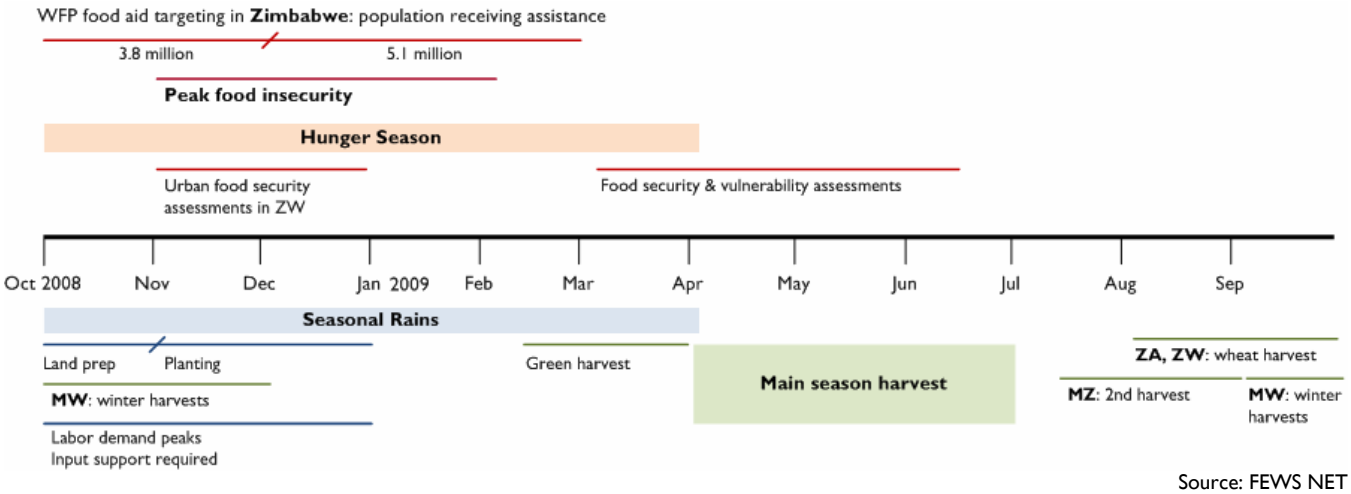
SOUTHERN AFRICA Food Security Update — March 2009

- Harvests of seasonal food crops (including green maize) have begun, and food security conditions are gradually improving, especially for those households dependent on crop production as a food and income source. Food prices however, remain higher than normal for this time of the year, a situation that will continue to pose a threat to the food security of poorer households in urban areas and in rural areas where the rains have fared poorly this season.

- The 2008/09 seasonal rainfall performance has been largely satisfactory for crop development across the region, and overall, regional agricultural production prospects remain favorable. Crop conditions are relatively good in most parts, although some localized areas received excessive rains in the second half of the season that led to flooding, while mid season dry spells in other areas in February led to moisture stress and wilting in crops, and in extreme cases, crop failure. Livestock and pastures are reported in good condition in most areas across the region.

- Moderate to heavy rains received in the central parts of the region led to flooding and washed away cropped areas in many low lying areas along the major river basins, necessitating emergency interventions by governments and humanitarian agencies. In Zambia, heavy rains in the western parts of the country led to extensive flooding, damaging infrastructure and inundating residential and cropped areas. Heavy rains caused extensive flooding in southern Angola and northern Namibia over the Cuvelai Basin, with loss of lives, and destruction of infrastructure, crops and livestock. Heavy rains in Angola and Namibia led to extensive flooding in northern Botswana. However reduced rainfall activity in the latter part of March has brought some relief, facilitating easier access to affected populations and where possible, the salvaging of cropped areas.

Seasonal calendar and critical events timeline



Source: FEWS NET

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Food security summary

The hunger season is gradually coming to an end as the availability of early maize harvests and other seasonal crops increases both on farm as well as on local markets across most parts of the region. However, food prices remain higher than normal for this time of the year, a situation that will continue to pose a threat to food security for poorer households in urban areas and rural areas that have experienced poor crop growing conditions. By the end of March, early planted maize was already being harvested (as green maize), and this, together with other available seasonal food crops, is contributing to a gradual improvement in food security conditions, especially for those households dependent on crop production as a primary food and income source. Field reports confirm that such improvements currently prevail in most parts of the region - including those areas where planting had been delayed due to the late onset of rains, or where the start of season was a bit erratic. For example, in the southern and central zones of Mozambique, recently harvested crops are reportedly available in local markets, while in Zambia, pressure on available supplies is easing off in non flood-affected areas due to the increasing variety of available food, including green maize, groundnuts, squashes, and mushrooms.

National level, food stocks have remained relatively stable in Tanzania and South Africa, where last season's production was sufficient to meet domestic food requirements. In South Africa, current demand/supply projections indicate that the country is likely to have a carryover surplus of 1.928 million MT of maize at the end of April, while in Tanzania, the National Food Reserve Agency reported to have stocks of 120,267 MT of maize and 6,509 MT of sorghum at the end March. These stocks are sufficient to enable the government of Tanzania to intervene and mitigate food shortages in the 40 districts in bi-modal areas where the short rains (*vuli*) season performed poorly.

For a majority of SADC countries, however, the hunger period saw a marked tightening of national level stocks, resulting in steep price hikes that are yet to stabilize and begin to decline. This includes countries such as Malawi, Zambia, and to some extent, Mozambique. In these countries, despite projections of sufficient national availability of major cereals at the start of the marketing year, maize shortages were widely reported (although sometimes, only in localized areas). In the structurally grain deficit countries of Botswana, Lesotho, Namibia, and Swaziland, national supplies have remained adequate on the aggregate, with import deliveries performing quite satisfactorily. By mid-April, these countries had received most (if not all) of their planned imports. In Zimbabwe, which has been facing the most critical shortages, national level food availability improved markedly since November, following the government's relaxation of some of its restrictive trade policies, and allowance of certain trade to be transacted in foreign currency.

Nominal retail cereal prices in most countries in the region are reported to have remained significantly higher than last year's levels and in all cases above the five-year average. Whereas normally, prices should begin to decline as early harvests come into local markets, this season, several of the monitored markets have registered increases in the period between February and March. The recent price increases are unseasonable for most markets, as March marks the end of the hunger season when hitherto scarce cereal commodities are augmented with seasonal crops. Reasons for these increases vary from country to country, but in the main, they are indicative of continuing pressure on available supplies of food in the concerned markets due perhaps to a delay in the green harvest, and as food aid distributions to needy populations are prematurely curtailed due to under resourced pipelines.

Food aid distributions and other humanitarian interventions targeted at vulnerable populations facing food shortages have nonetheless contributed significantly to stabilize food security conditions in localized areas facing reduced harvests from last season, as well as those affected by the recent (February/March) flooding. Apart from emergency food aid distributions, targeted interventions include: maize grain price subsidies to millers (Zambia); rationing of maize purchases at ADMARC markets (Malawi); increased coverage of government public works programs (Malawi); and increased commercial maize imports, dollarization of the economy, and provision of allowances to civil servant in hard currency (Zimbabwe). In Tanzania, in response to the failed *vuli* harvest, the government has increased distribution of inputs in preparation of the *masika* season in the bi-modal areas. In the flood affected areas of Angola, Botswana, Namibia, and Zambia, governments and the humanitarian communities are responding to the emergency needs of affected households through provision of food, water, and temporary accommodation in government buildings.

