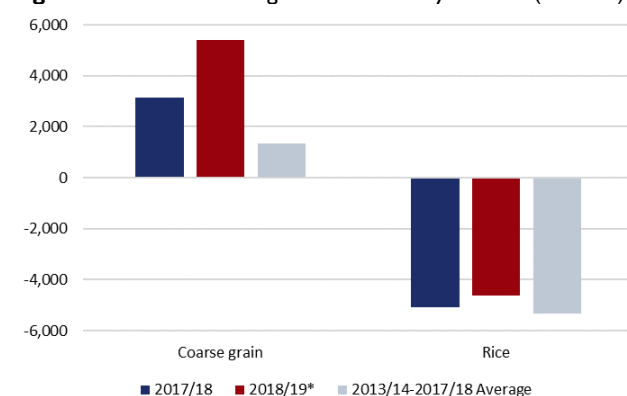
The Famine Early Warning Systems Network (FEWS NET) monitors trends in staple food supply and price trends in countries at risk of food insecurity. The Regional Supply and Market Outlook report provides a summary of regional staple food availability, surpluses and deficits during the current marketing year, projected price behavior, implications for local and regional commodity procurement, and essential market monitoring indicators. FEWS NET gratefully acknowledges partner organizations, national ministries of agriculture, national market information systems, regional organizations, and others for their assistance in providing the harvest estimates, commodity balance sheets, as well as trade and price data used in this report.

CURRENT SITUATION

Regional crop production and pastoral situation

- West Africa’s 2018/19 agro-pastoral season (June-October) benefitted from generally well-distributed rainfall across the region. Nevertheless, localized damage to crops and pastures was recorded due to dry spells and an early end to rainy season in some areas, and floods from abundant rains in others. Due to the generally favorable agro-climatic conditions and the continuing production support policies and programs, preliminary crop assessment estimates validated by the West Africa regional system for the prevention and management of food crises (*Dispositif régional de prévention et de gestion des crises alimentaires, PREGEC*), show aggregate cereal production (the major cereals include: rice, maize, millet, and sorghum) at 74.2 MMT, about eight percent higher than the previous season and 19 percent higher than the previous five-year average.

Figure 2. West Africa Regional Commodity Balance (000 MT)



Source: Authors’ calculations based on national crop assessments/CILSS data
 Note: coarse grains include maize, millet, and sorghum

Table 1. 2018/19 cereal production levels by trade basin compared to 2017/18 and five-year average (2013/14-2017/18)

Trade Basin	Compared to 2017/18				Compared to 2013/14 – 2017/18 five-year average			
	Total cereals	Millet & sorghum	Maize	Rice	Total cereals	Millet & sorghum	Maize	Rice
Western (North)	▲	▶	▲	▲	▲	▲	▲	▲
Western (South)	▶	▶	▶	▶	▲	▶	▲	▲
Central	▲	▲	▲	▲	▲	▲	▲	▲
Eastern	▲	▲	▲	▲	▲	▲	▲	▲
Regional	▲	▲	▲	▲	▲	▲	▲	▲

Note: ▶ denotes less than or equal to 5 percent change; ▲ denotes greater than 5 percent increase; ▼ denotes greater than 5 percent decrease.

Source: Authors’ calculations based on National crop assessments/CILSS data

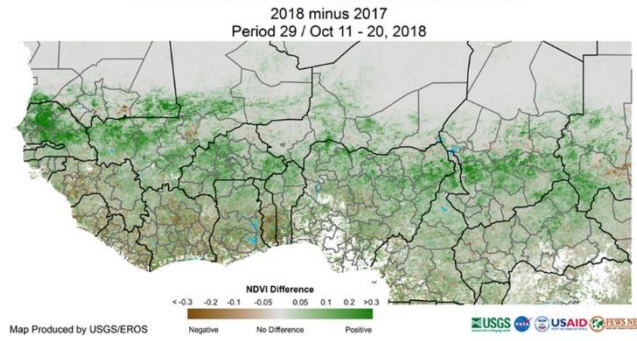
- Major cereal production increased compared to last season and the average in all the major producing countries and in all regional trade basins, except the southern part of the Western basin of Guinea, Liberia, and Sierra Leone, where overall gross production figures remained stable compared to last season (Table 1). Specific national level production decreases are expected in minor producing and structurally deficit Cape Verde (seven percent below average), Liberia (six percent below average), and The Gambia (51.2 percent below average, the largest year-on-year production decrease this season, region-wide) mainly due poor spatial and/or temporal rainfall distribution.
- In terms of specific commodity production, at the regional level, maize, despite fall wormy infestation in several areas, and rice recorded about 25 and 20 percent increases respectively compared to the average. The increasing production trend remains driven by the increase in both area harvested and yield as well as an expanding urban consumption and agro-industrial demand. To a lesser extent but still substantial, millet and sorghum production recorded more than a 10 percent increase compared to the average. Millet and sorghum production increases were particularly of note in the Sahel and northern Nigeria, the major production and consumption zones, contrasting with the dry spells and deficits of last season.
- Like cereals, cash crop development and production were favorable during the 2018/19 season, which will further sustain regional staple food supplies. According to PREGEC estimates, tuber production (mainly cassava and yam) is expected to reach about 187.2 MMT, slightly higher than the last season by four percent and substantially above average by about 21 percent. As for legumes and oilseeds, including major staples like groundnuts and cowpeas, production is projected to be about 29.2 MMT, close to six percent and 29 percent above last season and the average, respectively.

- The pastoral situation in the Sahel is much better compared to last season, which was marked by pasture and water point deficits in general and also significant livestock mortality in the Western basin and Mali’s Western Sahel. Decent rainfall favored biomass production and watering conditions in the region (**Figure 3**). Current fodder availability is good in over 80 percent of the Sahelian pastoral zone, which is higher than both last year and the median of the previous five years; and in all of the water points monitored, 90 percent have a level above the five-year median ([AGHRYMET](#)). However, poor conditions were observed in the remaining 20 percent of the Sahelian pastoral zone (Tahoua, Dosso, and Tillaberi regions of Niger; central zone of Burkina Faso; eastern and central zone of Mali; eastern half of Mauritania; and the pastoral zone of Senegal) due to late onset of the rainy season and/or dry spells, though they could be mitigated by usual movements of herds and transhumance (**Figure 4**). Lastly, foot-and-mouth (*Aphthae epizooticae*) disease remains an issue in the region and pasture inaccessibility in the above listed conflict zones.

Regional market trends and anomalies

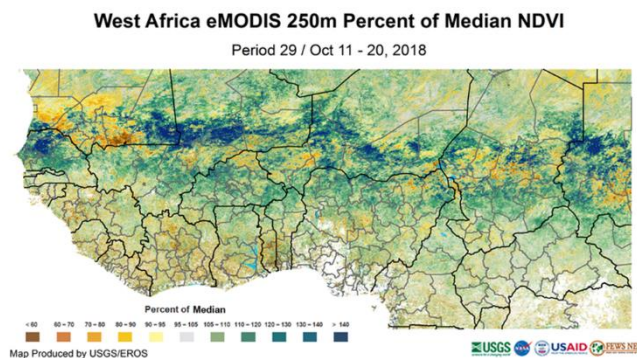
- At the end of MY 2017/18 (October-September), regional markets were sufficiently supplied with staples foods. However, much of the year was marked by constant below-average supply and above-average demand due to the limited crop performance and production deficits of the 2017/18 agro-pastoral season, stock withholding from marketing actors, and elevated source market prices. This was alleviated by off-season and early green harvests, humanitarian interventions, and the release of stocks by traders considering good harvest prospects. From combined national balance data, regional cereal opening stocks at the beginning of MY 2018/19 are estimated at 2.6 MMT (including 1 MMT of rice; 250,000 MT of wheat; and 1.2 MMT of coarse grains), which is over 10 percent below both MY 2017/18 and MY 2016/17 levels. At the market-level, sample trader stock monitoring data from CILSS’s [ECOAGRIS](#) project currently show only about 26 percent storehouse filling rate in the region as of October 2018, with cereals making up the majority of stored commodities (over 70 percent). In terms of institutional stocks, it is also important to note that ECOWAS’s Regional Agency for Agriculture and Food ([ARAA](#)), responsible for the regional reserve, reported a final stock of about 8,813 MT for 2018. Its opening stock was about 10,049 MT, and the recorded stock movements over the year comprised of 12,345 MT in entries and 13,581 MT in releases.

Figure 3. Regional vegetation development, October 2018
West Africa eMODIS 250m NDVI Difference



Source: USGS/EROS

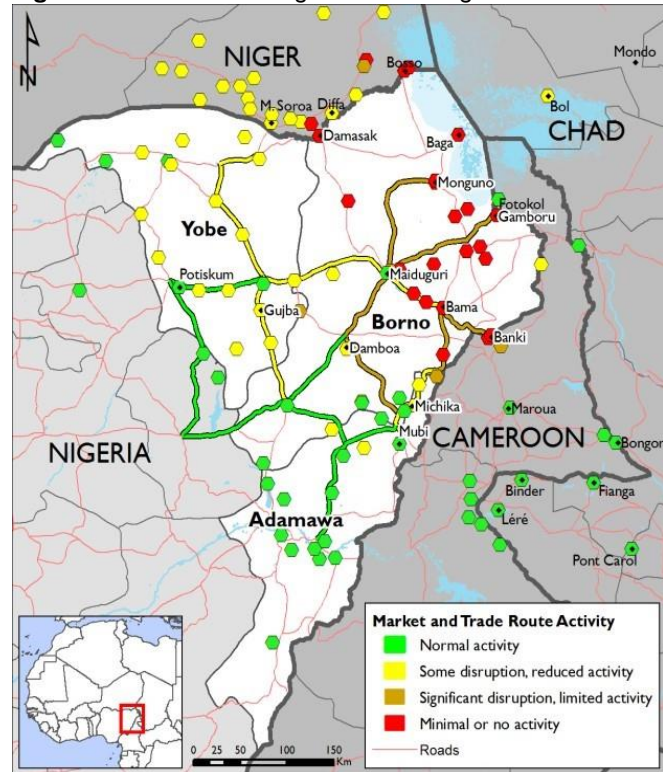
Figure 4. Areas affected by long dry spells and rainfall deficit, October 2018
West Africa eMODIS 250m Percent of Median NDVI



Source: USGS/EROS

- Major trade flows are dynamic in the region despite persistent challenges including bribes, unofficial taxes/fees, and periodical restrictions. However, market and trade activities remain disrupted by conflicts and/or civil insecurity in northeast Nigeria and the Greater Lake Chad basin; the Tibesti region of Chad; northern and central Mali; and the Liptako-Gourma region across Mali, Burkina Faso, and Niger. In northeast Nigeria, the conflict has escalated in recent weeks with a considerable increase in attacks. The latest assessments estimated that over 2 million people were displaced as of October 2018 (IOM-DTM). While market and trade activities have improved in general in much of Adamawa State, they are below normal elsewhere (Figure 5). There remain restrictions and detours, especially in the Sambisa axis covering local government areas of Damboa and Gwoza (Borno State), Madagali (Adamawa State), and Gujba (Yobe State). In Maiduguri, despite operational staple food markets, fish and livestock markets are restricted with negative market consequences, including product scarcity and increased prices.

