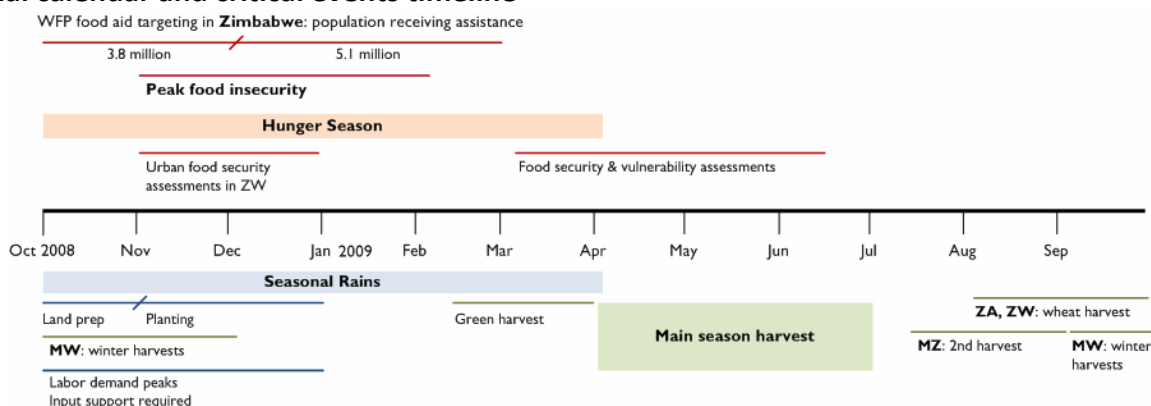


SOUTHERN AFRICA Food Security Outlook

April to September 2009

- Staple food harvest prospects for the 2009/10 consumption year vary across the region, depending on rainfall performance and other crop growing conditions and the overall impacts of various shocks on national crop production. Overall, regional cereal production is expected to decline slightly from last season's above-average production due in part to decreases in South Africa's total maize production, as well as expected decreases in national harvests from the other maize producing countries.
- Despite an estimated 10 percent decrease in production compared to last year, South Africa is expecting another strong harvest, with current estimates placing the total harvest of white and yellow maize at 11.72 million MT. This year's harvest, plus over two million MT of carryover stocks, is expected to yield an exportable surplus of over three million MT. This exportable surplus is sufficient to meet the region's import requirements, most of which originate from grain deficit Botswana, Lesotho, Namibia, Swaziland (BLNS), and Zimbabwe.
- Although harvest prospects in Malawi, Tanzania, Mozambique, and Zambia were somewhat compromised by various weather shocks, expectations are still for average to above-average harvests nationally in each of these countries. However, pockets of localized food shortages are expected in areas directly affected by weather shocks. Consequently, although national maize production in these countries is expected to cover domestic consumption requirements, it is anticipated that they will need to import some grain (especially as food aid) to cover the needs of populations whose harvests were significantly reduced and who are unable to purchase grains from local markets. Ongoing food security and vulnerability assessments, which should be completed by June/July, will inform decisions on humanitarian interventions and strategies to respond to chronically food insecure populations.
- In Zimbabwe, where cereal production has been decreasing for the past five years, this year's harvest is anticipated to be an improvement over last year's record low production, despite the negative impacts of weather shocks, input shortages, and deteriorating agricultural infrastructure. While this year's production shows some improvement, recent assessments by the Zimbabwe Vulnerability Assessment Committee indicate a large number of households will experience food shortages and will require humanitarian assistance, some as early as June 2009.
- Nominal food prices at most local markets are decreasing, reflecting improved household and market supplies of maize and other foods (Annex 1). The downward trend is expected to continue until the end of the harvest (July/August), when prices should stabilize before rising again as the hunger season (October-February) approaches. Despite current decreases in prices, they remain above normal for this time of the year, threatening the food security of market-dependent households in urban and rural areas where rains fared poorly this season.

Seasonal calendar and critical events timeline



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Current food security conditions

FEWS NET, SADC, and the National Early Warning Unit reports indicate a general improvement in food security across most of the region, coinciding with the end of the hunger season (March/April). Food availability is increasing as seasonal crops, including green maize and early maize harvests, make their way to households and onto rural markets. Food security is particularly favorable in those areas where production benefited from normal to above-normal rainfall this growing season.

