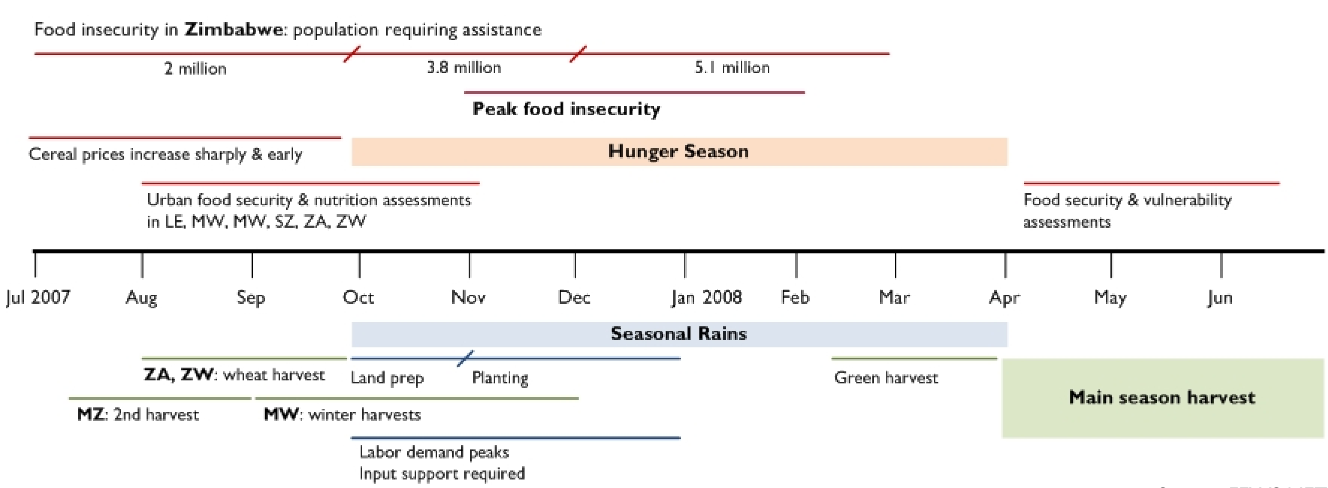
SOUTHERN AFRICA Food Security Outlook **October - March 2009**

This regional Food Security Outlook presents an overview of current food security conditions (October – December 2008) and projects food security conditions according to the most likely and worst case scenarios for January – March 2009. This report summarizes the results of the outlook process over the same period for Malawi, Mozambique, Tanzania, Zambia, and Zimbabwe. The months covered in the outlook include both the hunger season when food availability and access, and therefore food security conditions, are at their lowest, as well as the agricultural season. This report highlights what FEWS NET believes are the major threats to food security in monitored countries over this period.

Current food security conditions remain stable following the May/June harvests in most parts of the region that had favorable crop growing conditions in the 2007/08 season. Production was above the past five-year average in most countries (with the exception of Lesotho, Swaziland, and Zimbabwe) and at the regional level was above levels achieved last year. Except for South Africa, which recorded a bumper crop, the prospect of excellent harvests elsewhere was compromised by excessive rains in December and January that led to flooding in some parts, coupled with a mid season dry spell in February and March. Where there were localized crop failures, households are already moderately food insecure.

The most likely regional food security scenario through March 2009 will see levels of food security stable of in areas now facing moderate food insecurity. More significant decline is expected from October – December. The scenario however also assumes that scaled up (and well resourced) food relief programs will ameliorate conditions in affected areas, thus reducing the rates of deterioration in food insecurity. This is particularly important in Zimbabwe, where humanitarian interventions are being scaled up following the lifting of the suspension on NGO operations. It is also assumed that food availability will improve in the latter part of the outlook period with the green harvests. Favorable crop production prospects are based on the regional seasonal forecast, which indicates a normal to above normal rainfall season in most parts of the region under review, especially during the October – December period. Eastern Zimbabwe and central and southern Mozambique are likely to face normal to below normal rainfall in the latter part, thus delaying the green harvest and the gradual easing of food availability that normally occurs towards the end of the period.