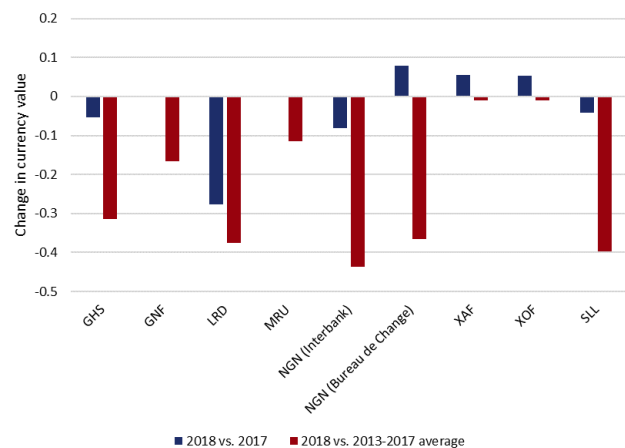
Figure 5. Market Functioning in northeast Nigeria



Source: FEWS NET

- Due to improved global crude oil prices (which represented over 80 percent of all exports in the second quarter of 2018), Nigeria’s macroeconomic situation has continued to improve. This was evidenced by modest gross domestic product (GDP) growth, a downward trending consumer price index (CPI), growing foreign exchange reserves, and a 30 percent increase in trade balance in the second quarter of 2018 compared to 2017 at the same time (FEWS NET/WFP 2018). Despite a substantial decline compared to the 2016 and 2017 recession period, inflation remains high at 11.26 percent in October 2018 (NBS). The Nigerian Naira (NGN), although stable compared to last year, remains, as of October 2018, at around 40 percent below its previous five-year average value vis-à-vis US dollar (USD) at both official interbank and market (Bureau de Change) rates (Figure 6). Elsewhere in the region, national and common custom-union currencies were by and large stable in 2018, except Liberian dollar (LRD) which has fallen sharply by about 28 percent. And compared to the previous five-year average, national currencies in mostly Coastal countries remain depreciated.

Figure 6. Regional currency values compared to 2017 and 2013-2017 five-year average, October 2018

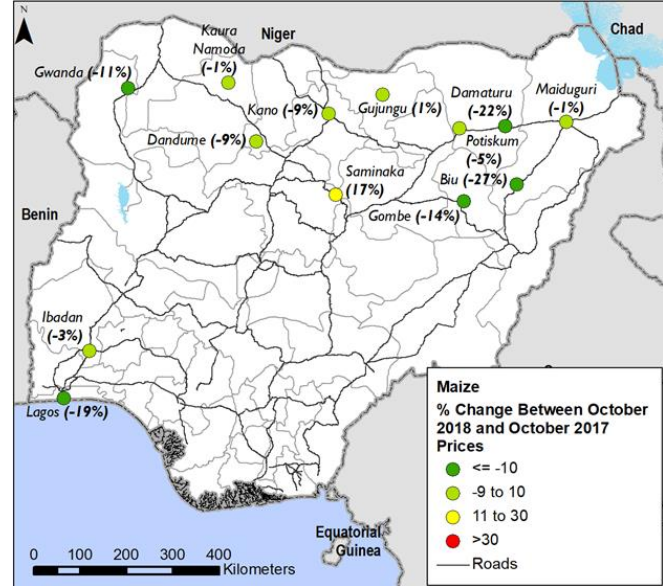


Source: Authors' calculations based on Oanda (official rates) and FEWS NET-Nigeria (Bureau de Change rates)

Current price trends and terms of trade

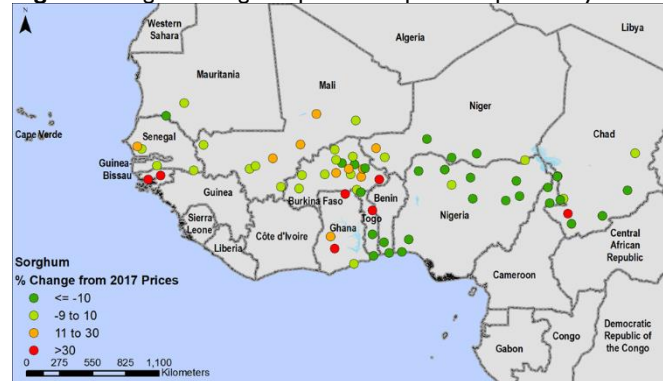
- As harvests intensify and the MY 2018/19 begins, prices are seasonally decreasing compared to previous months. There are, however, commodity and trade zone specific variations across markets monitored by market information systems (MIS) within the regional MIS network ([RESIMAO](#)), national ministries of agriculture and statistical institutes, [WFP/VAM](#), and FEWS NET. In Nigeria, prices for both cereal and cash crops are declining with the increasing availability of supplies. Nevertheless, moderate imported rice price increases have been observed due to limited local rice supply in face of consistent demand. Moreover, month-to-month price increases were observed in selected northern Nigerian markets due to increased demand, including assistance to conflict and flooding affected population. Overall, prices have significantly reduced compared to last year but remain above average (**Figure 7**).
- In the Sahel, seasonal price decreases were also observed for staples excluding localized deficits and conflict-affected areas. Coarse grain prices have fallen below last year for the most part but remain slightly above average (**Figure 8-9-10**). Cash crop prices (especially cowpeas) are currently elevated at above average levels given the elevated demand dynamics, including exports to Coastal countries. In Coastal countries, while prices for tubers and maize are stable or below average in several markets, rice prices remain above average due to the inflation and elevated imported rice parity prices, thus increasing demand for local rice (**Figure 11**).
- Livestock prices in the Sahel are variable depending on markets, species, and trade basins. Market activities have been normal since the end of Tabaski in August 2018 with good animal physical conditions. As of October 2018, prices for small-ruminants (goats and sheep) were generally stable compared to the average in Mauritania and Senegal, and moderately elevated in Mali and Burkina Faso. On the other hand, cattle prices are substantially below-average across the Sahel, particularly in Niger and Chad, where they are affected by the limited export opportunities to Nigeria given the persisting NGN depreciation.

Figure 7. Nigeria maize price changes compared to previous year



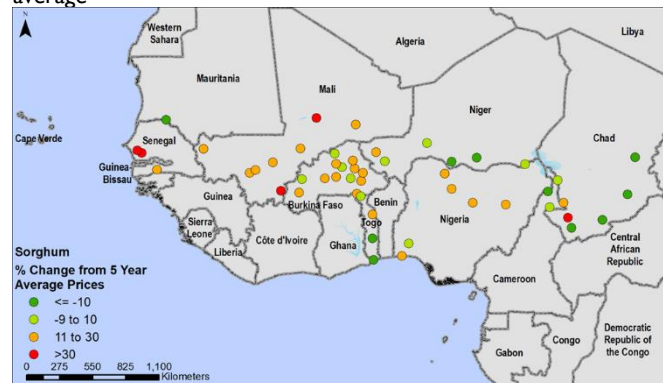
Source: FEWS NET

Figure 8. Regional sorghum prices compared to previous year



Source: FEWS NET

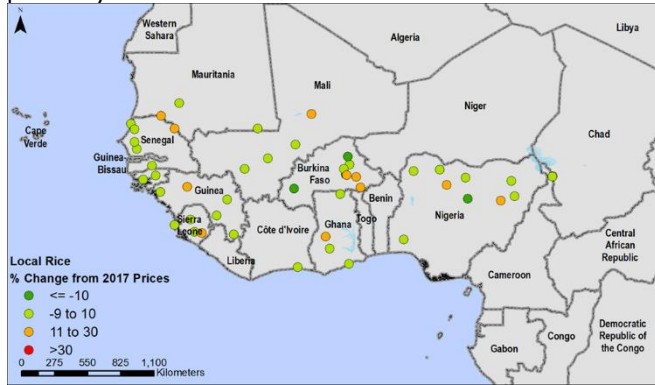
Figure 9. Regional sorghum prices compared to the five-year average



Source: FEWS NET

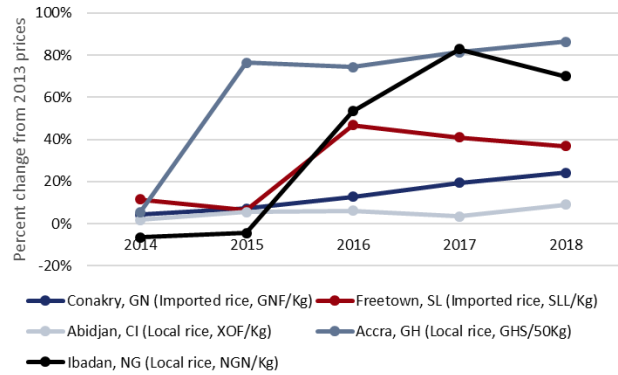
- Given the reported cereal and livestock market trends and prices, small-ruminants to cereals ToT have generally deteriorated for households and pastoralists in MY 2017/18 compared to both the previous year and the average (Figure 12). In contrast, over the same periods, cash crops to cereals ToT stayed within a good index range favoring farmers, although they have increased for cowpeas and decreased for others (Figure 13).