Table 1 shows cereal pipeline data for the period April to July 2009 in several southern Africa countries where WFP's Protracted Relief and Rehabilitation Operations (PRROs), through which emergency needs are catered, are being implemented. Available data shows that in Zimbabwe, the cereal requirements will be fully met during this period. The improvement in food aid availability is a result of the generous donor contributions, WFP borrowing of 17,000 MT of cereals from C-SAFE (a parallel pipeline program), and savings from reduction of monthly food rations from 10 kg per person to 5 kg per person. For the March distributions, WFP kept the February 2009 monthly cereal ration of 5 kg per person (but maintained it at 10 kg in 10 of the most vulnerable districts). However, because the pipeline is currently well resourced, WFP will increase the April ration in the most vulnerable districts. For the other countries running PRROs, available data indicates that cereal supply shortfalls will be experienced in Lesotho, Zambia, and Swaziland. For Swaziland the projected increased needs from November 2008 to April 2009 have not been matched with increased arrivals; consequently, pipeline breaks for cereals have occurred since February 2009. Since February 2009, rations have been reduced to stretch the available food as far as possible, a factor which has affected the coping capacities of beneficiary households in the months prior to the May harvest.

Table 1. Cereal Pipeline Requirements April 2009 – July 2009. WFP Southern Africa PRRO (MT)

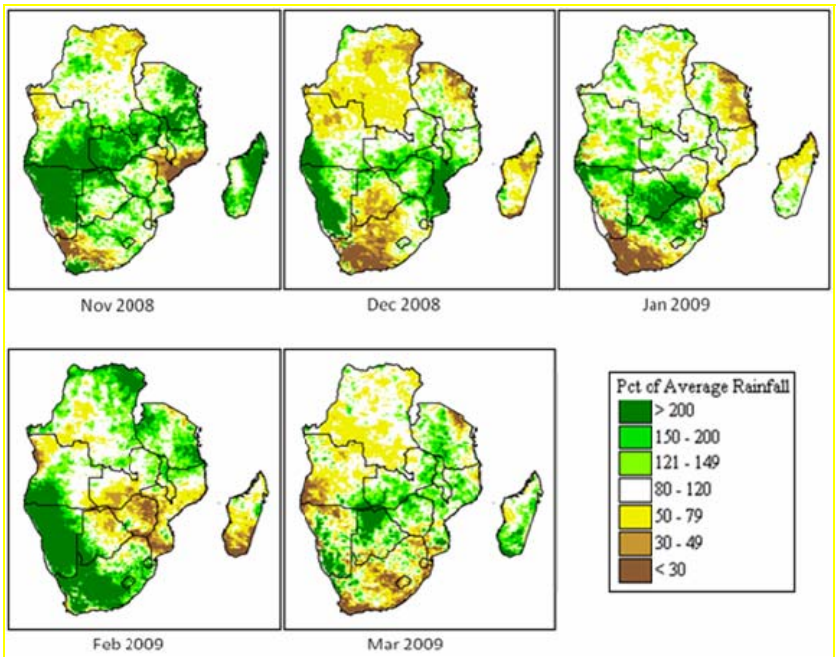
	April - July 2009		
	Requirements	**In Pipeline**	**Shortfall**
Lesotho	3,096	3,039	-57
Malawi	10,200	11,651	1,451
Mozambique	1,274	1,392	118
Madagascar	534	2,395	1,861
Swaziland	2,837	1,302	-1573
Zambia	2,922	0	-2,922
Zimbabwe	26,640	47,804	21,164
TOTAL	47,541	57,583	20,042

Source: World Food Programme (OMJ)

Seasonal progress

Performance of the rainfall season throughout the region has been largely satisfactory for crop development and pasture in most areas, although some areas received excessive rains that led to flooding, while others received inadequate rainfall that led to moisture stress and wilting. Overall, regional crop production prospects remain favorable.

Figure 1. Rainfall for November 2008 to March 2009 as a percent of average



Source: NOAA RFE

Seasonal progress: November – February 2009

As depicted in figure 1, November had good rains across most parts of the region, with above-normal rains being received in most areas. However, poor rains were received in central Mozambique, leading to a late start of season in that area. December saw above-normal rains being received in most parts of Mozambique (ending the delay in the start of rains there), Zambia, and Zimbabwe. A dry spell started in northern Tanzania in December in the bimodal areas and continued through to January, and this effectively resulted in the failure of the first cropping season in these bimodal areas. December also saw below-normal rains in Botswana and much of South Africa. This was however ameliorated by the good rainfall distribution that occurred in these

two countries in January and February. February saw a dry spell in parts of southern Malawi, central and southern Mozambique, southern Zambia, and north-eastern Zimbabwe, which caused varying impacts from crop moisture stress to permanent wilting in the different areas. The worst affected areas were north-western Zimbabwe, parts of central Mozambique, and parts of southern Malawi, where reports of permanent wilting and severe water stress were received. In February, there was also extensive flooding that occurred in southern Angola and northern Namibia over the Cuvelai Basin, with loss of lives, and destruction of infrastructure, crops, and livestock from the flooding.

Seasonal progress: March 2009

In March, moderate to heavy rains were received in the central parts of the region covering Zambia, northern Zimbabwe, northern Malawi, south-western Tanzania, northern Botswana, central and northern parts of South Africa, and central Mozambique. Although these rains brought relief to moisture stressed crops that had been affected by the dry spells in February, they also led to flooding and washed away cropped areas in many low lying areas along major river basins. In some parts of Malawi, the rains relieved moisture stress in crops but also caused water-logging, flash floods, and loss of crops. In central and southern Malawi, where the maize crop had reached maturity and drying stages and was generally in good condition, the wet weather hampered harvesting and drying. The mid-season dry spells are likely to have caused significant crop failure in parts of Nsanje District in southern Malawi. But despite these setbacks, prospects for yet another good harvest in Malawi remain favorable.

In Zambia, heavy rains in the western parts of the country led to extensive flooding, damaging infrastructure and inundating residential and cropped areas. These rains resulted in some crop loss in localized low lying areas, but also triggered early harvesting to salvage already mature (but not dry) crops in flooded fields. There are serious concerns of possible fungal attack on the maize due to excessive moisture this late in the season. The northern parts of Botswana experienced extensive flooding following heavy rains in Angola and Namibia resulting in unusually high river flows into the Kavango and Chobe rivers. Botswana national disaster management authorities are monitoring developments in the Okavango area in the north. Reduction in rainfall activity in upstream areas will be needed to contain flooding in the northern parts of Botswana. To this end, the SADC Drought Monitoring Centre has predicted a tapering off of rainfall amounts as the rainfall season terminates in most SADC countries in the April to June 2009 period.