Seasonal calendar and critical events timeline



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The worst case scenario would arise if the assumptions under the most likely scenario do not hold, and instead, conditions deteriorate, leading to extremely high levels of food insecurity, particularly in Zimbabwe, southern and central Mozambique, as well as southern and western Zambia, where populations face moderate food insecurity even in the most likely scenario. The situation would be further exacerbated if rainfall performance is poor, with a delayed start and/or lengthy dry spells, and if prices rise above expected levels.

Regional early warning priorities

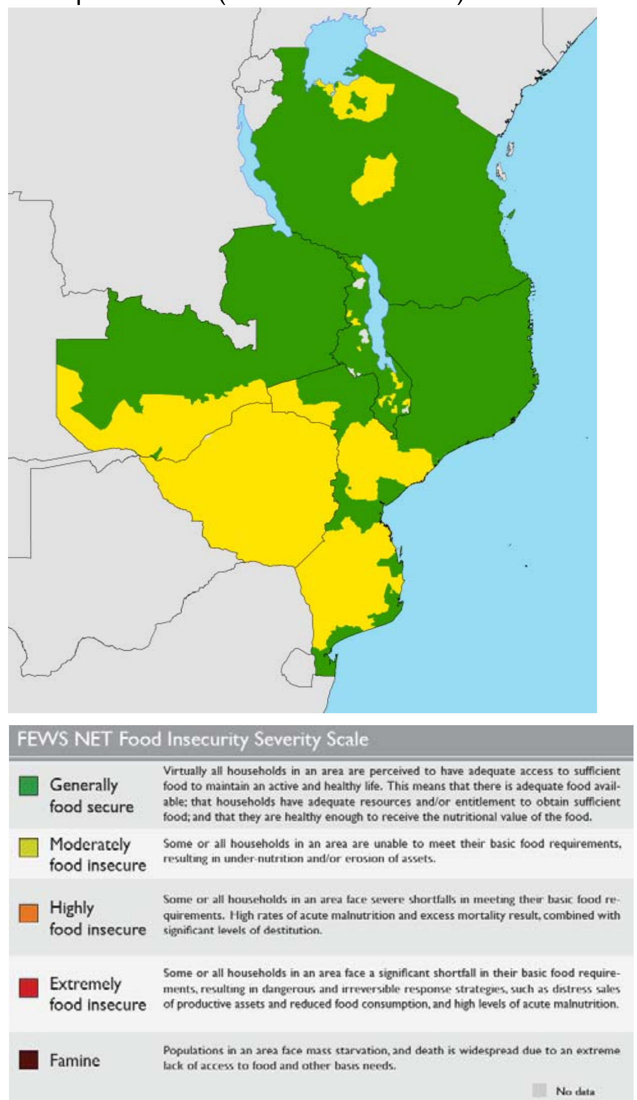
Priority Situation	Main Issues
1. Zimbabwe	**Food availability has been severely curtailed by poor harvests in the 2007/08 season and has rendered many households throughout the country moderately food insecure.** In addition to the weather shocks, Zimbabwe's food crisis is worsened by hyperinflation, price controls, fuel shortages, and economic collapse. Availability of food on urban and rural markets has remained critical as a result of already depleted on-farm stocks, inadequate commercial and food aid import deliveries, and poor internal distribution by the country's Grain Marketing Board (GMB). Food insecurity levels have been rising countrywide, particularly among the poor households who have been left without viable income generating activities amidst a hyperinflationary and politically challenged environment. In the most likely scenario through March 2009, the combination of improved deliveries of government imports and international food aid are expected to ameliorate the worst consequences of the crisis and prevent starvation. If, however, government and humanitarian imports are unable to close the national food deficit, a worst case scenario will quickly emerge, with widespread, high levels of food insecurity affecting a large proportion of both the rural and urban populations of the country.
2. Mozambique	**An estimated 302,664 people are currently food insecure and need immediate humanitarian assistance through March 2009 in eight provinces in Mozambique.** This is due to production failures associated with weather shocks, including floods and severe rainfall deficits in February/March 2008. Those now in need of assistance have inadequate access to food, are already employing extreme coping strategies, and have little or no capacity for self-recovery from these shocks. Intervention efforts are ongoing and include programs such as food relief and the provision of agricultural inputs. Although WFP has planned to address all food needs, their food aid pipeline is undersupplied, and currently only 250,000 people are being assisted. A pipeline break is expected from December 2008. In the most-likely scenario, deterioration in food insecurity conditions will be mitigated over the period October to December and improve significantly from January to March 2009. This improvement will result from adequate humanitarian assistance, a good start of the rains in October, and good distribution of rains throughout the rainy season, and the availability of the green harvest from January/February 2009. If these assumptions do not hold, a worst case scenario will develop, and food insecurity will deteriorate with an additional 242,600 people requiring assistance by October 2008 and through March 2009.