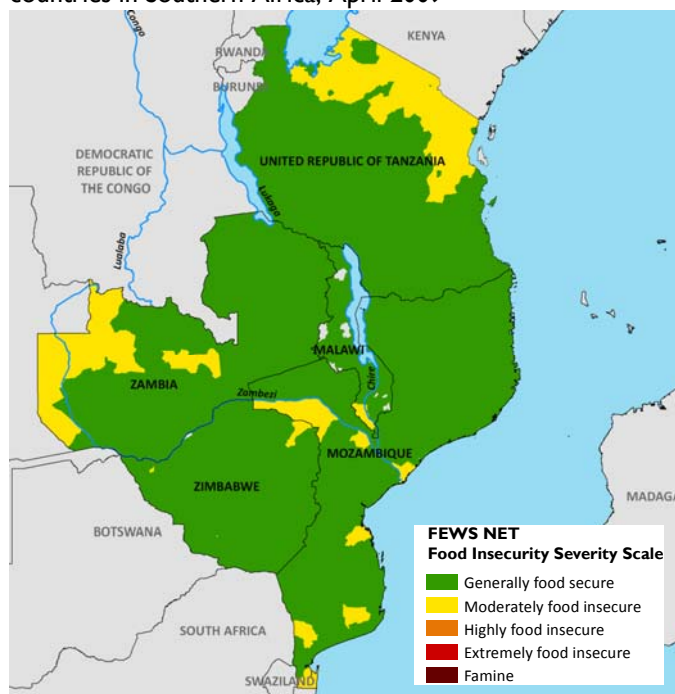
Apart from South Africa, countries anticipating average to above-average harvests include Malawi, Mozambique, Tanzania, and Zambia. These harvests resulted despite excessive rains and floods, mid-season dry spells, and input shortages in some areas, reducing what could have been a bumper harvest. Although official crop estimates have not yet been released in these countries, field reports support these projections. South Africa is expecting another bumper harvest this year, due mainly to favorable growing conditions in the main maize growing areas of the country. The latest production forecast (as of 23 April) estimates a South African maize crop of 11.72 million MT, a 10 percent decrease from last season, but still 20 percent above the five-year average of 9.72 million MT.

Preliminary field reports suggest that food production for BLNS might improve slightly compared to last year, especially in areas outside parts of northern Namibia and Botswana that were affected by severe flooding. Consequently, food security should improve in these countries, especially in the period immediately following the harvest. Thereafter, conditions are likely to be stable until the start of the hunger season, when most households will have depleted their own production. Prevailing high food prices, especially for maize, wheat, and rice – which BLNS have to import – could limit household access to adequate food supplies, resulting in moderate food insecurity following this outlook period. However, with the above-average harvest expected in South Africa, food prices may continue to decline and stabilize, assuming South African prices continue to do the same (Annex 1). However, as SAFEX prices closely track international prices, the situation needs close monitoring, as maize prices may spike if global prices begin to rise.

Production prospects in Zimbabwe are expected to be considerably better than last season's record low production levels. However, several factors prevented this year's production from reaching its full potential, including in various parts of the country: delayed onset of rains, input shortages, excessive rains, and a mid-season dry spell. Consequently, any improvements in the country's food security following the harvest will be short-lived, and many areas will face food shortages by the end of June. Significant commercial and humanitarian food imports will likely be required during at least half of the 2009/10 consumption period to mitigate food insecurity. Economic instability is also expected to continue over the 2009/10 consumption year, causing many households to continue to struggle to access food and other basics, particularly in urban and rural deficit-production areas.

Although Angola received normal to above-normal rains this season, severe flooding affected parts of the southern provinces, causing crop stands to wash away and water-logging fields and decreasing crop production. These hazards will have a particularly negative impact on household food security in Cunene Province, and are also likely to impact Kuando Kubango and Moxico, where populations face acute food insecurity and increased risks of waterborne diseases. Planned and on-going joint missions by the Government of Angola, UN agencies, and international NGOs such as OXFAM will further assess food security in these areas.

Figure 1. Current food security conditions in FEWS NET countries in Southern Africa, April 2009



Source: FEWS NET

Table I. Early warning for FEWS NET countries

Country	Main Issues
Malawi	Crop production prospects are above normal across Malawi, except in the Lower Shire Valley (Chikwawa and Nsanje districts), where prolonged mid-season dry spells affected an estimated 55,000 households. Cereal harvest in these areas are expected to last a maximum of four months (to July/ August), instead of the normal October/November. The worst-affected households will harvest almost nothing, and some are already reportedly turning to markets to access food. The government has yet to release official crop estimates indicating the extent of projected food supply shortages in affected areas.
Zambia	Moderate food insecurity is expected among 102,469 households in Zambia's flood-affected areas, especially those in the northern and western parts of the country where flood impacts were more severe. The VAC's rapid flood assessment in late March indicated that flooding caused human death and loss of productive assets, reducing access to services such as schools and health centers, and increasing the risk of water borne disease outbreaks. About 33,914 households in nine districts need 1,695 MT of food assistance to supplement available supplies in April and May, though it is likely that additional populations in these areas will face moderate food insecurity and need assistance as early as August. Precise assistance needs will be determined following May assessments.
Zimbabwe	Immediate food assistance is needed for the 10 percent of Zimbabwe's population that is chronically food insecure. Over the outlook period, the percentage of the population in need of food assistance will increase, particularly in those rural areas where a February dry spell led to crop failure and where harvests are expected to last, at most, until June (Mt Darwin, Rushinga, Hwedza, Mudzi, Mutoko, Seke, and Uzumba Maramba Pfungwe). Though overall food production is expected to improve over last year's record low, it remains below average and is insufficient to meet the country's consumption requirements. Estimated production levels indicate sufficient food to meet six months of requirements for about 80 percent of the population, after which humanitarian assistance will be required. Needs are expected to increase after September, when available own-produced food is depleted.
Mozambique	Localized food shortages are expected in parts of southern (northern Maputo and southern Inhambane provinces) and central (southern Sofala, and southern Tete provinces) Mozambique, due to weather shocks and crop pests and diseases. From April-June, poorer households in the worst affected districts (Magude, Panda in the south and Magoe, Changara, Cabora Bassa, Chemba, and Machanga in the center) are expected to remain moderately food insecure. These conditions are likely to extend to other districts within the affected provinces, and will be exacerbated by high food prices due to lack of availability, limiting access for poor and other vulnerable households during and after July.
Tanzania	About 279,607 people are moderately food insecure and require 3,979 MT of food assistance in April and May in 38 districts of Mwanza, Shinyanga, Kilimanjaro, Arusha, Manyara, Tanga, Mara, Singida, Coast, Mtwara, and Lindi regions, due to a failed <i>vuli</i> (Oct-Dec) season in the north, increasing transport costs, and the spread of cassava diseases. 1,917 MT are recommended for free distributions to 106,520 destitute people and 2,061 MT for distribution at subsidized prices to 173,087 vulnerable people who cannot afford to buy food at prevailing market prices. The delayed start of and forecast below-normal <i>Masika</i> (Mar-Jun) rains in some bimodal areas is increasing concerns that food insecurity will deteriorate in the areas where the 2008/09 <i>vuli</i> season failed. Poor <i>Masika</i> rains will impact livestock production and reduce crop production in bimodal highland areas.