Figure 10. West Africa local rice, percent change from the previous year



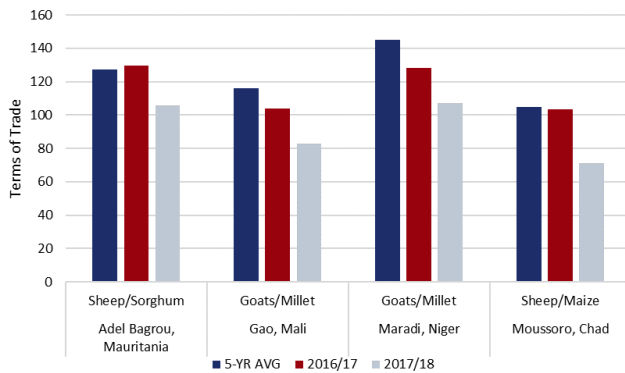
Source: FEWS NET

Figure 11. West Africa imported and local rice prices in selected Coastal markets (2013-2018)



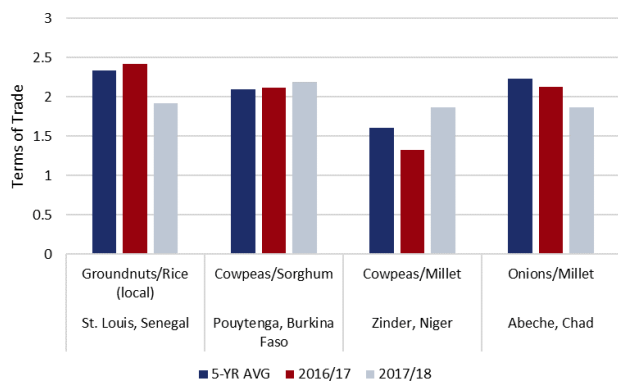
Source: FEWS NET

Figure 12. Terms of trade small-ruminant/cereal



Source: Calculations based on FEW NET-Mauritania, SAP (Mali), SIM-Bétail (Niger), and FEWS NET-Chad

Figure 13. Terms of trade cash crop/cereal



Source: Calculations based on FEW NET-Mauritania, SAP (Mali), SIM-Bétail (Niger), and FEWS NET-Chad

OUTLOOK

Regional commodity balances

- From gross balance calculations based on harvest figures compared with the human consumption requirements, West Africa is expected to have a gross marketable surplus of about 5.3 MMT in coarse grains, and a deficit of 4.6 MMT in rice (Annex 1-4). The expected gross surplus of coarse grains is about three times larger than average, continuously driven by increased the surplus of maize as opposed to persistent deficits of millet and sorghum. It should be noted, however, that current consumption norms for major commodities are outdated. In addition, given the growing poultry sector, about 5 MMT of coarse grains (including 4.5 MMT of maize) are expected to be used for feed requirements (AGHYMET).
- The region remains structurally deficit in rice, and thus will continue to rely on international imports given the strong and consistent demand. However, international imports will remain average or slightly above average in some countries, as they have dropped considerably in the region over the past years due to several factors, including currency depreciation, increased domestic production, and tariff schedules. On the other hand, international wheat imports into the region will remain steady or increase slightly. On average, over the past five years, over 4.2 MMT of wheat was imported to Nigeria and a combined total of above 2.5 MMT was destined for Senegal, Ghana, Côte d'Ivoire, Mauritania, and other Coastal countries (COMTRADE).
- The majority of internal regional cereal flows will originate from the Central basin, which expects the greatest coarse grain surpluses (Figure 14). The most important coarse grain deficits in the region will be in Nigeria, the largest regional

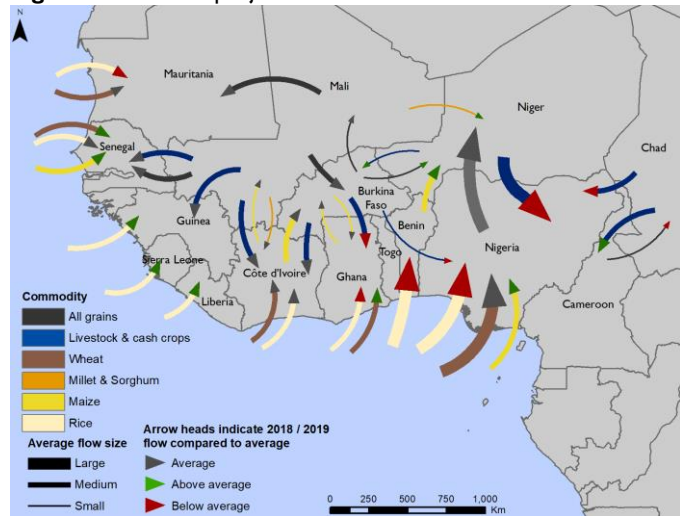
cereal consumer. Other deficits, although relatively minor on a regional scale, will be in usual deficit and minor producing countries (Cape-Verde, Mauritania, Guinea-Bissau, The Gambia, Liberia, and Sierra Leone). Intra-regional cash crop trade in the region will also remain dynamic from major producing countries in the Sahel to Coastal countries and within Nigeria.

Regional market and price outlook

- Considering good crop prospects in the region, household stocks and market supplies will continue to increase throughout the harvest (October-January), and prices will substantially decrease until March/April 2019. Overall, households and traders' demand will follow seasonal trends, low at harvest and increasing with households' progressive stocks depletion and the peak of traders' stock replenishment (in the first quarter of 2019); but overall demand will remain near average levels throughout MY 2018/19. Planned institutional purchases across the region will be below last year and near average, with no major adverse market impacts if well distributed across time and space. General price trends will be average to moderately above average at the national level (Figure 15). Chad and Far North Cameroon are exceptions, where prices will be below average due to expected record surplus in both. Furthermore, the ongoing economic downturn in Chad is resulting in lower purchase power of consumers and lack of funding for the national stock reserve's replenishment. With respect to specific trends, prices will remain atypical in deficit and conflict affected zones. Maize prices could also increase earlier in the year with poultry feed and export demand, especially in Nigeria. Millet and sorghum prices, key staples in the Sahel, will be below last year levels with improved supplies but will remain close to slightly above average until the lean season (June/July-September). Imported and local rice prices will remain above average in Coastal countries due to inflation and/or high fuel prices.

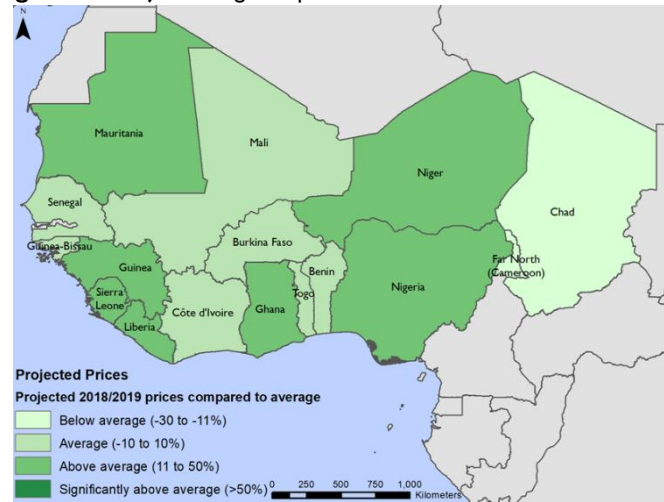
- The pastoral lean season, expected from March/April to June/July, will be normal. Identified pasture and water point deficit areas will be offset by herd movements to better supplied areas. However, an early transhumance could be expected from these areas, while insecurity and tensions between herders and farmers will disrupt livestock feeding and marketing in conflict zones. In livestock markets, demand will be significant during holiday periods, but overall demand will be near or below average. Prices will remain below average in the Eastern basin affected by limited exports to Nigeria, maintaining lower ToT. and are expected to remain similarly near or slightly below average elsewhere in the region. Cereal and livestock price projections in selected regional reference markets are illustrated in the figures below (Figure 16-23).

Figure 14. 2018/19 projected trade flows



Source: FEWS NET

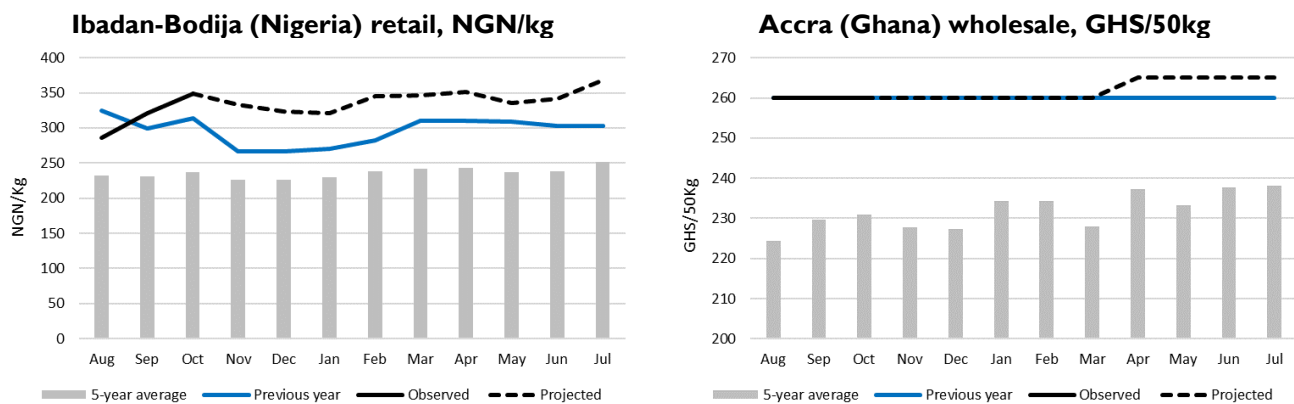
Figure 15. Projected regional price anomalies, 2018/19