Current food security conditions

Current food security conditions remain generally satisfactory in those parts of the region where food crop production was enhanced by favorable crop growing conditions last season. Elsewhere, and especially in Zimbabwe, southern and parts of central Mozambique, and southwestern Zambia, populations have been assessed as being moderately food insecure (see figure 1). In these areas, many households have depleted what little harvest they had, and are now depending on markets to purchase food. Overall, staple food prices have been rising unseasonably this year and remain much above average for this time of year. Local prices normally decline during the harvest period and remain stable until July or August, when they start to rise. This year, prices did not drop to expected levels and started increasing as early as June in some markets (as in Malawi). The high staple food prices that continue to prevail have effectively reduced households' ability to access adequate quantities of food from the markets, and many of them have begun using various coping strategies to make ends meet. Food security and vulnerability assessments undertaken in May/June (and in August for Zimbabwe) confirmed that the majority of households in areas affected by weather related shocks would face various levels of food insecurity, and that most would require some form of assistance, some as early as July 2008.

In **Zimbabwe**, poor crop production levels in the 2007/08 season left many households throughout the country moderately food insecure. Availability of food on the market has therefore remained critical as import deliveries have also been well below requirements. The economic collapse and political instability have contributed to shortages of foreign currency and limited supplies of food on the market, exposing vulnerable households to critical food shortages. In rural areas, almost all staple cereals from the poor harvests in 2008 have run out, and the situation is critical in the grain deficit areas of Matabeleland. Lack of access to food has been compounded by the delayed humanitarian assistance due to the suspension of NGO operations by the government between June and August 2008. In urban areas, food security has also remained critical, particularly among poor households who, because of hyperinflation and the politically challenged environment that has prevailed for a long time in the country, have been left without viable income generating activities. Since the suspension on NGO operations was lifted in August, humanitarian agencies have moved ahead with plans to import and distribute food aid to assist vulnerable households, including desperately poor households, the chronically ill, and other vulnerable groups. The plan is to scale up assistance to cover up to 5.1 million beneficiaries over the January to March 2009 period. Currently, commercial and humanitarian agencies are trying to import 1,164,000 MT of cereals to meet national requirements under the current consumption year and allow some carry-over stock into the next year. However, delivery rates have not been on target, and government and humanitarian agencies have to redouble efforts to ensure that they are able to manage the national food shortages.

Figure 1. Current estimated food security conditions, third quarter 2008 (October - December)



Source: FEWS NET

The majority of households in the north and most parts of the central region of **Mozambique** still have sufficient food from own-production. However, in southern and parts of central Mozambique that suffered the impact of weather related hazards, food insecure households have already exhausted their food reserves and have limited coping abilities, particularly because of high food prices, limited purchasing power, and water shortages. In May, the SETSAN/GAV estimated that 302,700 people in these areas were food insecure and would require immediate food assistance through March 2009. There are indications that food insecurity is worsening in most of the drought affected areas. Currently about 250,000 of the assessed food insecure people are being assisted. However the WFP food pipeline is under-supplied, and a pipeline break is imminent. According to WFP, the pipeline is sufficient to cover the needs of these 250,000 beneficiaries only through December. Food for both emergency and nutritional operations is vital. Unless the pipeline is replenished, WFP and partners will not be able to expand feeding programs to meet all of those in need, and are likely to reduce the ration for existing beneficiaries. This will further undermine the food security of already vulnerable and malnourished households.