Most-likely regional food security scenario

The most likely regional food security scenario between April and September should see a continuation of current generally food secure conditions in most areas, except those areas mentioned above where shocks have compromised food availability, access, and/or utilization. Generally stable food security in the region is projected based on upcoming average to above-average cereal harvests which should be largely sufficient to meet the region's consumption requirements for the next six months and beyond. Most rural households (including the resource poor) will have access to their own food

production until the onset of next hunger season (October/November). Even in structurally grain deficit BLNS countries, May 2009 harvests are expected to meet farming households' consumption requirements over the next six months. Market-dependent households are also expected to be able to access adequate food from local markets, as prices are expected to continue to decline, remaining stable until the beginning of the hunger season. The exception will be among households in areas facing poor production prospects and those that are chronically food insecure. These households are currently assessed to be moderately food insecure, and it is not anticipated that these conditions will deteriorate further over the outlook period, due to expectations of adequate government and humanitarian mitigation measures. Results from the on-going vulnerability assessments throughout the region will provide more concrete findings on overall regional expectations.

The table below and Figures 2 and 3 summarize the most likely scenarios and food security implications for each FEWS NET country in the region during this outlook period.

Figure 2. Most likely food security conditions in FEWS NET countries, April to June 2009

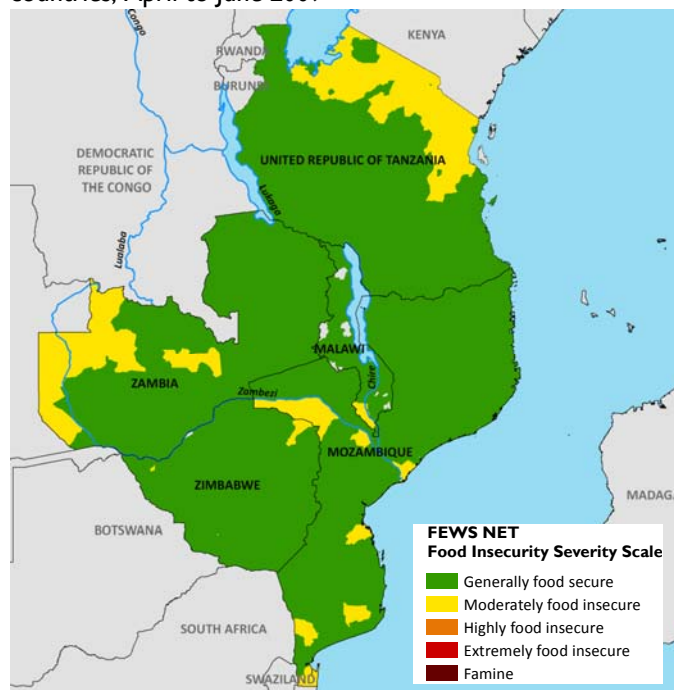
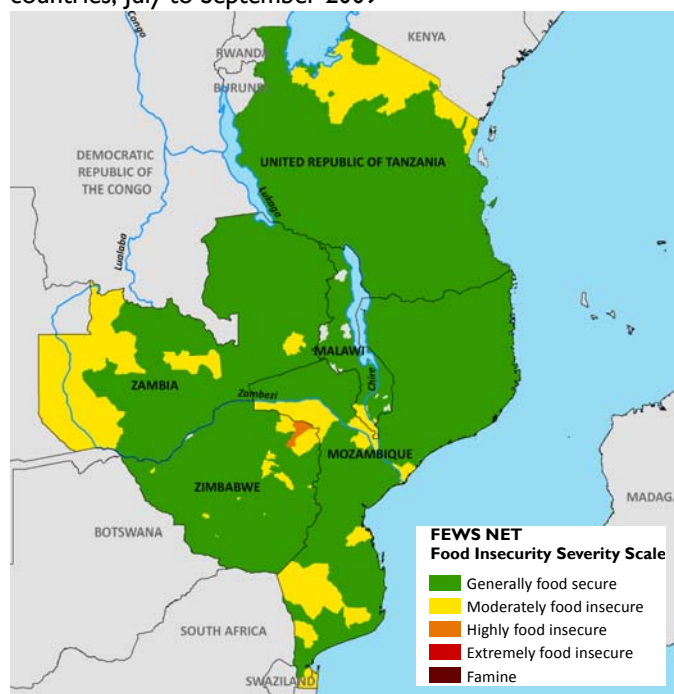