Rainfall activity declined in Angola, north-eastern Namibia, and eastern parts of the Democratic Republic of the Congo, bringing relief from the floods that were experienced in some of these areas. In Namibia, the floods in the Cuvelai Basin were reported to be receding following reduced rains upstream. Similarly, in Angola, reduced rains in southern parts of the country, including the Cuvelai Basin, facilitated the recession of the floods that had displaced thousands of people in the southern parts of the country. However, contingency measures in case of additional flooding need to be put in as the rainfall season is still active in many areas of the country.

The moderate to heavy rains received in the northern parts of Zimbabwe improved soil moisture content resulting in recovery of moisture stressed crops. Maize crop condition in most parts ranges from fair to good. Some of the late planted maize crop is still at vegetative stages in areas where agriculture inputs were acquired late. Vegetation conditions are good, with plenty of browse for livestock.

On the other hand, Swaziland and southern parts of Mozambique and Lesotho were generally dry during March. In Lesotho, the dry weather that prevailed in most areas of the country is not likely to negatively impact on the crop as the maize crop had reached the grain filling stages. Reports indicate that crop conditions ranged from fair to good. The late planted crops, which are not yet fully matured, are facing the threat of frost, which is expected anytime from now. Dry weather in southern Mozambique impacted negatively on potential crop yields in Gaza and Maputo provinces. However, crops in the northern parts of Mozambique are reportedly doing relatively well.

In Tanzania, the western areas, the south-western highlands and west of Lake Victoria Basin received above normal rainfall. However, the southern coast, central parts, northern coast, north-eastern highlands, and Lake Victoria Basin received below normal rains. The maize crop stages in the unimodal areas range between tasselling to maturity, while the late planted crops were still at vegetative stages. Crop condition ranges from fair to good except in some central areas (Dodoma Region), where dry spells have led to moisture stress. In the bi-modal rainfall areas, the anticipated *masika* season rains

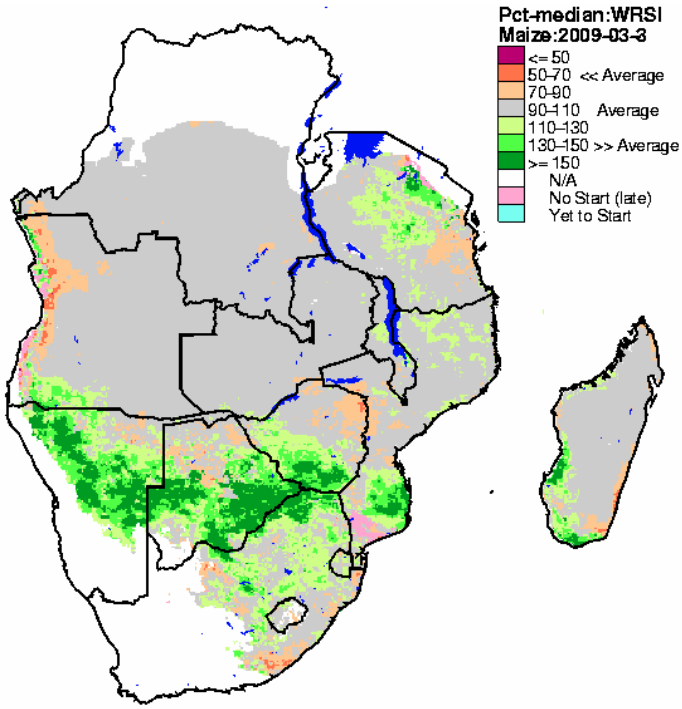
have been delayed as they should have started in March. This has forced some farmers to opt for dry seeding, which is often associated with reduced germination rates.

The International Red Locust Control Organization for Central and Southern Africa has reported the existence of numerous and dense red locust populations in the Iku-Katavi and Lake Rukwa plains of Tanzania. If not controlled, they are likely to move from the breeding areas, and invade neighboring farming areas, where they could destroy crops. The swarms could potentially spread further into Uganda, Kenya, Republic of Congo, Rwanda, and Burundi, where they would pose a similar threat to crops and food security. Meanwhile, in Zambia, locusts and grasshoppers had invaded maize growing areas in Kazungula District in Southern Province, infesting an estimated 40,000 ha of crop land, damaging from 10-30 percent of the crop. The situation has been brought under control.

Analysis of the water requirement satisfaction index (Figure 2) indicates that many areas (green colors) in the southern half of the region have a potential to attain above average yields. Potential yield reductions (yellow and orange colors) due to poor rainfall distribution are projected for north-eastern Zimbabwe, parts of central Mozambique, parts of southern Malawi, and parts of western Tanzania. Elsewhere, the prediction is for a near normal yield (grey colors). Production estimates for the 2008/09 harvests indicate that South Africa will produce 11.71 million tons of maize, representing an 11 percent drop from last year's harvest of 13.16 million MT, but is still more than 20 percent above the past 5-year average of 9.72 million MT. Elsewhere, the crop estimate figures and projections are expected earliest at the end of April 2009.

The fear of an early cessation of the rainfall season has been allayed as moderate to heavy rains were received throughout the region in March, and the season is coming to a timely end in most areas. The decline in rainfall activity will allow for drying of crops in most areas in preparation for the harvest. However, in areas where the season started late, or planting was delayed (central Mozambique and parts of Zimbabwe), the continuation of rains into mid-April is required to allow the late crops to mature. Although the outlook for the April to June period is for normal to above-normal rains, rainfall amounts will be tapering off as the season terminates in most SADC countries.

Figure 2. Water Requirements Satisfaction Index Dekad 3 Mar 2009



Source: USGS/FEWSNET

Markets, trade, and food access

Trade progress

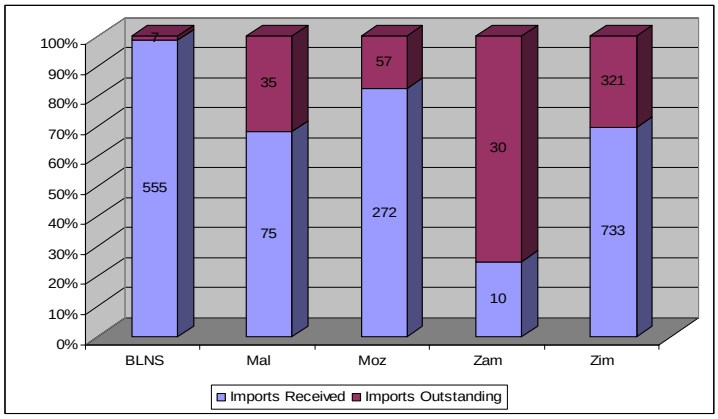
The updated regional cereal supply/demand position indicates that for the 2008/09 marketing year, there were adequate supplies of maize to meet regional demand. This was due largely to the excellent maize harvest in South Africa. However substantial deficits had been projected for the other three main cereal crops, which, though not produced in large volumes, are widely consumed throughout the region. Table 2 also shows that most countries did make adequate import plans at the start of the marketing year to cover projected shortfalls in maize, wheat, and rice. The region's import demand usually peaks during the hunger season – beginning in November and extending until March/April when seasonal crops (and early maize harvests) become available. Monitoring efforts reveal that in some countries where maize shortages were critical this year, despite the adequacy of import plans, the actual deliveries did not match demand. Table 2 and figure 3 show that by the end of March, which marks the end of the marketing year for most SADC countries, significant amounts of planned imports still remained outstanding.