Source: FEWS NET

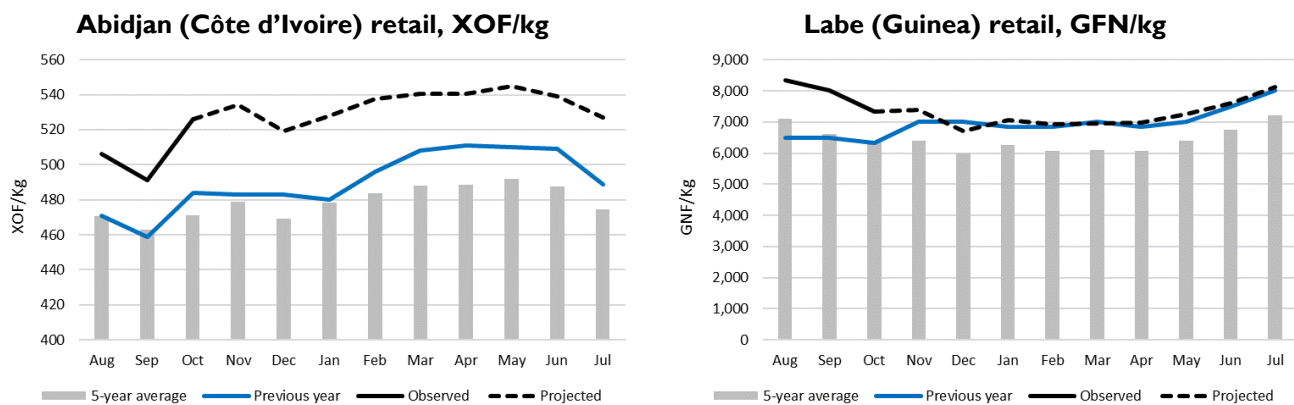
- In Nigeria, with global crude oil prices decreasing again, hitting a new low of 59.96 USD per barrel in November 2018 (OPEC), down by 20 percent since November 2017, and below the federally budgeted benchmark of 60 USD per barrel for 2019, there are concerns for the macroeconomic outlook. The moderation of inflation was largely seasonally driven, so prices could rise towards the end of the year. Additionally, the relative NGN stability was attributable to the Central Bank’s continued policy of increasing foreign exchange supplies (CBN), which may not be sustainable due to the likely decline in global crude oil prices as well as the decline in foreign reserves. Furthermore, with the general elections coming in the first quarter of 2019, more money is expected to be in circulation for campaign activities, further weakening exchange rates. In the northeast, reduced security and the resulting decreased trade activity will persist, with potential attacks during the election periods. Farmers have been targeted in attacks, further reducing the already limited harvests, which, in turn, will further negatively affect supply levels. Several households will remain in need of humanitarian assistance.

Figure 16. Imported rice price projections in selected markets for the 2018/19 marketing year



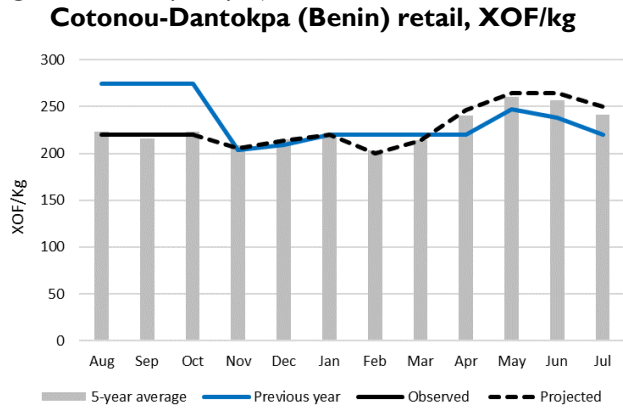
Source: Authors’ estimates based on FEWS NET- Nigeria and SRID/MOFA data (2018).

Figure 17. Local rice price projections in selected markets for the 2018/19 marketing year

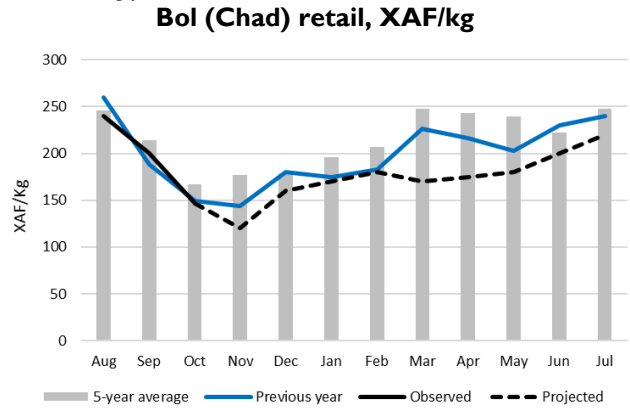


Source: Authors’ estimates based on Institut National de la Statistique, Côte d'Ivoire and WFP, Guinea data (2018).

Figure 18. Maize price projections in selected markets for the 2018/19 marketing year

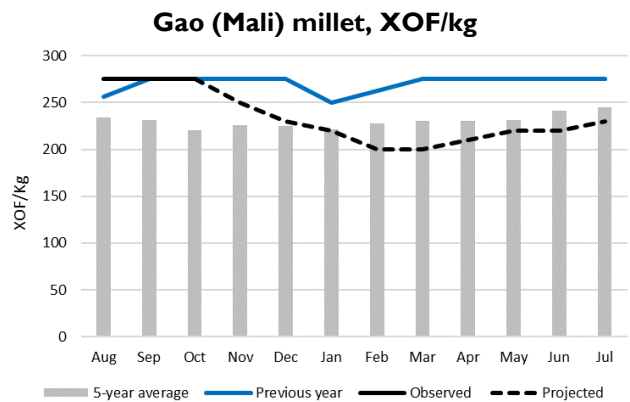
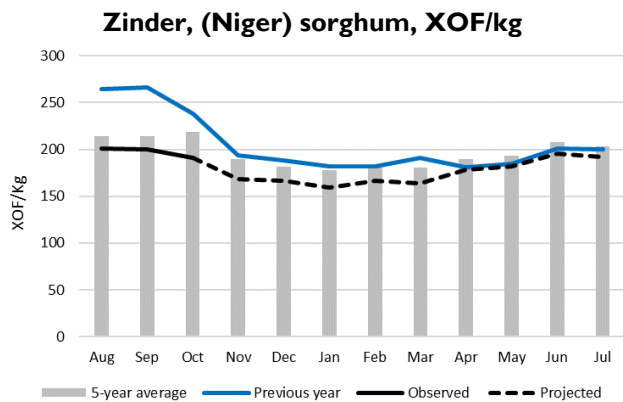


Source: CT-SAGSA, Benin



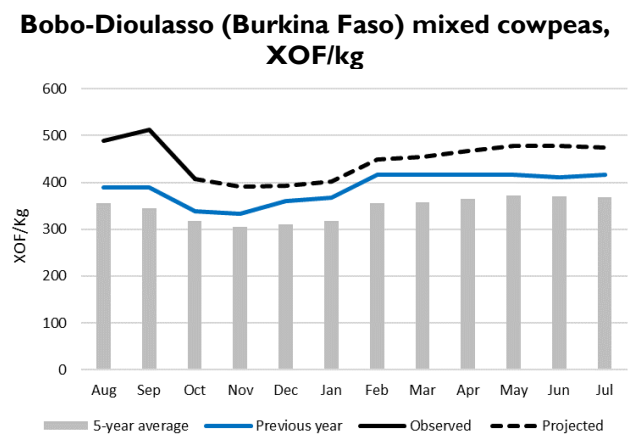
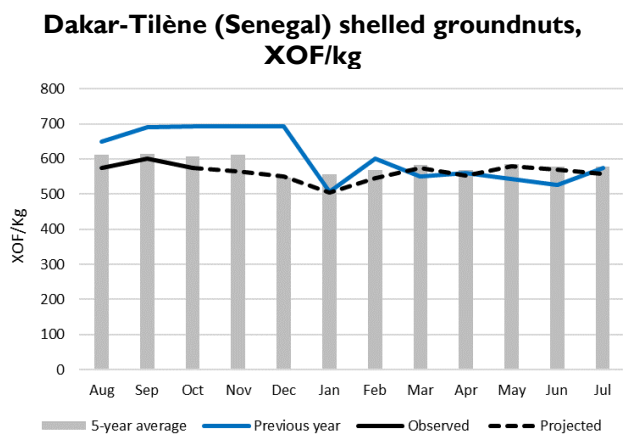
Source: FEWS NET- Chad

Figure 19. Sorghum and millet price projections in selected markets for the 2018/19 marketing year



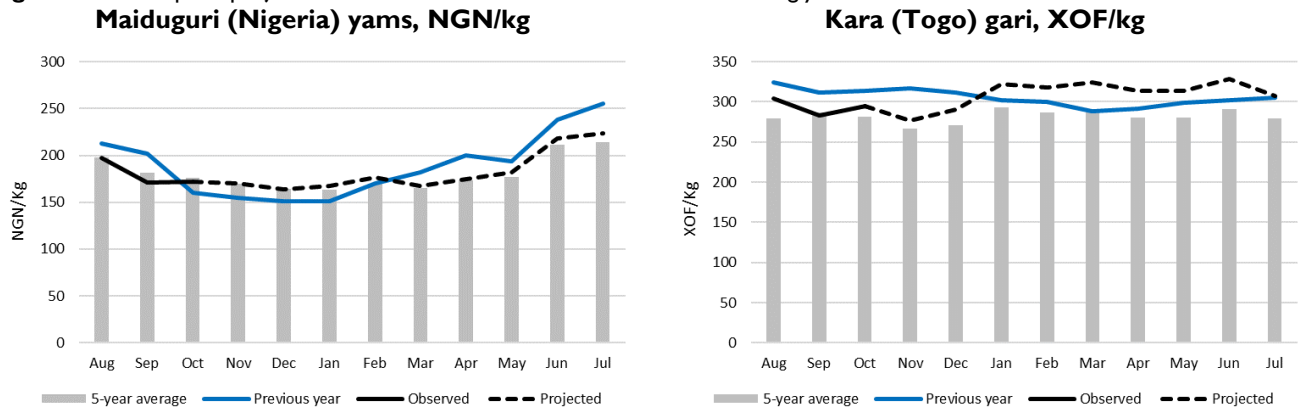
Source: Authors' estimates based on SIMA, Niger and OMA, Mali data (2018).