Figure 3. Most likely food security conditions in FEWS NET countries, July to September 2009



Source: FEWS NET

Table 2. Most likely food security scenarios for FEWS NET countries, April-September 2009

Country	Most likely conditions	Food security implications
Malawi	<ul style="list-style-type: none"> Surplus production, with most households in the central and northern regions producing enough to meet consumption requirements. Most households in the Lower Shire harvest very due to prolonged dryness. Cultivable land for winter cropping declines due to a lack of residual moisture. Food prices, especially for maize, may start rising quickly but are unlikely to reach last season's levels, as maize is likely to move into the area from neighboring districts where production was more favorable. ADMARC is also expected to be able to supply local markets in the Lower Shire, given reduced demand from the rest of the country due to satisfactory production levels. Larger inflows of informally traded maize from Mozambique are expected this year, with the easing of private trade restrictions. 	<ul style="list-style-type: none"> Food security remains generally favorable, except in parts of the Lower Shire Valley, where some households will be food insecure for a second consecutive year. The number of vulnerable households will increase rapidly over the outlook period, and will be higher than the number assessed as food insecure last season. Local maize prices are expected to drop from April-June and begin to rise normally from July-September. Prices are likely to be lower than last season due to improved supplies and a reduced number of areas facing unfavorable production conditions.
Tanzania	<ul style="list-style-type: none"> Food supplies in bimodal areas remain low until the <i>Musimu</i> (May) and <i>Masika</i> (July) harvests, keeping prices higher than normal. Increased food supplies from these harvests reduce prices and improve food access for market-dependent households. However, forecast below-normal <i>Masika</i> rains lead to below-average crop production and negatively impact livestock production. Cassava mosaic disease spreads and reduces cassava production, especially in the Lake Victoria Zone. Cassava brown streak persists, threatening Mara and Mwanza regions, where cassava is a main crop. Uncertain cotton markets threaten income for households dependent on cotton sales in Mwanza, Shinyanga, Mara, Tabora, and Kagera. 	<ul style="list-style-type: none"> From April-May, 279,607 moderately food insecure people in the north require 3,979 MT of food assistance. Food security improves in unimodal and bimodal areas immediately following <i>Musimu</i> and <i>Masika</i> crop harvests. Food security in bimodal areas will remain a concern due to below-average <i>Masika</i> rains following a failed <i>Vuli</i> season. Cassava diseases, reduced fishing, and decreased income from cotton sales and livestock could threaten food access.
Mozambique	<ul style="list-style-type: none"> Food production is normal in most of the country, except for a few districts in southern and central regions where weather shocks lead to food shortages. Normal production levels allow for seasonal declines in food prices, bringing relief to poor households reliant on market purchases. Adequate humanitarian assistance by the government and its partners is anticipated for households already experiencing food insecurity, including communities affected by the extended dry spell. 	<ul style="list-style-type: none"> The majority of households are generally food secure during the outlook period. From April-June, poor and very poor households in northern Maputo, northern and southern Sofala, and southern Inhambane and Tete provinces remain moderately food insecure due to the effects of weather shocks and high food prices. From July-September, moderate food insecurity extends to very poor households in other districts in southern and central Mozambique as these households run out of own-produced food. Interventions addressing access to food, water, inputs, and health services are needed

		at the end of the outlook period among households experiencing moderate food insecurity. These interventions are likely to be needed until the March/April 2010 harvest.
Zambia	<ul style="list-style-type: none"> • Harvests are normal to above-normal despite localized flooding (most flooding occurred in relatively low-producing areas). • On-farm food availability and market supplies of food increase during the May-June main harvest period, as maize from small scale farmers arrives on the market. With improving food supplies, staple food prices on local markets drop significantly by June, but remain higher than last year and the five-year average. 	<ul style="list-style-type: none"> • Localized moderate food insecurity is anticipated, especially in flood-affected areas of Eastern and Central provinces and some parts of Western and Northwestern provinces (covering parts of the Zambezi West Bank and Zambezi Flood Plains). The VAC estimates 11,822 households in Western Province and 17,959 in Northwestern Province need immediate food assistance. • It is likely that the assessed population will require assistance for the duration of the outlook period and that additional households in these areas will run out of food by September, due to crop losses. • Additional poor households in areas less severely affected by flooding are also likely to need food assistance as early as August. • Elsewhere, food security conditions will continue to improve between April and September, due to increased market supplies of food from the main harvests.
Zimbabwe	<ul style="list-style-type: none"> • Harvests are expected to be better than last season's but still below normal due to weather shocks, input shortages, etc. • A February dry spell in areas of the northeast reduces harvest prospects in Mt Darwin, Hwedza, Mudzi, Mutoko, Uzumba Maramba Pfungwe, and Seke districts. • Chronic food insecurity due to a struggling economy, high unemployment, low wages and purchasing power, and a lack of safety nets remains over the outlook period. • Good harvests from urban agriculture will augment food supplies in urban centers except for Kariba, Beitbridge, and Victoria Falls, where crop production is limited to small plots. 	<ul style="list-style-type: none"> • Food access is generally adequate through June, though food availability and access will decrease over the outlook period. • Food supplies in dry spell-affected districts cover three-four months of requirements. From July-September, household food security will deteriorate to moderate levels with increased assistance requirements. • Chronically vulnerable populations continue to require food assistance with needs increasing in June and growing as domestic availability dwindles and import needs grow. • Urban food production contributes significantly to urban household food access, leading to stable conditions from April-June, but deterioration from July-September.