In **Malawi**, where the 2007/08 main season harvest was assessed as adequate to meet domestic requirements, most rural households are still relying on own-farm stocks to meet their food requirements and their food security conditions remain satisfactory. However, many households remain at risk of moderate food insecurity in parts of southern and central Malawi and parts of Mzimba district in the north, due localized crop production failures as well as the prevailing high food prices. The VAC assessment in May revealed that up to 1.5 million people could be at risk of food insecurity, especially if food prices that were already 100-150 percent above average increase again at unprecedented rates. However, the government's imposition of maximum buying and selling prices has, since September, kept prices stable for the time being, and prices have even fallen on some markets. An update of current conditions is expected from the VAC around November/ December. This will confirm current levels and the severity of food insecurity in the affected areas. Market dependant urban households have also been assessed as being at risk of food insecurity due to the high cereal prices, though the recent drop in September may have eased the situation slightly. Ongoing monitoring will be required to see whether continued adequate availability of maize on local and ADMARC markets will stabilize prices at these lower levels.

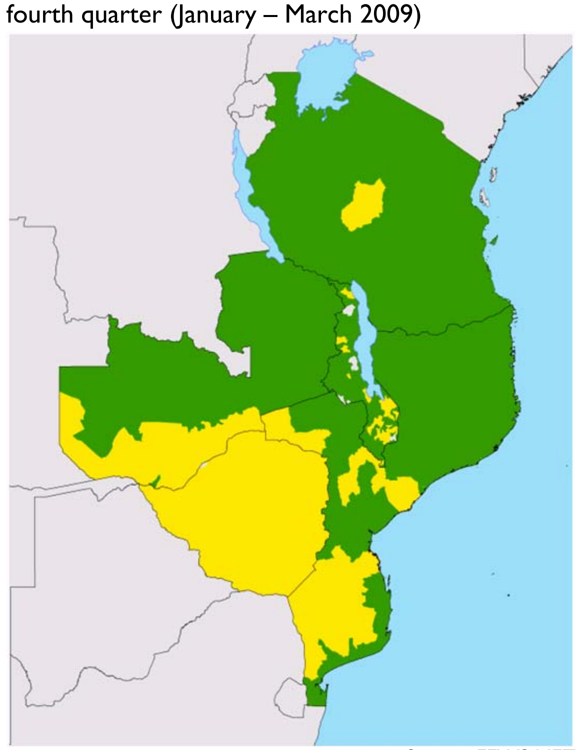
Apart from those areas in southern **Zambia** where excessive rains reduced harvests, the current food security situation in Zambia is generally satisfactory. The affected population in the south, estimated at close to 450,000, will need food relief until the next harvest in March 2009. Relief food distribution by the governments' Disaster Management and Mitigation Unit (DMMU) is still ongoing; however, more resources are likely to be required to meet the needs through to March 2009. At the national level, maize supplies seem to be tightening faster than would be expected going according to the Ministry of Agriculture's estimates. Consequently, traders have requested to import enough stocks to last till the early commercial harvest in March becomes available. An estimated 50,000 MT of imports are assessed as sufficient to cover the projected shortfall.

In **Tanzania**, the majority of rural and urban households remain generally food secure following average 2007/08 harvests. Conditions are expected to remain satisfactory from now until the next harvests in 2009. Nonetheless, a rapid vulnerability assessment carried out in the localized areas of some districts in Mwanza, Shinyanga, and Singida regions, where harvests were compromised by a poor 2008 *vuli* season, delayed and below normal *masika* rains, and flash flooding, identified about 241,000 people as food insecure and requiring immediate assistance. This food insecurity is driven not only by poor harvests, but also by the increasing fuel and transportation costs and above-normal increases in food prices earlier this season.

Most-likely regional food security scenario

The most likely regional food security scenario between January and March 2009 should see a continuation of current food security conditions in most areas. Areas currently classified as generally food secure are expected to remain so till the end of March. Some areas where moderate levels of food insecurity currently exist (parts of southern and central Mozambique) are expected to show improvement as a result of improved food availability. This will come about as a result of up-scaled food distribution programs both by governments and humanitarian agencies as well as the availability of the green harvest to augment supplies. Improvements in the bimodal areas of northern Tanzania will result from favorable *vuli* harvests. The table below summarizes the most likely scenarios for each country in the region covered by FEWS NET and the food security implications of these scenarios.