Figure 20. Cash crop price projections in selected markets for the 2018/19 marketing year



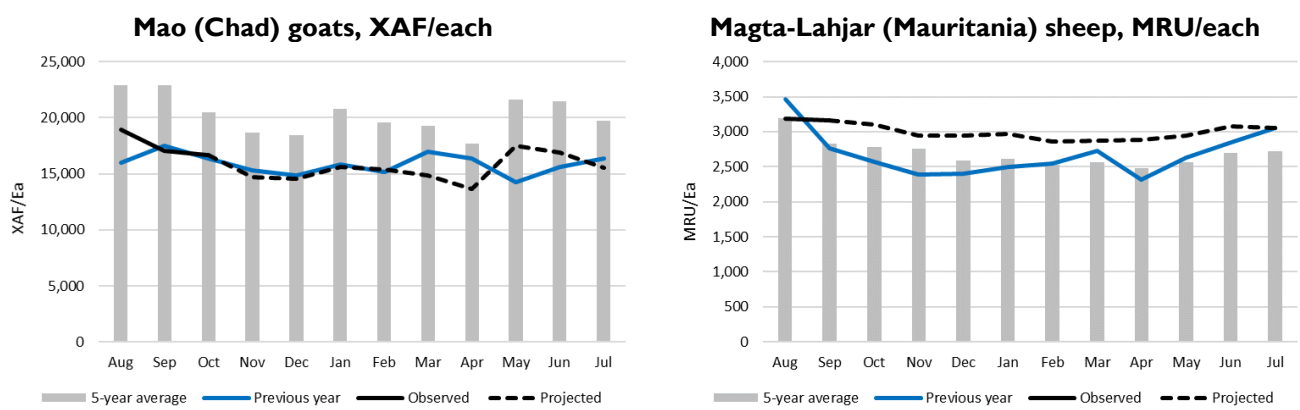
Source: Authors' estimates based on SIM/CSA, Senegal and SIM/SONAGESS, Burkina Faso data (2018).

Figure 21. Tuber price projections in selected markets for the 2018/19 marketing year



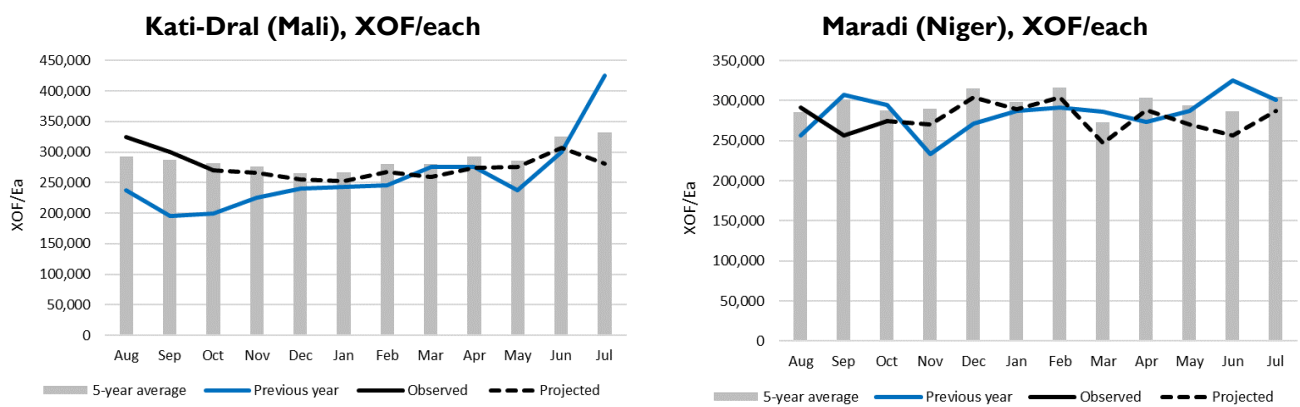
Source: Authors' estimates based FEWS NET- Nigeria and Ministère de l'Agriculture, de l'Elevage et de la Pêche, Togo data (2018).

Figure 22. Small ruminant price projections in selected markets for the 2018/19 marketing year



Source: Authors' estimates based on FEWS NET- Chad and FEWS NET- Mauritania data (2018).

Figure 23. Cattle (male) price projections in selected markets for the 2018/19 marketing year



Source: Authors' estimates based on SAP, Mali and SIM-Bétail, Niger data (2018).

FACTORS THAT MIGHT CHANGE THE OUTLOOK

Possible events over the next six months that could change the most-likely scenario.

Area	Event	Impact on market outcomes
All countries	Actual 2018/19 cereal production levels are significantly lower than suggested by preliminary estimates	<ul style="list-style-type: none"> Market supply levels will be lower than currently anticipated and households in rural areas will be more market dependent. Much higher cereal prices than currently projected during the 2018/19 marketing year.
	Increase of maize and rice production, further decrease of sorghum and millet production	<ul style="list-style-type: none"> Continuous spike of local “traditional” cereals especially in the Sahel. Above-average demand for maize and/or rice as a substitute for millet and sorghum.
	Atypical institutional purchases, particularly in countries lacking large exportable surpluses for the commodity purchased	<ul style="list-style-type: none"> Extended institutional purchase time (due to administrative procedures for instance) would likely push market prices to higher levels than currently anticipated.
	Significantly delayed start to the next 2019/20 rainy season	<ul style="list-style-type: none"> Traders might retain stocks as they would in a typical year in preparation for the new harvest, reducing market supplies during the peak of the agro-pastoral lean season. Market prices would rise to higher levels than projected. Livestock prices will continue to decrease due to worse animal body conditions.
All countries	Political instability, disease/epidemic breakout	<ul style="list-style-type: none"> Macroeconomic issues, particularly increasing inflation. Disruption of market and trade activities. Localized price spikes.
Countries that rely heavily on imports from international markets (Mauritania, Senegal, Sierra Leone, Liberia, Cote d’Ivoire, Ghana, Benin, Nigeria, Gambia)	New domestic policies restricting imports	<ul style="list-style-type: none"> Drastic reductions to imports from international markets. Traders increase regional market purchases. Reduced market supplies of imported products, which would put additional pressure on demand for locally produced commodities. Market prices would increase, for both imported and local products, to higher levels than currently anticipated in both affected countries, as well as neighboring countries where traders increase informal regional purchases.
	Continued depreciation of local currencies against the USD	<ul style="list-style-type: none"> Reduction in imports from international markets. Traders increase regional cereal purchases. Market prices would increase, for both imported and local products, to higher levels than currently anticipated in both affected countries, as well as neighboring countries where traders increase regional purchases.
Nigeria, Chad, Niger, Mali, Burkina Faso, and neighboring countries	Worsening conflict and civil insecurity	<ul style="list-style-type: none"> Increased number of IDPs and refugees in neighboring countries. Instability or closure of borders. Significant reduction of market functioning, decrease in flows, very low supplies in local markets. Atypical price movements. Disruption of pasture access and livestock trade. Reduced access to food by poor households in deficit areas. Severe deterioration of household livelihoods and food and nutrition security. Persistent and worsening levels of food insecurity in the Greater Lake Chad basin and the Liptako-Gourma region.

MARKET MONITORING INDICATORS FOR 2018/19 MARKETING YEAR

The analysis presented in this report relies mostly on aggregate production and trade figures and price data, but does not consider in much detail anticipated sub-national anomalies. Therefore, a certain number of key indicators should be monitored over the remainder of the marketing year.

Indicator	Justification
Staple prices	As a key market indicator, prices (weekly/monthly) should be continuously monitored in key production, wholesale, retail, and cross-border markets.
Market supply and demand	Supply and demand trends and factors are always critical to monitor and understand as price drivers.
Currency fluctuations	Levels of currencies throughout the region vis-à-vis the USD may influence import and export parity prices, especially for rice in Coastal countries.
Final crop production estimates	Significant changes in 2018/19 crop production estimates compared to preliminary estimates could significantly change the supply outlook. Furthermore, poorly distributed sub-national production could negatively affect marketing and trader behavior.
Off-season production	Off-season crops are important in market supplies and price determination during the season.
Stock levels	Stock quantities (including their retention and release) affect market supply/demand variations and prices.
Key areas of concern	The following areas should be monitored closely for market anomalies: i) the Greater Lake Chad basin, the Tibesti region, and the Liptako-Gourma region affected by civil insecurity, and ii) Southern part of the Western basin affected by deficits and inflation.
Consumption norms	The existing per capita consumption norms in the region need updates for more precise balance sheets.
Other cereal uses	To further enhance national and regional balance sheets, growing cereal demand quantities for poultry and fish production and industries should be regularly monitored and quantified.
Institutional purchases	Institutional purchases (both in time and space) and humanitarian assistance could have impacts on markets and prices.
Pastoral situation and livestock trade	The pastoral situation and livestock prices should be monitored in the Sahel, as livestock is the main asset and livelihood for rural households.
Nigeria's 2019 general elections	As Nigeria experienced electoral violence in the past, any pre or post-electoral trouble in 2019 could affect the already fragile macroeconomic state and the turmoil in the northeast.
Policy and economic developments in the region	Key policy, social, and macroeconomic events, at both national and international levels, could have significant regional market impacts.

Annex I. West Africa Total Cereal (maize, millet, sorghum, and rice) Supply Projections 2018/19 (MT)¹