Table 2. SADC cereal imports and exports progress ('000 MT)Balance sheets updated end March 2009

	Maize	Wheat	Rice	Sorghum /Millet	TOTAL Cereals
Deficit/Surplus	1,213	-2,260	-1,085	-314	-2,446
Planned Imports	2,432	3,066	1,518	11	7,028
Planned exports	2,514	233	27	28	2,801
Uncovered Gap/Surplus	**1,131**	**573**	**407**	**-331**	**1,781**
Imports Received	1,745	1,742	353	10	3,850
Exports shipped	2,195	160	26	0	2,380
Import Prog (%)	**72**	**57**	**23**	**87**	**55**
Export Prog (%)	**87**	**69**	**96**	**0**	**85**

Excludes DRC and Madagascar. Source: SADC National Early Warning Units, South Africa Grain Information Service and FAO/GIEWS

Figure 3. Maize imports (commercial and food aid) progress in selected countries (percent complete and '000 MT). Balance sheets updated end March 2009



BLNS: Botswana, Lesotho, Namibia and Swaziland. Source: National Early Warning Units, South Africa Grain Information Service and FAO/GIEWS

The figures used in this analysis include commercial, food aid, and some informal imports received. Accordingly, only 72 percent of planned maize imports (commercial and food aid) in the SADC region have been met, while 87 percent of planned exports were shipped. The available data suggests that at the regional level, most of the shortfalls (especially maize) indicated at the start of the marketing year were covered. Despite this, millions of people in various parts of the region (including Malawi and Zambia) did experience food supply shortages, some of which were quite severe, over the course of the 2008/09 consumption period.

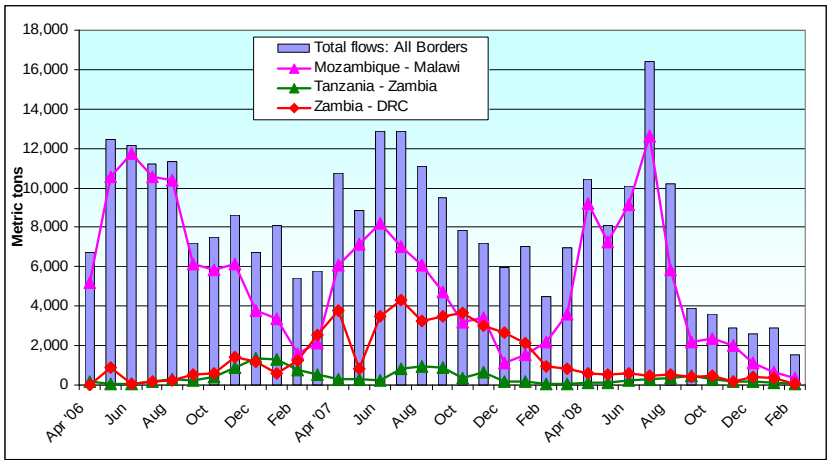
In Zimbabwe, which was facing the most critical levels of maize shortages, available data shows that 70 percent of total formal maize imports were received out of the planned 1,054,000 MT (792,000 MT commercial and 262,000 MT food aid). However, given marked increases in formal and informal private sector imports (for which no records are available), it is likely that the outstanding gap is significantly lower. To a lesser extent, the same is true of outstanding gaps in other countries because available trade data is only partially complete. Furthermore, official data (commercial and food aid) arrives after considerable time lags, while informally traded volumes are difficult to monitor and estimate.

Trade volumes

Table 3 provides a summary of intra-regional trade – mainly formal exports by South Africa and informal import/export flows among SADC countries. By the end of March, South Africa had shipped more than what had initially been estimated as likely exports over the 2008/09 marketing year. A total of 1.94 million MT were shipped against the planned shipments of 1.86 million MT. This comprised of 1.37 million MT shipped to the region, and an additional 568,963 MT to countries in West and East Africa, and as far afield as Iran, Yemen, and Malaysia. Nonetheless, despite this large volume of exports, the

country is still expecting a large carryover stock of about 2 million MT at the start of the 2009/10 marketing year in May 2009.

Figure 4. Volume of informal cross-border trade in maize between DRC, Malawi, Mozambique, Tanzania, and Zambia: Apr 2006 – Feb 2009



Southern Africa Informal Cross Border Monitoring System – Feb 2009

Informal trade in staple foods (mainly maize) in monitored countries remained significant throughout this consumption period, underlining the importance of cross border food trade in meeting the supply and demand needs of communities along border areas. However due to tighter supplies coupled with high staple food prices and export bans in the traditional source areas, lower volumes of imports (about 73,000 MT) have been captured this year compared to last year when a total of 113,000 MT of maize inflows were recorded between April 2007 and March 2008. Trade flows, which last year were averaging 6,500 MT per month in the period November to March, have hovered around 2,000 – 3,000 MT over the same period this year (figure 4). The most significant reductions have been in the exports from northern Mozambique into southern Malawi. Nonetheless, informal maize inflows into Malawi remain the most significant making up about 84 percent of the total recorded. Mozambique and Tanzania remain the largest sources of informally traded maize, though the export ban in Tanzania has constrained what could otherwise been more vibrant trade between that country and neighboring Malawi and Zambia. By the end of February, Mozambique had informally exported some 54,000 MT of maize, while Tanzania had exported close to 111,000 MT mostly to Kenya. Zambia (where maize stocks are reported in short supply) has informally exported some 10,370 MT, mostly to the DRC, Malawi, and Zimbabwe. This represents a 71 percent reduction of the country's informal exports volumes (some 36,000 MT) last season.

Table 3. Intra-regional maize imports by SADC member states, April 2008 to March 2009 (MT)

	Ang	Bot	DRC	Les	Moz	Mal	Mau	Nam	Swa	Tan	Zam	Zim
SA White Maize	2,020	270,865	906	97,168	264,229	7,950	12,400	118,001	17,390	45,357	3,434	517,466
SA Yellow Maize	648	1,162	0	4,742	22,481	0	0	18,555	39,660	0	0	2,750
Informal Cross Border	-	-	4,267	-	249	60,829	-	-	-	460	3,589	3,133
Total	2,668	272,027	5,173	101,910	286,959	68,779	12,400	136,556	57,050	45,817	7,023	523,349