Table 3. Events which could affect the April-September food security outlook

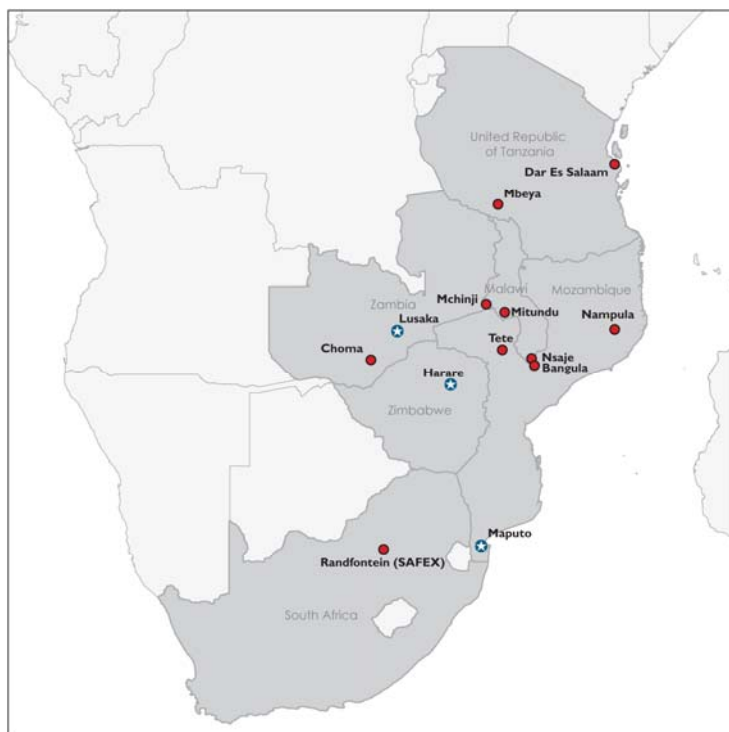
Geographic Focus Area	Possible events that would change the most likely scenario in this area	Impacts on food security conditions	Likelihood of occurrence*	Key variables to monitor
Across the SADC region	Significantly reduced regional cereal harvests compared last year	Reduced food supplies and persistent high food prices	Unlikely	Crop production estimates
Malawi (Lower Shire Livelihood Zone)	Formal lifting of the private maize trade restriction	Increased maize movement into deficit production areas of the Lower Shire, increasing supplies and reducing local market prices.	Likely	Market maize supplies, trader licenses issued, cross border volume
	Increased cross border maize inflows from Mozambique		Likely	
Zambia (Flood-affected areas in Western, Northwestern, Central, and Eastern provinces)	Early recession of flood waters	Enhanced asset production improves food supplies and access.	Unlikely	Rate of flood recession
	Normal to above-normal staple food production		Unlikely	Crop conditions and outputs; maize prices
	Increased livestock prices		Unlikely	Livestock prices
	Significant increases in fish catches		Unlikely	Size of fish catches
Tanzania (Lake Victoria Zone, Mara and Mwanza regions)	Rapid intensification and spread of cassava mosaic and brown streak diseases	Increased vulnerability to food insecurity due to reduced cassava production – a staple in Mara and Mwanza and a buffer in the Lake Victoria zone	Likely	Rate of spread of cassava mosaic and brown streak diseases
Tanzania (bimodal areas)	<i>Masika</i> rains perform well, despite delayed start	Improved <i>Masika</i> harvests; increased pasture availability and livestock development, enhanced pastoral food security	Unlikely	Rainfall amounts and distribution
Tanzania (cotton areas in Mwanza, Shinyanga, Mara, Kagera and Tabora regions)	Enhanced market opportunities for cotton	Income earned from cotton sales will improve food access for market-dependent households.	Unlikely	Cotton market and cotton prices
Mozambique (southern Tete, northern and southern Sofala,	Staple food prices fall significantly	Increased food access for market-dependent households, especially poorer households.	Unlikely	Staple food prices
	Wetter second season (southern Tete)	Improves second season crop harvests, increased food availability and access	Unlikely	Rainfall amounts and distribution
northern Maputo, interior Gaza, and southern Inhambane)	Drier second season (northern and southern Sofala)	Reduced harvests and opportunities for agricultural labor	Likely	Rainfall amounts and distribution
	Scarcity of water (interior Gaza and Inhambane)	Exacerbated food insecurity for pastoralists and negatively impacts on pasture, livestock conditions, and livestock value	Likely	Water availability
	Livestock prices fall (Southern Region)		Likely	Livestock prices