Country	Item	2017/18	5-year Average (2013/14-2017/18)	2018/19 forecast	% change over one year	% change over 5-year average	Change one year	Change 5-year average
Benin	Harvest ²	1,639,618	1,372,056	1,858,271	13%	35%	▲	▲
Benin	Requirements ³	1,343,862	1,272,889	1,380,834	3%	8%	►	►
Benin	Self-sufficiency	122%	108%	135%	10%	25%	▲	▲
Burkina Faso	Harvest	3,347,489	3,650,671	4,102,655	23%	-8%	▲	►
Burkina Faso	Requirements	4,128,168	3,899,439	4,247,298	3%	9%	►	►
Burkina Faso	Self-sufficiency	81%	94%	97%	19%	3%	▲	►
Cape Verde	Harvest	0	3,598	3,308	N/A	-8%	N/A	►
Cape Verde	Requirements	89,586	87,412	90,720	1%	4%	►	►
Cape Verde	Self-sufficiency	0%	4%	4%	N/A	-11%	N/A	▼
Chad	Harvest	2,228,709	2,192,360	2,471,245	11%	13%	▲	▲
Chad	Requirements	2,164,773	2,038,419	2,229,774	3%	9%	►	►
Chad	Self-sufficiency	103%	108%	111%	8%	3%	►	►
Côte d'Ivoire	Harvest	2,298,979	2,244,921	2,491,701	8%	11%	►	▲
Côte d'Ivoire	Requirements	1,793,232	1,706,929	1,838,232	3%	9%	►	►
Côte d'Ivoire	Self-sufficiency	128%	132%	136%	6%	3%	►	►
Gambia	Harvest	94,933	140,505	73,981	-22%	-47%	▼	▼
Gambia	Requirements	344,076	324,326	354,326	3%	9%	►	►
Gambia	Self-sufficiency	28%	43%	21%	-24%	-52%	▼	▼
Ghana	Harvest	2,272,701	2,048,380	2,259,419	11%	23%	▲	▲
Ghana	Requirements	2,858,008	2,736,372	2,919,409	2%	7%	►	►
Ghana	Self-sufficiency	80%	75%	87%	9%	16%	►	▲
Guinea	Harvest	2,133,988	1,974,601	2,216,642	4%	12%	►	▲
Guinea	Requirements	2,075,427	1,973,602	2,130,282	3%	8%	►	►
Guinea	Self-sufficiency	103%	100%	104%	1%	4%	►	►
Guinea Bissau	Harvest	127,344	128,149	136,099	7%	6%	►	►
Guinea Bissau	Requirements	318,469	303,270	326,318	2%	8%	►	►
Guinea Bissau	Self-sufficiency	40%	42%	42%	4%	-1%	►	►
Liberia	Harvest	163,685	160,969	141,897	-13%	-12%	▼	▼
Liberia	Requirements	601,896	572,636	617,272	3%	8%	►	►
Liberia	Self-sufficiency	27%	28%	23%	-15%	-18%	▼	▼
Mali	Harvest	7,026,237	5,812,613	7,880,914	12%	36%	▲	▲
Mali	Requirements	3,898,032	3,675,084	4,016,556	3%	9%	►	►
Mali	Self-sufficiency	180%	158%	196%	9%	24%	►	▲
Mauritania	Harvest	216,712	208,794	263,993	22%	26%	▲	▲
Mauritania	Requirements	335,960	318,307	344,914	3%	8%	►	►
Mauritania	Self-sufficiency	65%	66%	77%	19%	17%	▲	▲
Niger	Harvest	4,947,805	4,451,617	5,033,252	2%	13%	►	▲
Niger	Requirements	5,019,975	4,657,777	5,214,825	4%	12%	►	▲
Niger	Self-sufficiency	99%	96%	97%	-2%	1%	►	►

¹ Data for the 2018/19 marketing year are FEWS NET estimates as of December 2018; ► denotes less than or equal to 10 percent change; ▲ denotes greater than 10 percent increase; ▼ denotes greater than 10 percent decrease.

² Considers production estimates minus post-harvest losses and seed requirements. A conversion factor of .85 is applied to raw production estimates for all products except rice. Rice is expressed in milled equivalent, using .55 as the conversion factor.

³ The commodity requirement estimates in this report consider human consumption requirements only.

Country	Item	2017/18	5-year Average (2013/14- 2017/18)	2018/19 forecast	% change over one year	% change over 5-year average	Change one year	Change 5-year average
Nigeria	Harvest	21,496,120	19,349,390	22,778,290	6%	18%	►	▲
Nigeria	Requirements	24,092,625	22,887,665	24,718,326	3%	8%	►	►
Nigeria	Self-sufficiency	89%	85%	92%	3%	9%	►	►
Senegal	Harvest	1,877,843	1,393,653	2,030,097	8%	46%	►	▲
Senegal	Requirements	2,786,274	2,636,126	2,863,224	3%	9%	►	►
Senegal	Self-sufficiency	67%	53%	71%	5%	34%	►	▲
Sierra Leone	Harvest	831,113	677,452	836,099	1%	23%	►	▲
Sierra Leone	Requirements	841,480	806,368	859,247	2%	7%	►	►
Sierra Leone	Self-sufficiency	99%	84%	97%	-1%	16%	►	▲
Togo	Harvest	1,060,650	979,030	1,091,478	3%	11%	►	▲
Togo	Requirements	998,875	951,027	1,023,250	2%	8%	►	►
Togo	Self-sufficiency	106%	103%	107%	0%	4%	►	►
Regional Total	Harvest	51,763,934	46,788,769	55,939,348	8%	20%	►	▲
Regional Total	Requirements	53,690,718	50,847,655	55,174,733	3%	9%	►	►
Regional Total	Self-sufficiency	96%	92%	101%	5%	10%	►	▲

Annex 2. West Africa Maize Supply Projections 2018/19 (MT)⁴

Country	Item	2017/18	5-year Average (2013/14-2017/18)	2018/19 Forecast	% change over one year	% change over 5-year average	Change one year	Change 5-year average
Benin	Harvest	1,287,676	1,119,757	1,309,770	2%	17%	►	▲
Benin	Requirements	792,534	750,678	814,338	3%	8%	►	►
Benin	Self-sufficiency	162%	149%	161%	-1%	8%	►	►
Burkina Faso	Harvest	1,303,416	1,293,902	1,516,991	16%	17%	▲	▲
Burkina Faso	Requirements	553,056	522,412	569,016	3%	9%	►	►
Burkina Faso	Self-sufficiency	236%	248%	267%	13%	8%	▲	►
Cape Verde	Harvest	0	3,598	3,308	N/A	-8%	N/A	►
Cape Verde	Requirements	68,019	66,368	68,880	1%	4%	►	►
Cape Verde	Self-sufficiency	0%	5%	5%	N/A	-11%	N/A	▼
Chad	Harvest	377,030	329,912	370,783	10%	12%	▲	▲
Chad	Requirements	230,295	216,853	237,210	3%	9%	►	►
Chad	Self-sufficiency	146%	152%	156%	7%	3%	►	►
Côte d'Ivoire	Harvest	822,116	810,825	941,159	14%	16%	▲	▲
Côte d'Ivoire	Requirements	572,838	545,269	587,213	3%	8%	►	►
Côte d'Ivoire	Self-sufficiency	144%	149%	160%	12%	8%	▲	►
Gambia	Harvest	18,224	26,233	15,359	-16%	16%	▼	▼
Gambia	Requirements	17,312	16,318	17,824	3%	8%	►	►
Gambia	Self-sufficiency	157%	161%	86%	-18%	8%	▼	▼
Ghana	Harvest	1,390,058	1,257,369	1,583,904	14%	26%	▲	▲
Ghana	Requirements	1,325,880	1,269,451	1,354,365	2%	7%	►	►
Ghana	Self-sufficiency	105%	99%	117%	12%	18%	▲	▲
Guinea	Harvest	694,693	625,742	695,762	0%	11%	►	▲
Guinea	Requirements	496,014	471,678	509,124	3%	8%	►	►
Guinea	Self-sufficiency	140%	133%	137%	-2%	3%	►	►
Guinea Bissau	Harvest	5,619	5,011	6,181	10%	23%	▲	▲
Guinea Bissau	Requirements	20,977	19,975	21,494	2%	8%	►	►
Guinea Bissau	Self-sufficiency	27%	25%	29%	7%	3%	►	►
Liberia	Harvest	0	0	0	N/A	N/A	N/A	N/A
Liberia	Requirements	19,416	18,472	19,912	3%	8%	►	►
Liberia	Self-sufficiency	0%	0%	0%	N/A	N/A	N/A	N/A
Mali	Harvest	3,058,474	2,028,502	3,395,319	11%	67%	▲	▲
Mali	Requirements	382,160	360,302	393,780	3%	9%	►	►
Mali	Self-sufficiency	800%	563%	862%	8%	53%	►	▲
Mauritania	Harvest	8,410	10,040	9,967	19%	-1%	▲	►
Mauritania	Requirements	9,080	8,602	9,322	3%	8%	►	►
Mauritania	Self-sufficiency	93%	117%	107%	15%	-8%	▲	►
Niger	Harvest	5,423	5,938	4,948	-9%	-17%	►	▼
Niger	Requirements	156,177	144,908	162,239	4%	12%	►	▲
Niger	Self-sufficiency	3%	4%	3%	-12%	-26%	▼	▼
Nigeria	Harvest	10,203,952	8,912,182	10,845,991	6%	22%	►	▲
Nigeria	Requirements	5,092,750	4,838,043	5,225,012	3%	8%	►	►
Nigeria	Self-sufficiency	200%	184%	208%	4%	13%	►	▲

⁴ Data for the 2017/18 marketing year are FEWS NET estimates as of December 2017; ► denotes less than or equal to 10 percent change; ▲ denotes greater than 10 percent increase; ▼ denotes greater than 10 percent decrease.

Country	Item	2017/18	5-year Average (2013/14- 2017/18)	2018/19 Forecast	% change over one year	% change over 5-year average	Change one year	Change 5-year average
Senegal	Harvest	348,809	258,358	405,127	16%	57%	▲	▲
Senegal	Requirements	195,528	184,991	200,928	3%	9%	►	►
Senegal	Self-sufficiency	178%	140%	202%	13%	44%	▲	▲
Sierra Leone	Harvest	12,307	18,782	34,698	182%	85%	▲	▲
Sierra Leone	Requirements	15,440	14,795	15,766	2%	7%	►	►
Sierra Leone	Self-sufficiency	80%	127%	220%	176%	73%	▲	▲
Togo	Harvest	726,485	680,323	753,635	4%	11%	►	▲
Togo	Requirements	511,424	486,925	523,904	2%	8%	►	►
Togo	Self-sufficiency	142%	140%	144%	1%	3%	►	►
Regional Total	Harvest	20,222,697	17,386,480	21,892,910	8%	26%	►	▲
Regional Total	Requirements	10,458,900	9,936,048	10,730,327	3%	8%	►	►
Regional Total	Self-sufficiency	193%	175%	204%	6%	17%	►	▲

Source: Authors' calculations based on FEWS NET/WFP estimates, national statistics, and CILSS (2018) data.