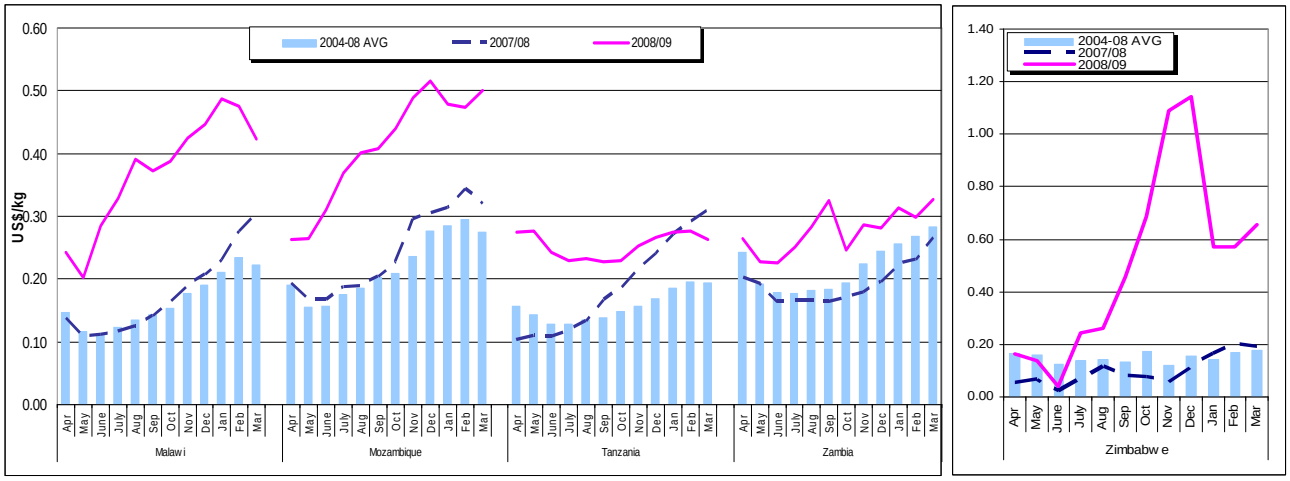
Source: South African Grain Information Service (SAGIS) – Mar 27, 2009 and Southern Africa Informal Cross Border Monitoring System – Feb 2009 *
*Informal trade volumes only include trade observed volumes "captured" by the border monitors. Trade volumes are significantly underestimated in Zimbabwe because of stringent trade regulations and tight border controls.

Nominal retail prices of maize on regional local markets

Price data collected from the monitored local markets in selected countries in the region shows that although nominal prices of staple foods remain high and well above last year's levels and the past 4-year average, the steep rises that have occurred consistently until December have abated (figure 5). For a comparative analysis, prices in local currencies for the selected markets have been converted to the USD equivalency, using prevailing average monthly exchange rates. Following an indication of relatively stabilizing prices in February, prices in the monitored markets of Mozambique (Nampula and Maputo), Malawi (Chitipa), Zambia (Choma and Lusaka Rural), and Zimbabwe (Mutare) increased markedly in March, with average increases of 5 percent in Mozambique, 10 percent in Zambia, 3 percent in Chitipa market, Malawi, and 15 percent in Mutare market, Zimbabwe. These increases are quite unseasonable for most markets, as March marks the end of the hunger season when hitherto scarce cereal commodities are augmented with seasonal crops such as pumpkins and other squashes, leafy greens, and fresh cassava. It is likely indicative of continuing pressure on supplies of food as the green harvest is delayed in some areas, and as food aid distributions to needy populations are prematurely curtailed due to under

resourced pipelines. Significant drops (on average 15 percent) were registered in two of the three monitored markets in Malawi (Mchinji and Nsanje), and the two monitored markets of Tanzania (Dar-es-salaam and Mbeya) where prices dropped on average about 5 percent. The drops in these markets are attributed to significant improvements in local market supplies, with traders in Malawi reported to be offloading significant stocks onto the markets as the new harvests begin to come in.

Figure 5. Retail prices of white maize at selected markets – April 2004 – March 2009 (US$ per kg)



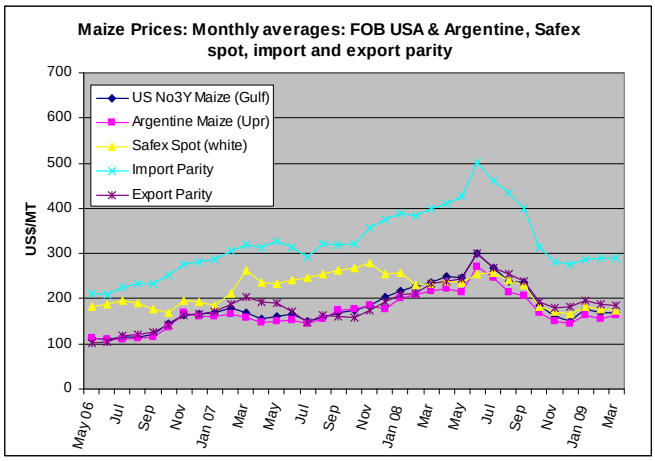
Based on average prices (in USD Equiv) on key markets in each country. Source: FEWS NET Malawi, Mozambique, Tanzania, Zambia, and Zimbabwe

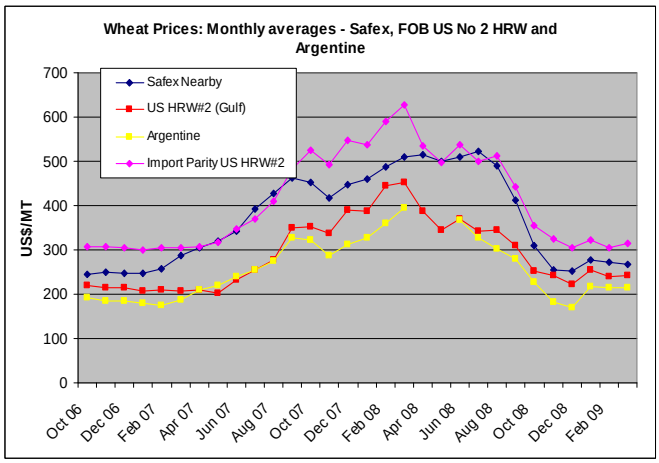
Maize and wheat prices on the South African Futures Exchange

White maize average spot price for white maize on the South African Futures Exchange (SAFEX) continued on the downward trend noted since December 2008, dropping another 2 percentage points from ZAR 1,719/MT in February to ZAR 1,691/MT in March. This trend is in line with falling (and stabilizing) international prices and domestic supply estimates, which continue to point at another good season for maize production in the country. The SAFEX spot prices (in US dollar equivalent) however, remain above international levels with the US maize No 3 yellow (Gulf) averaging USD 169/MT in March, and the Argentine (Upriver) at USD 163/MT. The South African prices on the other hand averaged at USD 171/MT. White maize on SAFEX has been priced above international levels since October 2008, when international commodity prices started dropping significantly. The South Africa Rand had depreciated significantly against the US Dollar, falling from about ZAR 8 to ZAR 10/USD 1 in October 2008. Since November, it has hovered around ZAR 10/USD 1. The average monthly SAFEX spot price has remained below export parity since the marketing season began in May – indicating greater competitiveness of local prices, whereby farmers can find better prices selling locally than they can on international markets.

A trend analysis of wheat prices (USD equivalent) indicates that wheat prices have fallen 9 percent over the last wheat marketing season (October 2007 and September 2008), but dropping a steeper 14 percent in the period since the current season began in October (figure 6). As with maize, wheat prices on SAFEX had been dropping consistently in recent months until January, when a 10 percent increase was recorded over the December 2008 price. While the February average had remained almost unchanged at USD 276/MT (compared to USD 277/MT in January), the March average dropped to USD 267/MT. The increase in January was in response to marked increases in international wheat prices as markets reacted to estimates of reduced global cereal supplies in 2009.