Zimbabwe (Urban centers)	Restriction on cheaper maize meal imports from South Africa, Botswana, and Zambia	Reduced supply of maize meal; increased maize meal prices and reduced food access for market-dependent households	Unlikely	Import regulations; maize, maize meal prices
Zimbabwe (Rural areas with enough own production for the six months)	Increase in cost of non-food services (education, health, milling costs, transport)	Earlier-than-normal household depletion of food stocks from bartering for these services	Likely	Transport fares, milling cost, education and health fees
Zimbabwe (All areas, particularly urban)	Resurgence of the cholera outbreak	Decreased nutritional status and death in short periods of time.	Likely	Cholera case surveillance
Zimbabwe (Communal areas, particularly in Matabeleland provinces)	Veldt fires destroy available grazing	Reduced contribution of livestock to food access for households dependent on livestock	Likely	Grazing conditions
	Livestock disease outbreaks		Likely	Livestock diseases surveillance
Zimbabwe (Smallholder farmers' settlements near national parks)	Destruction of homestead crops by wild animals	Reduced household food availability	Likely	Wild animal, crop destruction surveillance
Zimbabwe (Central, Northern Western districts)	Reduced cotton lint prices	Decreased household income for those dependent on cotton production	Likely	Cotton prices

* Probability levels	Description
Likely	Likely to occur in the time period under current conditions
Unlikely	Could occur in the time period if conditions changed moderately
Very unlikely	Could occur in the time period if conditions changed significantly

ANNEX I: Southern Africa Monthly Price Bulletin

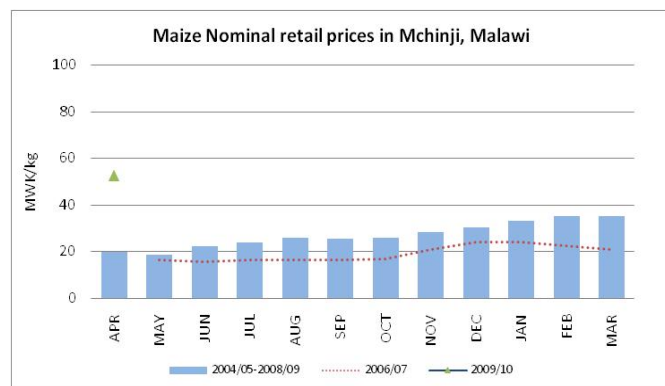
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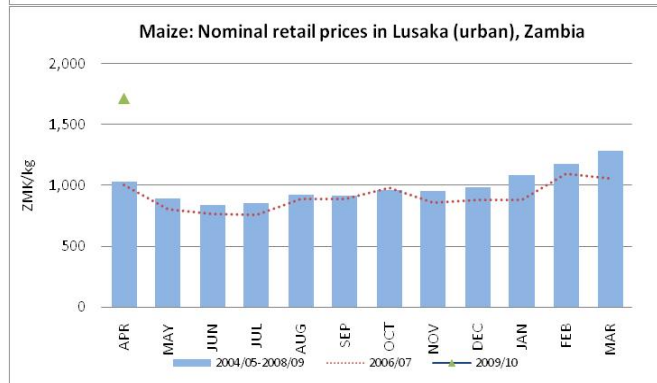
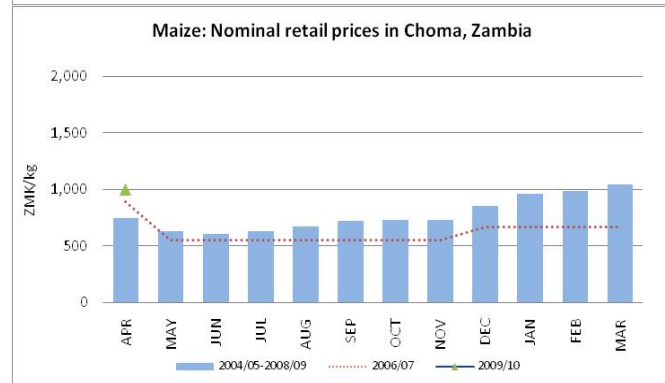
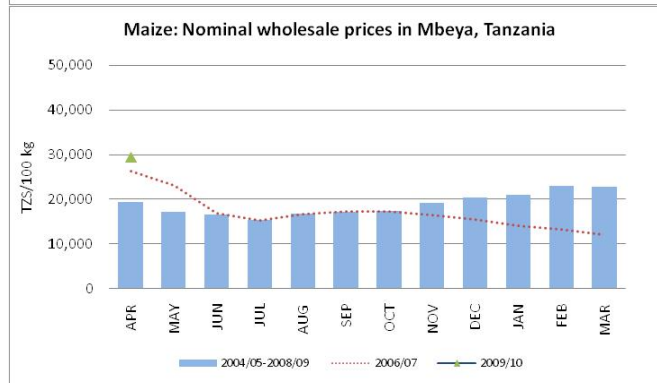
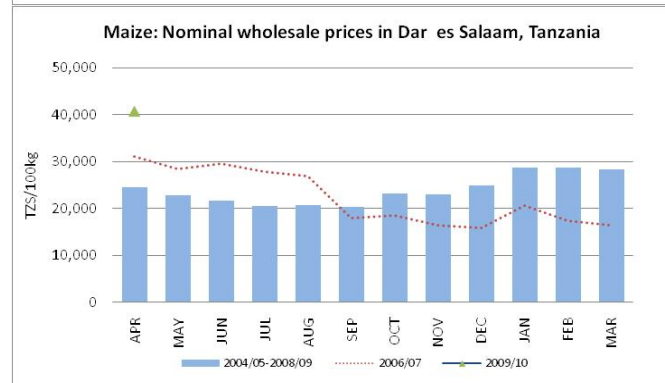
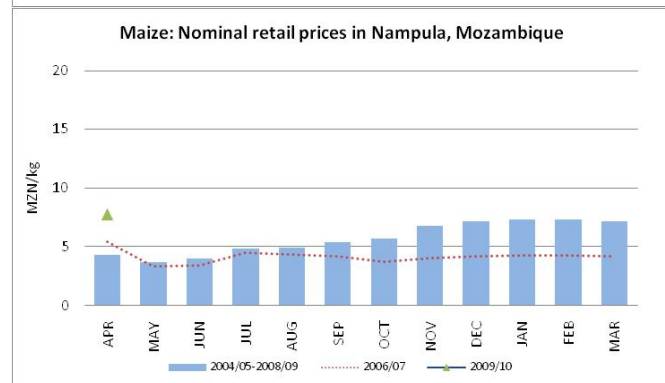
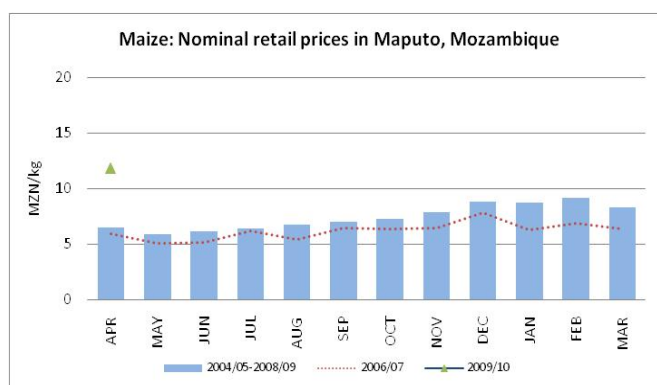
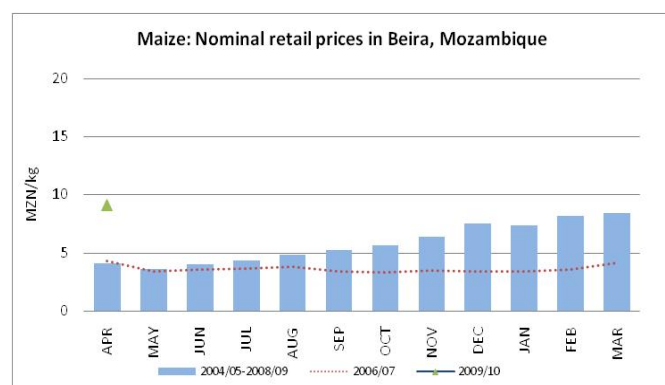