Annex 3. West Africa Millet and Sorghum Supply Projections 2017/18 (MT)⁵

Country	Item	2017/18	5-year Average (2013/14-2017/18)	2018/19 forecast	% change over one year	% change over 5-year average	Change one year	Change 5-year average
Benin	Harvest	153,227	123,646	296,484	93%	140%	▲	▲
Benin	Requirements	264,178	250,226	271,446	3%	8%	►	►
Benin	Self-sufficiency	58%	49%	109%	88%	121%	▲	▲
Burkina Faso	Harvest	1,865,012	2,173,290	2,398,257	29%	10%	▲	►
Burkina Faso	Requirements	2,864,040	2,705,353	2,946,690	3%	9%	►	►
Burkina Faso	Self-sufficiency	65%	27%	26%	-61%	-6%	▼	►
Cape Verde	Harvest	0	0	0	0%	0%	N/A	N/A
Cape Verde	Requirements	0	0	0	0%	0%	N/A	N/A
Cape Verde	Self-sufficiency	0%	0%	0%	0%	0%	N/A	N/A
Chad	Harvest	1,746,725	1,703,269	1,953,639	12%	15%	▼	►
Chad	Requirements	1,765,595	1,662,541	1,818,610	3%	9%	►	►
Chad	Self-sufficiency	99%	102%	107%	9%	5%	►	►
Côte d'Ivoire	Harvest	99,766	93,308	111,477	12%	19%	▲	▲
Côte d'Ivoire	Requirements	74,718	71,122	76,593	3%	8%	►	►
Côte d'Ivoire	Self-sufficiency	134%	131%	146%	9%	11%	►	▲
Gambia	Harvest	60,227	85,130	44,095	-27%	-48%	▼	▼
Gambia	Requirements	77,904	73,432	80,208	3%	9%	►	►
Gambia	Self-sufficiency	77%	116%	55%	-29%	-53%	▼	▼
Ghana	Harvest	384,735	361,406	406,095	6%	12%	►	▲
Ghana	Requirements	500,888	479,570	511,649	2%	7%	►	►
Ghana	Self-sufficiency	77%	75%	79%	3%	5%	►	►
Guinea	Harvest	230,447	215,214	234,019	2%	9%	►	▲
Guinea	Requirements	78,318	74,476	80,388	3%	8%	►	►
Guinea	Self-sufficiency	294%	289%	291%	-1%	1%	►	►
Guinea Bissau	Harvest	30,919	28,059	33,222	7%	18%	▲	►
Guinea Bissau	Requirements	49,582	47,216	50,804	2%	8%	►	►
Guinea Bissau	Self-sufficiency	62%	59%	65%	5%	10%	►	▲
Liberia	Harvest	0	0	0	N/A	N/A	N/A	N/A
Liberia	Requirements	0	0	0	N/A	N/A	N/A	N/A
Liberia	Self-sufficiency	0%	0%	0%	N/A	N/A	N/A	N/A
Mali	Harvest	2,478,607	2,467,317	2,733,997	10%	11%	▲	▲
Mali	Requirements	2,063,664	1,945,633	2,126,412	3%	9%	►	►
Mali	Self-sufficiency	120%	127%	129%	7%	1%	►	►
Mauritania	Harvest	42,920	65,124	76,659	79%	18%	▼	▼
Mauritania	Requirements	118,040	111,838	121,186	3%	9%	►	►
Mauritania	Self-sufficiency	36%	58%	63%	74%	9%	▲	►
Niger	Harvest	4,874,141	4,381,946	4,959,010	2%	13%	▼	▼
Niger	Requirements	4,462,200	4,140,247	4,635,400	4%	12%	►	▲
Niger	Self-sufficiency	109%	106%	107%	-2%	1%	►	►
Nigeria	Harvest	6,982,852	6,507,024	7,310,451	5%	12%	▲	▲
Nigeria	Requirements	13,123,625	12,467,265	13,464,454	3%	8%	►	►
Nigeria	Self-sufficiency	53%	52%	54%	2%	4%	►	►

⁵ Data for the 2017/18 marketing year are FEWS NET estimates as of December 2017; ► denotes less than or equal to 10 percent change; ▲ denotes greater than 10 percent increase; ▼ denotes greater than 10 percent decrease.

Country	Item	2017/18	5-year Average (2013/14- 2017/18)	2018/19 forecast	% change over one year	% change over 5-year average	Change one year	Change 5- year average
Senegal	Harvest	927,329	676,145	950,956	3%	41%	▶	▲
Senegal	Requirements	1,010,228	955,789	1,038,128	3%	9%	▶	▶
Senegal	Self-sufficiency	92%	71%	92%	0%	29%	▶	▲
Sierra Leone	Harvest	48,030	55,509	41,788	-13%	-25%	▲	▼
Sierra Leone	Requirements	61,760	59,183	63,064	2%	7%	▶	▶
Sierra Leone	Self-sufficiency	78%	94%	66%	-15%	-29%	▼	▼
Togo	Harvest	256,879	268,876	257,824	0%	-4%	▲	▲
Togo	Requirements	287,676	273,896	194,696	2%	8%	▶	▶
Togo	Self-sufficiency	89%	98%	87%	-2%	-11%	▶	▼
Regional Total	Harvest	20,181,815	19,205,265	21,808,230	8%	14%	▲	▲
Regional Total	Requirements	26,684,376	25,205,948	27,458,542	3%	9%	▶	▶
Regional Total	Self-sufficiency	76%	76%	79%	5%	4%	▶	▶

Source: Authors' calculations based on FEWS NET/WFP estimates, national statistics, and CILSS (2018) data.

Annex 4. West Africa Rice (milled) Supply Projections 2018/19 (MT)⁶

Country	Item	2017/18	5-year Average (2013/14-2017/18)	2018/19 forecast	% change over one year	% change over 5-year average	Change one year	Change 5-year average
Benin	Harvest	198,715	128,653	252,016	27%	96%	▲	▲
Benin	Requirements	287,150	271,984	295,050	3%	8%	►	►
Benin	Self-sufficiency	69%	47%	85%	23%	81%	▲	▲
Burkina Faso	Harvest	179,061	183,478	187,406	5%	2%	►	►
Burkina Faso	Requirements	711,072	671,673	731,592	3%	9%	►	►
Burkina Faso	Self-sufficiency	25%	27%	26%	2%	-6%	►	►
Cape Verde	Harvest	0	0	0	N/A	N/A	N/A	N/A
Cape Verde	Requirements	21,567	21,043	21,840	1%	4%	►	►
Cape Verde	Self-sufficiency	0	0	0	N/A	N/A	N/A	N/A
Chad	Harvest	144,955	159,180	146,822	1%	-8%	►	►
Chad	Requirements	168,883	159,025	173,954	3%	9%	►	►
Chad	Self-sufficiency	86%	100%	84%	-2%	-16%	►	▼
Côte d'Ivoire	Harvest	1,377,096	1,340,788	1,439,065	4%	7%	►	►
Côte d'Ivoire	Requirements	1,145,676	1,090,538	1,174,426	3%	8%	►	►
Côte d'Ivoire	Self-sufficiency	120%	123%	123%	2%	0%	►	►
Gambia	Harvest	16,481	29,140	14,527	-12%	-50%	▼	▼
Gambia	Requirements	248,860	234,575	256,220	3%	9%	►	►
Gambia	Self-sufficiency	48%	44%	6%	-14%	-54%	▼	▼
Ghana	Harvest	497,908	429,606	539,163	8%	26%	►	▲
Ghana	Requirements	1,031,240	987,350	1,053,395	2%	7%	►	►
Ghana	Self-sufficiency	48%	44%	51%	6%	18%	►	▲
Guinea	Harvest	1,280,848	1,133,645	1,286,860	6%	14%	►	▲
Guinea	Requirements	1,501,095	1,427,448	1,540,770	3%	8%	►	►
Guinea	Self-sufficiency	81%	79%	84%	4%	5%	►	►
Guinea Bissau	Harvest	90,806	95,078	96,696	6%	2%	►	►
Guinea Bissau	Requirements	247,910	236,079	254,020	2%	8%	►	►
Guinea Bissau	Self-sufficiency	37%	40%	38%	4%	-5%	►	►
Liberia	Harvest	163,685	160,969	141,897	-13%	-12%	▼	▼
Liberia	Requirements	582,480	554,164	597,360	3%	8%	►	►
Liberia	Self-sufficiency	28%	29%	24%	-15%	-18%	▼	▼
Mali	Harvest	1,489,156	1,316,793	1,751,598	18%	33%	▲	▲
Mali	Requirements	1,452,208	1,369,148	1,496,364	3%	9%	►	►
Mali	Self-sufficiency	103%	96%	117%	14%	22%	▲	▲
Mauritania	Harvest	165,381	133,630	177,366	7%	33%	►	▲
Mauritania	Requirements	208,840	197,866	214,406	3%	8%	►	►
Mauritania	Self-sufficiency	79%	68%	83%	4%	22%	►	▲
Niger	Harvest	68,240	69,879	69,293	2%	-1%	►	►
Niger	Requirements	401,598	372,622	417,186	4%	12%	►	▼
Niger	Self-sufficiency	17%	19%	17%	-2%	-11%	►	▼
Nigeria	Harvest	4,309,316	3,930,184	4,621,848	7%	18%	►	▲
Nigeria	Requirements	5,876,250	5,582,357	6,028,869	3%	8%	►	►
Nigeria	Self-sufficiency	73%	70%	77%	5%	9%	►	►

⁶ Data for the 2017/18 marketing year are FEWS NET estimates as of December 2017; ► denotes less than or equal to 10 percent change; ▲ denotes greater than 10 percent increase; ▼ denotes greater than 10 percent decrease.

Country	Item	2017/18	5-year Average (2013/14- 2017/18)	2018/19 forecast	% change over one year	% change over 5-year average	Change one year	Change 5- year average
Senegal	Harvest	601,705	459,150	674,013	12%	47%	▲	▲
Senegal	Requirements	1,580,518	1,495,346	1,624,168	3%	9%	▶	▶
Senegal	Self-sufficiency	38%	31%	41%	9%	35%	▶	▲
Sierra Leone	Harvest	770,776	619,242	759,613	-1%	23%	▼	▲
Sierra Leone	Requirements	764,280	732,389	780,417	2%	7%	▶	▶
Sierra Leone	Self-sufficiency	101%	85%	97%	-3%	15%	▶	▲
Togo	Harvest	77,285	80,464	80,018	4%	-1%	▶	▶
Togo	Requirements	199,775	190,205	204,650	2%	8%	▶	▶
Togo	Self-sufficiency	141%	142%	154%	1%	-8%	▶	▶
Regional Total	Harvest	11,359,422	10,269,887	12,238,208	8%	19%	▶	▲
Regional Total	Requirements	16,429,402	15,593,821	16,864,678	3%	8%	▶	▶
Regional Total	Self-sufficiency	69%	66%	73%	5%	10%	▶	▲

Source: Authors' calculations based on FEWS NET/WFP estimates, national statistics, and CILSS (2018) data.