Figure 6. FOB USA and Argentine maize and wheat prices compared to SAFEX spot (USD/MT)

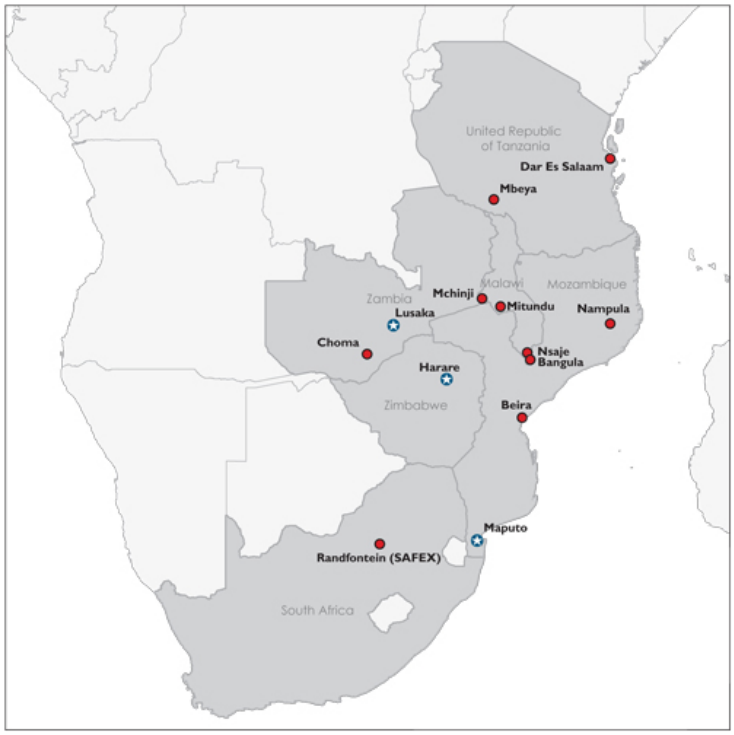




Data source: SAFEX

The Southern Africa Food Security Brief draws from the FEWS NET monthly food security reports, with additional contributions from network partners including FEWS NET/USGS, the SADC Regional Remote Sensing Unit, SADC Regional Early Warning Program – Gaborone and the SADC Regional Vulnerability Assessment Committee comprised of SADC FANR, FAO, WFP, FEWS NET, SC (UK), and OCHA. Additional information is drawn from the national early warning units and meteorology services in SADC member states.

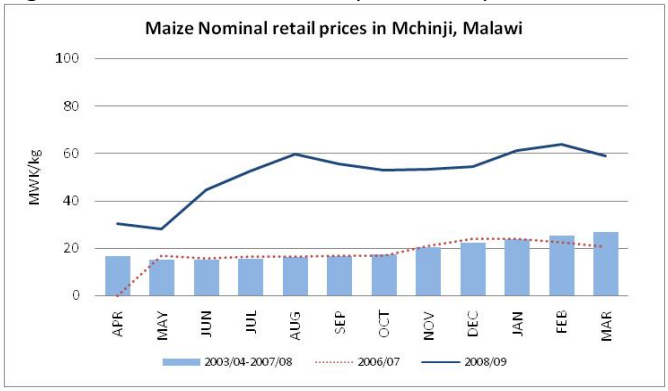
ANNEX: Southern Africa Monthly Price Bulletin March 2009

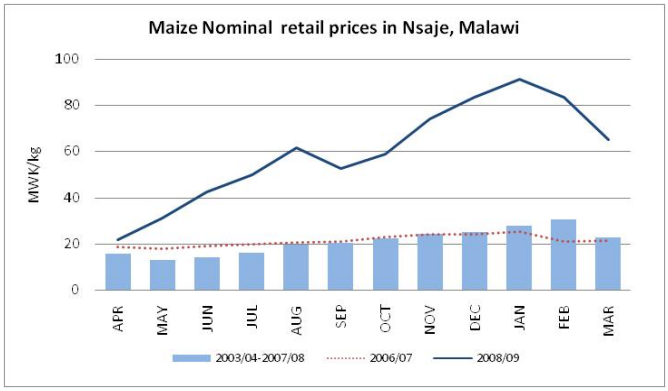


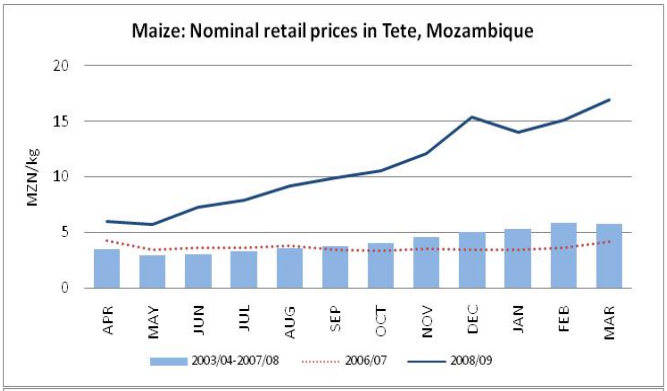
Monthly prices are supplied by FEWS NET enumerators, local government agencies, market information systems, UN agencies, NGOs, and other network and private sector partners.

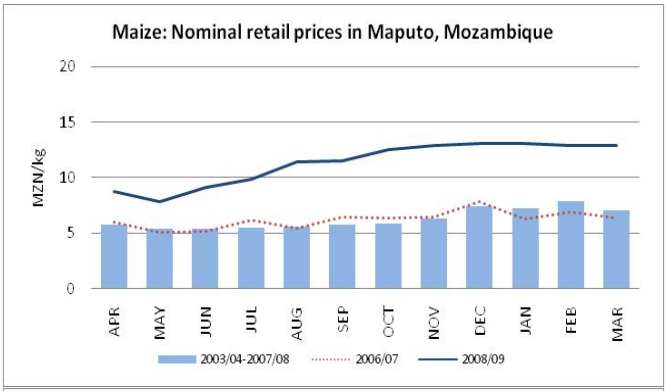
Most households in Southern Africa depend on maize as their main source of food and energy, given the high volumes and ease with which it is produced. Alternative food crops that are consumed as substitutes include rice, wheat, sorghum, millet, and tubers such as cassava and potatoes. Consumption of these substitutes occurs mainly when maize is not available or among those households in areas where such substitutes are more easily available (for example, cassava in northern Mozambique). The majority of rural households do grow the other cereals — especially sorghum and millet, which are more drought resilient — in relatively small quantities as a buffer in bad production years for maize. Furthermore, wealthier households (especially in urban areas) with access to a variety of costlier cereals (such as rice and wheat) do consume them to diversify their diets. While wheat is widely consumed in the form of bread, it is produced in relatively small quantities in the region. South Africa is the only country that produces substantial amounts, but still in quantities insufficient to meet domestic requirements. South Africa is also the region's major producer of maize and acts as a major supplier and exporter. In years of relative maize surplus, sizable amounts of both formal and informal cross border trade occurs between neighboring countries.