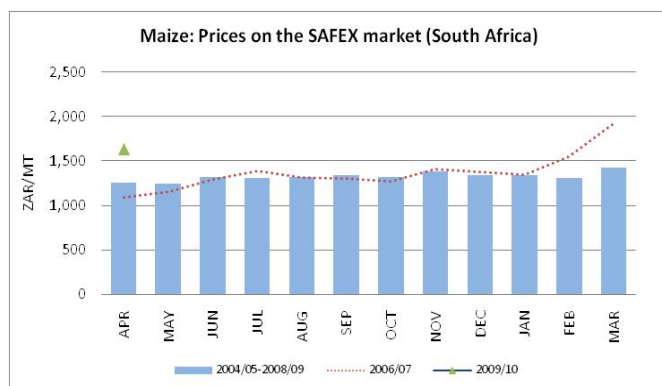
Monthly prices are supplied by FEWS NET enumerators, local government agencies, market information systems, UN agencies, NGOs, and other network and private sector partners.

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.

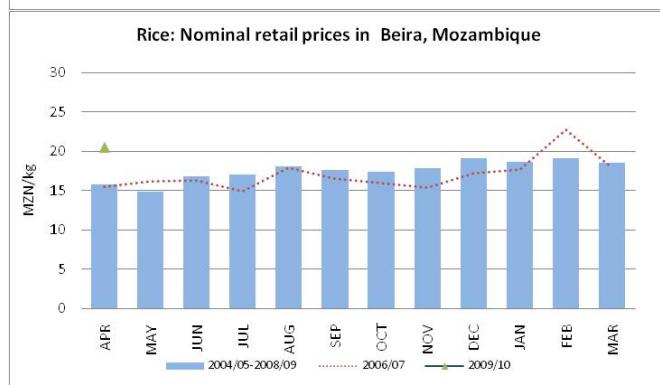
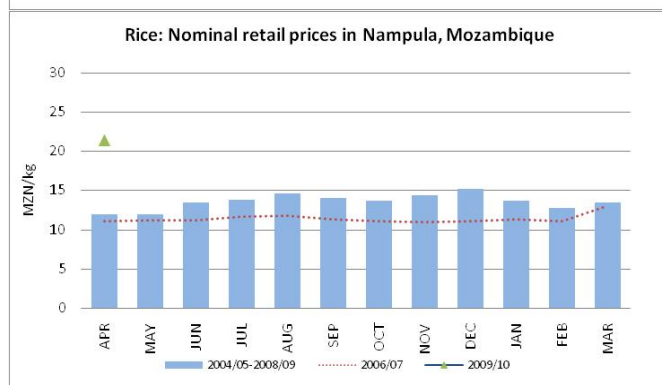
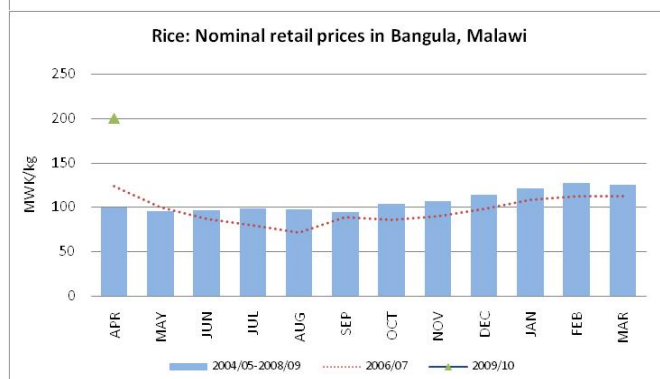
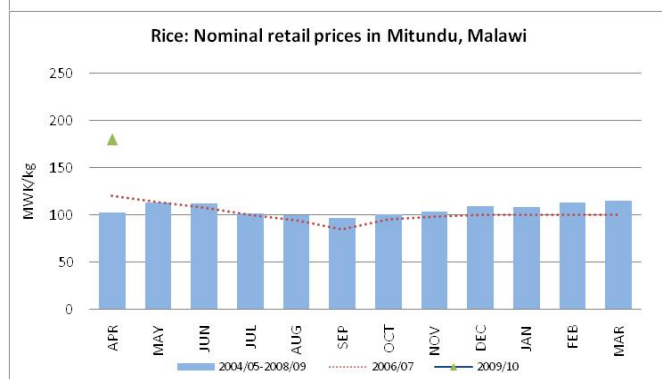
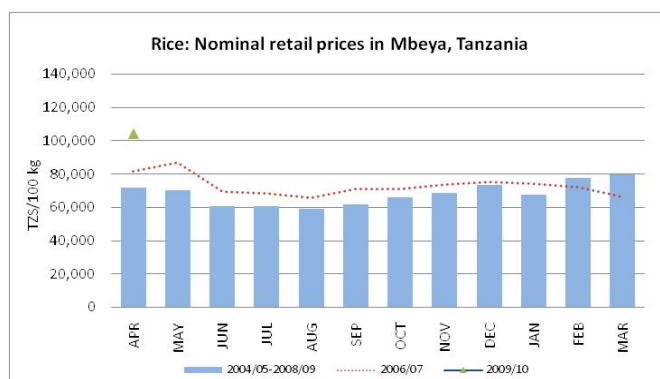
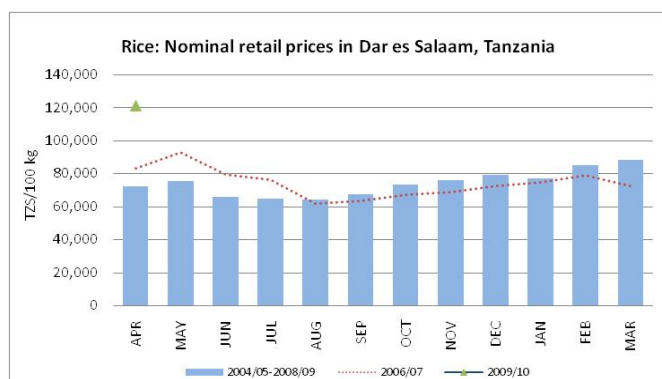
MAIZE: The markets below represent the major markets — both production and consumption— within each country in the region in addition to the SAFEX spot market prices in South Africa.

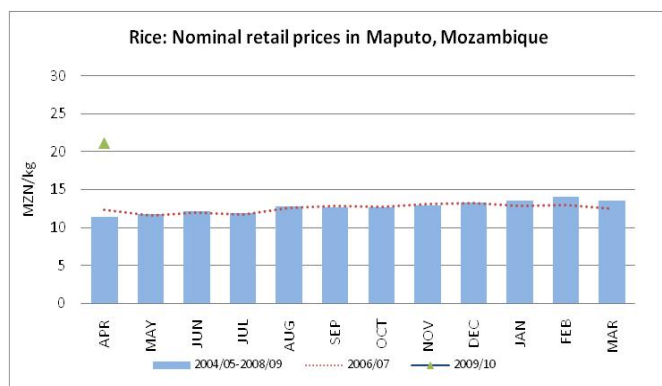






RICE: The markets below represent the major markets — both production and consumption— within each country in the region.





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