Annex 5. El Niño and global cereal supplies

Global commodity markets remain well supplied with rice, wheat, and maize (Figure 24). These supplies are expected to remain above average in 2018/19 despite expectations for lower wheat production as heat waves reduced yields for major producers in Eastern Europe and Central Asia. The U.S. Department of Agriculture’s (USDA) September 2018 to August 2019 projections for wheat, maize, and rice supply, point to these being almost identical to previous season levels (World Bank). Stock-to-use ratios are projected to remain at near record levels for rice and wheat, but will be lower for maize.

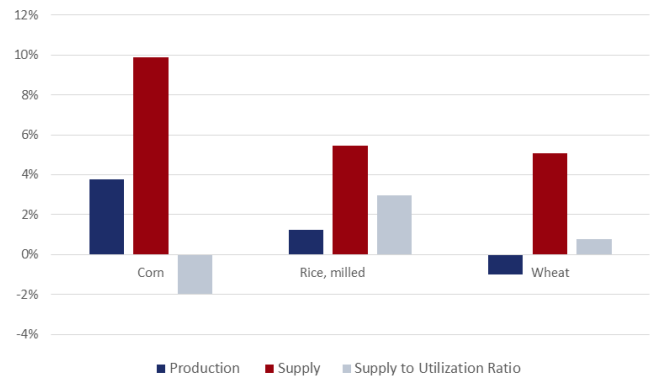
Global cereal prices tightened in the first half of 2018 but began easing by the third quarter from growing trade tensions and improved supply conditions. Prices are expected to maintain this trend through the end of year (Figure 25). A marginal increase is projected for cereal prices in 2019 (World Bank).

Key risks for the global cereal market include high energy and fertilizer prices, growing trade tensions, strengthening of the US dollar, currency depreciation in emerging and developing economies, domestic support policies, and weather patterns in major producing and exporting countries.

An El Niño is expected to form and continue through the Northern Hemisphere winter (80 percent chance), and into the spring (55-60 percent chance) (NOAA). The impact of this forecast will vary geographically (Figure 26).

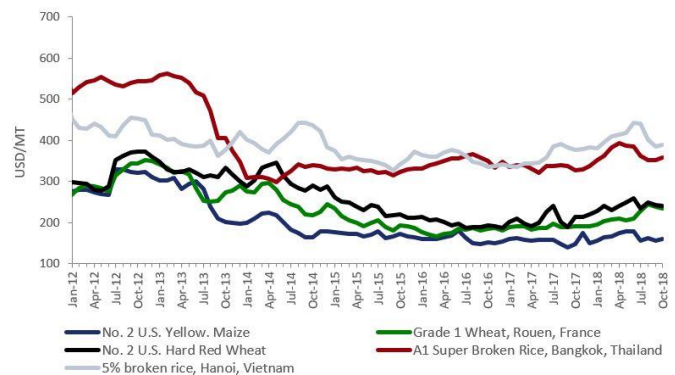
FEWS NET will continue to monitor the global commodity situation in the coming months as global 2019 commodity supply estimates by the USDA, International Grains Council (IGC), the FAO, and AMIS are updated.

Figure 24. Global Market Indicators, 2018/19 compared to 2013/14 - 2017/18 average



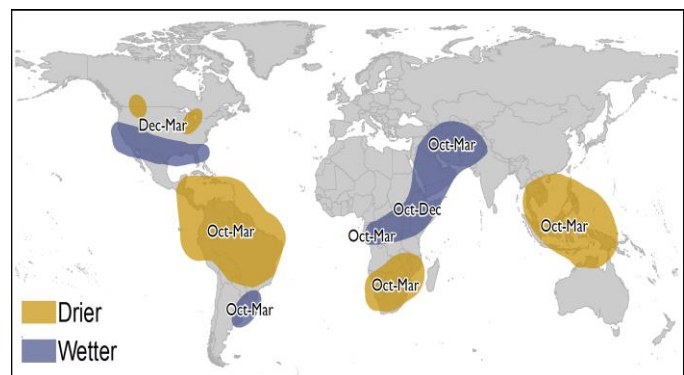
Source: FEWS NET calculations based on USDA 2018.

Figure 25. Global Commodity prices (USD/MT) 2012-2018



Source: Food and Agriculture Organization of the United Nations (FAO), World Bank, 2018

Figure 26. Typical Global El Niño Impacts, October - March



Source: FEWSNET

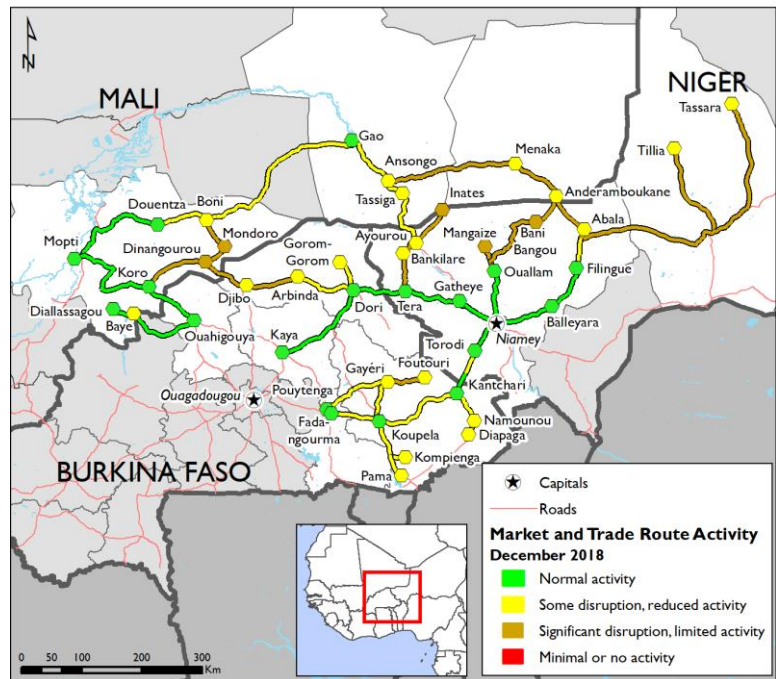
Annex 6. The Liptako-Gourma region

Liptako-Gourma region is a semi-arid area of the West African Sahel that straddles central and northeastern Mali, northern and eastern Burkina Faso, and western Niger. Agriculture, livestock herding, fishing, mining, and natural resources’ management are the main livelihood activities. Covering about 370,000 km², the tri-border region is among the most isolated and deprived of the three countries (ALG). Although the overall area of the region is greater, the present analysis mainly focuses on markets in the administrative regions of Mopti, Gao, and Menaka in Mali; Centre-Est, Centre-Nord, Est, Nord, and Sahel in Burkina Faso; and Tillaberi and Tahoua in Niger (Figure 27).

Current situation

In addition to difficult agro-climatic conditions and limited livelihoods, Liptako-Gourma region has been affected by civil insecurity and humanitarian crises as triggered by the conflict and militancy in Mali and the broader Sahel since the early 2010s. Scores of terrorist attacks have been recorded in the tri-border region in less than a year as well as bloody community conflicts, affecting social services (especial schools and health centers) and bringing about important population displacements. Latest internally displacement population (IDP) assessments in October 2018 recorded about 39,700 people in the Sahel region of Burkina Faso (OCHA); about 47,500 people in Mopti, Gao, and Menaka regions of Mali (IOM-DTM); and 48,700 in Tillaberi and Tahoua regions of Niger (HR). Various tightened security measures were taken by the different governments in or around areas of the tri-border region, including state of emergency, partial or full border closures, and vehicle and motorbike traffic restrictions. These resulted in impeding normal market and trade activities and further limiting livelihoods.

Figure 27. Liptako-Gourma market functioning map



Source: FEWS NET

Overall, the latest 2018/19 agro-pastoral season was satisfactory in the region in terms of rainfall and biomass and crop production. Projected gross cereal production in the focus areas was altogether about 3.5 MMT⁷, which is substantially above both last year and the average. However, insecurity and conflict have prevented crop production in key production zones like in Koro, Mali. Market functioning is below normal in the tri-border region, with several markets experiencing some disruption and reduced activity to significant disruption and limited activity (Figure 27). Moreover, major internal and cross-border flows are reduced or limited due to attacks and armed robberies on one hand, and tightened security controls and restricted traffic on the other. Hence, market supplies are below average. Demand is also currently below average due to lower presence of market actors and households’ own consumption from harvest. Coarse grain prices are currently seasonally decreasing to below last year in several markets but remain above average.

⁷ Aggregated with sub-national production data from Cellule de la Planification et de la Statistique/Ministère de l’Agriculture (Mali), Direction Nationale de la Statistique Sectorielles/Ministère de l’Agriculture et des et des Aménagements Hydrauliques (Burkina Faso), and Direction des Statistiques/Ministère de l’Agriculture et de l’Elevage (Niger).

The pastoral situation in the Liptako-Gourma region is characterized by pasture availability above last year thanks to good rainfall, despite localized dry areas. Nevertheless, access to both pastures and water points are limited by conflict and insecurity-induced livestock rustling in several areas. Livestock market activities are considerably reduced, with below average sales and overall lower than average prices and terms of trade. These trends are due to insecurity, but also to the state of emergency, and the persisting NGN depreciation, which makes making exports to Nigeria unprofitable and thus reduces the presence of export traders in various markets. Pastoralists have adopted alternative and even reversed trade circuits, notably animals are coming from Niger into Dori market in Burkina Faso; and from Gao towards southern Malian markets and Côte d'Ivoire.

Outlook

Despite national and collaborative multi-national efforts, security incidents will persist in Liptako-Gourma region in the upcoming months. These in addition to tightened security measures will continue to impact market functioning and maintain both internal and external flows at below normal rates throughout MY 2018/19. Nevertheless, market supplies are expected to increase in production zones with ongoing harvests, as farmers will need liquidity. Local demand for food consumption will decrease due to limited physical access to the markets and livelihoods and below normal economic activity. Atypical above-average prices will remain through the start of the lean season, especially in remote and isolated markets along the three borders. Reduced livestock exports will also persist, especially for cattle (the main export livestock product), leading to below average animal prices. As the usual transhumance corridors are not secure, pastoralists will continue adopting alternative routes and detours – thus creating or exacerbating conflict with farmers. IDPs and people in need of humanitarian assistance could increase in the upcoming months, and food aid will be limited to only the ones in accessible areas.