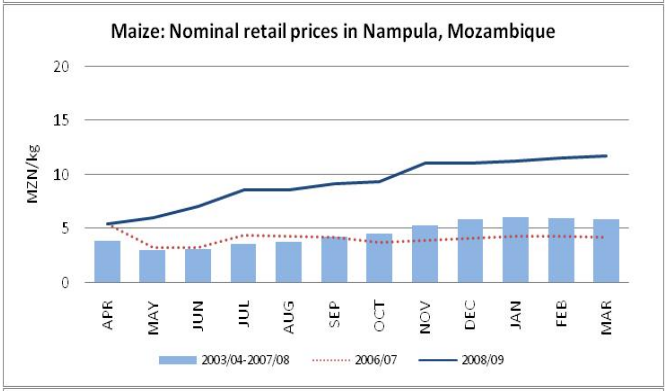
MAIZE: The markets below represent the major markets — both production and consumption— within each country in the region in addition to the SAFEX spot market prices in South Africa.

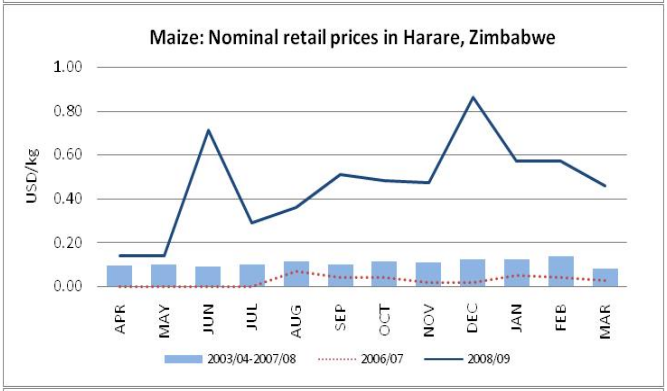


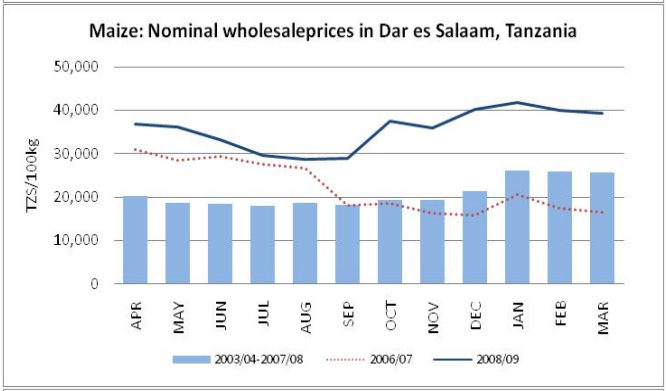


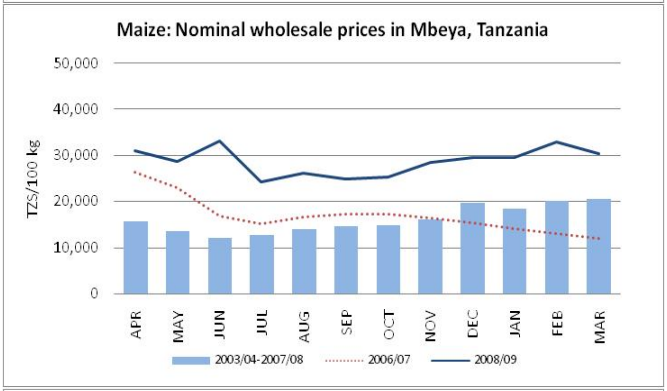

Maize: Nominal retail prices in Tete, Mozambique
MZN/kg
20
15
10
5
0
APR MAY JUN JUL AUG SEP OCT NOV DEC JAN FEB MAR
2003/04-2007/08
2006/07
2008/09

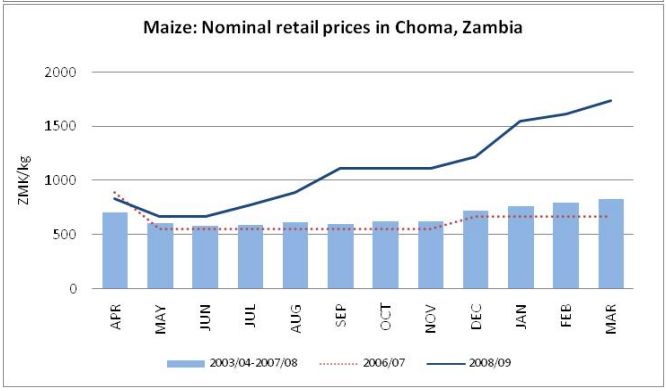

Maize: Nominal retail prices in Maputo, Mozambique
MZN/kg
20
15
10
5
0
APR MAY JUN JUL AUG SEP OCT NOV DEC JAN FEB MAR
2003/04-2007/08
2006/07
2008/09

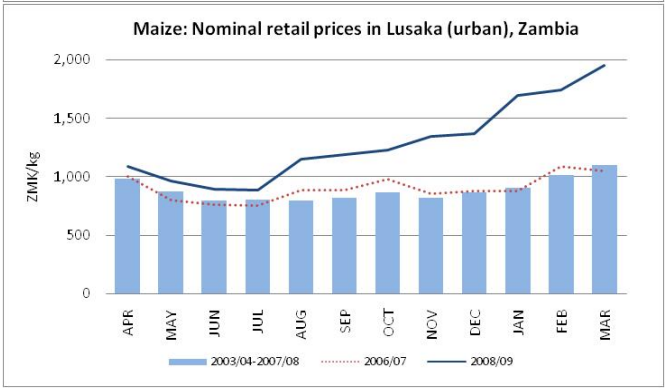

Maize: Nominal retail prices in Nampula, Mozambique
MZN/kg
20
15
10
5
0
APR MAY JUN JUL AUG SEP OCT NOV DEC JAN FEB MAR
2003/04-2007/08
2006/07
2008/09

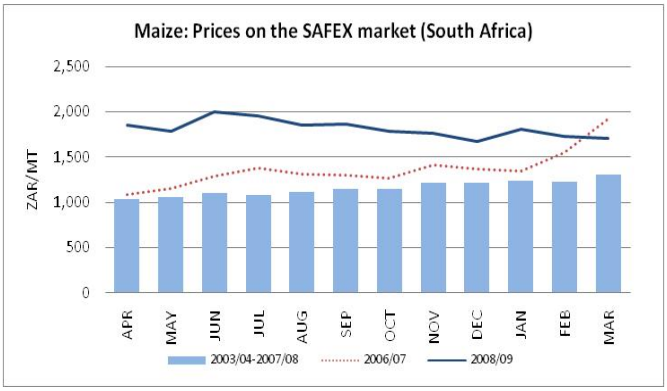

Maize: Nominal retail prices in Harare, Zimbabwe
USD/kg
1.00
0.80
0.60
0.40
0.20
0.00
APR MAY JUN JUL AUG SEP OCT NOV DEC JAN FEB MAR
2003/04-2007/08
2006/07
2008/09


Maize: Nominal wholesaleprices in Dar es Salaam, Tanzania
TZS/100kg
50,000
40,000
30,000
20,000
10,000
0
APR MAY JUN JUL AUG SEP OCT NOV DEC JAN FEB MAR
2003/04-2007/08
2006/07
2008/09

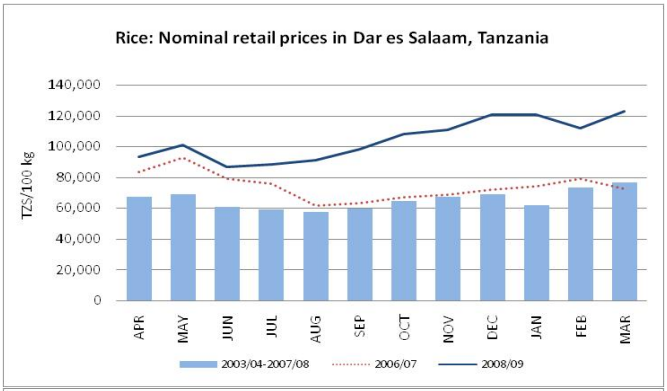

Maize: Nominal wholesale prices in Mbeya, Tanzania
TZS/100 kg
50,000
40,000
30,000
20,000
10,000
0
APR MAY JUN JUL AUG SEP OCT NOV DEC JAN FEB MAR
2003/04-2007/08
2006/07
2008/09

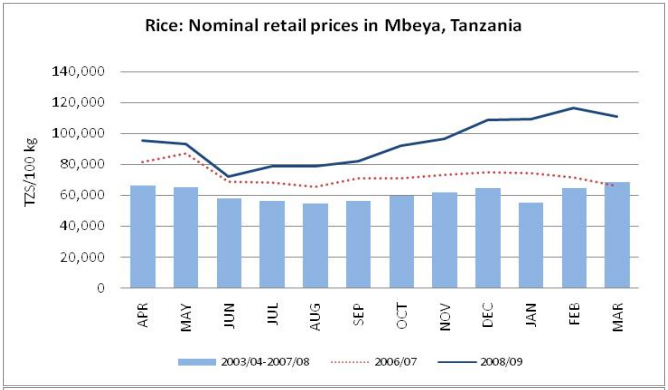

Maize: Nominal retail prices in Choma, Zambia
ZMK/kg
2000
1500
1000
500
0
APR MAY JUN JUL AUG SEP OCT NOV DEC JAN FEB MAR
2003/04-2007/08
2006/07
2008/09

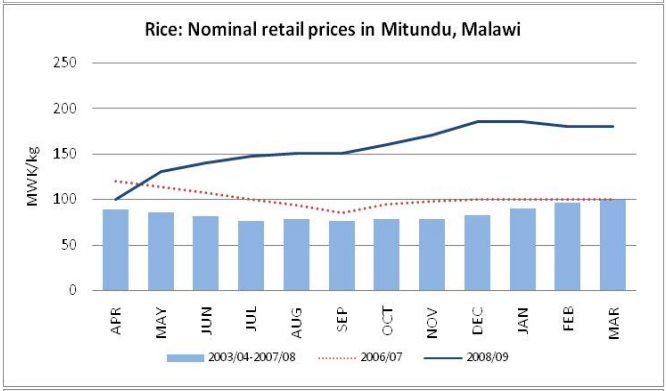

Maize: Nominal retail prices in Lusaka (urban), Zambia
ZMK/kg
2,000
1,500
1,000
500
0
APR MAY JUN JUL AUG SEP OCT NOV DEC JAN FEB MAR
2003/04-2007/08
2006/07
2008/09

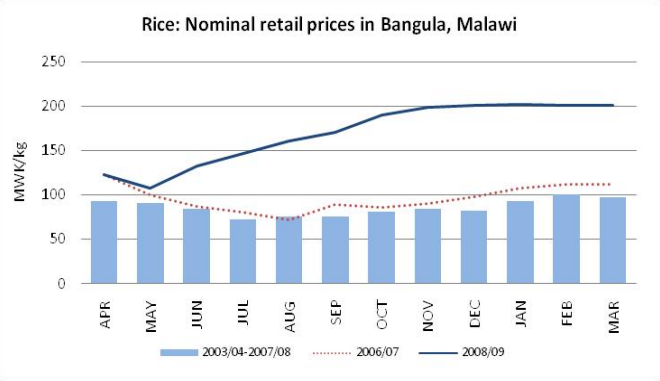


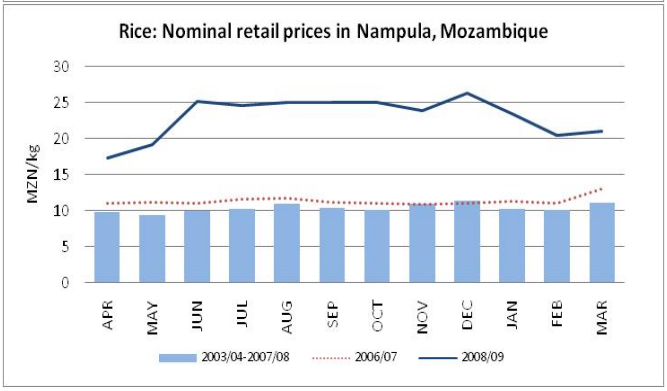
RICE: The markets below represent major production and consumption markets within selected countries in the region.

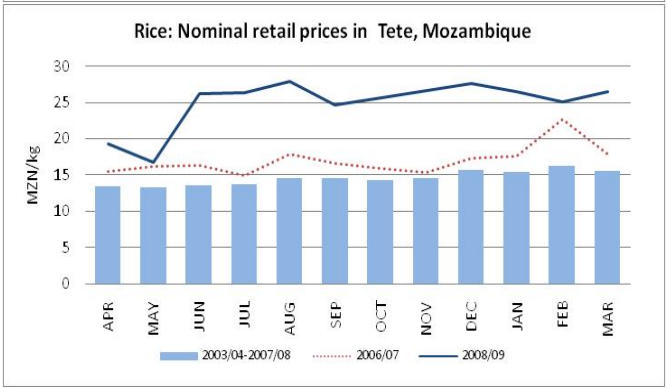


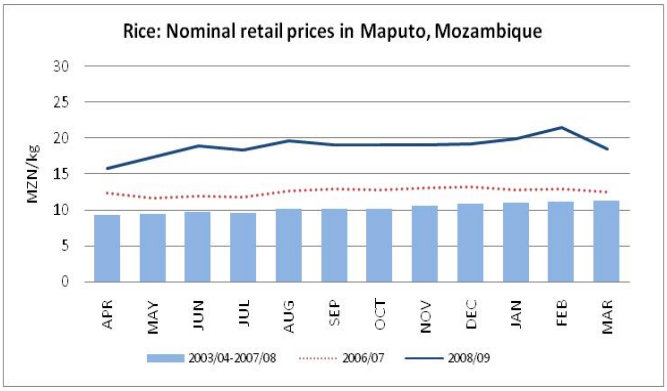












WHEAT GRAIN: Wheat prices in South Africa indicate trends in domestic, regional, and international wheat prices. The spot prices for wheat grain on the South Africa Futures Exchange (SAFEX) are indicative of prices that neighboring countries face as they import these commodities. These prices are comparable with those faced by neighboring countries such as Lesotho, Namibia, Botswana and Swaziland.