Figure 2. Most likely food security conditions, fourth quarter (January – March 2009)



Source: FEWS NET

Most likely food security scenarios January – March 2009		
Country	**Scenario assumptions**	**Food security implications**
Malawi	▪ Most households have enough food from the crops harvested this season, or will be able to access them from the market. ▪ ADMARC markets and private traders will sell maize at prices affordable to poor consumers. ▪ Maize prices will remain stable following government intervention to ban local private trade in maize. ▪ The maize export ban will remain in place throughout the season. ▪ Domestic availability of maize will remain adequate throughout the period, boosted by the export ban and by private traders releasing their stocks during the hunger season and expectation of a good 2008/09 season.	▪ Food security conditions will remain generally satisfactory through the hunger season for most households in areas where production levels were generally good. ▪ Stable and affordable prices on ADMARC markets as well as other local markets (due to adequate availability) will enhance households' access to food. ▪ In areas facing localized shortages, a growing number of households will face moderate food insecurity. ▪ Poor, chronically food insecure households in both rural and urban areas will face growing levels of food insecurity during this period.
Mozambique	▪ Neutral ENSO conditions prevail (no significant La Niña or El Niño conditions). ▪ Limited contribution of the second season production leads to a longer-than-normal hunger period in the center and south. ▪ Maize prices across the country are abnormally high (almost double the average in the center and north). ▪ The effects of wildfires in the central region in 2008 continue to impact food insecurity in localized areas. ▪ The rains start on time and are adequate. ▪ Supply of and access to seeds and inputs is timely and adequate. ▪ The food aid pipeline is replenished and adequately resourced.	▪ Food supplies are tight in the southern and central parts of the country, although second season production will augment supplies for a limited number of households where such production has been favorable. ▪ Very high prices will persist until the green harvest in February, limiting food access by vulnerable households. ▪ Adequate responses, especially emergency food distribution to households facing food shortages, will improve conditions in the worst affected areas of the south and parts of the center. ▪ Food supplies in the north and parts of the center will be stable and generally satisfactory. Internal flows from north to south will continue to be inadequate, necessitating imports from neighboring South Africa.
Tanzania	▪ *Vuli* rains perform normally in bimodal areas. ▪ *Musimu* rains start on time and continue without significant interruption in unimodal areas. ▪ Pasture conditions in rangelands improve. ▪ Fuel prices stabilize, but remain high. ▪ Food prices increase seasonably, but remain affordable. ▪ Export ban on maize remains in place.	▪ Stable and generally food secure conditions due to good harvests of *musimu* and *masika* food crops. ▪ Conditions will further improve following *vuli* harvests from January – March 2009. ▪ Markets will be adequately supplied, and prices, though higher than average, remain affordable for market dependant households. ▪ Pastoralists and agro-pastoralists will also face stable conditions.
Zambia	▪ Moderate to severe impacts of floods and the prolonged dry spell on 2007/08 production in southern Zambia. ▪ Reduced supply of staple food as a result of very low carryover stocks and only average production. ▪ Low private sector import of maize, if any, due to potential government restrictions on private sector maize trade and low FRA selling prices. ▪ Food Reserve Agency will release maize stocks on the market for sale towards the end of the marketing year.	▪ Food relief assistance will continue to be required in localized areas facing food insecurity (especially in southern Zambia) as a result of poor harvests last season. ▪ Dwindling household and national food supplies will result in an increase in the size of the population requiring assistance which can be made available from strategic grain reserves. ▪ Elsewhere, food security conditions will remain satisfactory. ▪ In view of dwindling national supplies, moderate imports (about 50,000 MT) are likely

	▪ Early maize harvests by commercial farmers to be available on the market by end of March. ▪ Maize prices will remain relatively high and above the recent two previous seasons. However, prices are likely to stabilize when FRA stocks are released on the market. ▪ Maize export ban will remain in force during the 2008/09 marketing season. ▪ Timely start of the 2008/09 rainy season.	to be required to keep markets adequately supplied. ▪ Prices are expected to remain higher than last year and rise above the past 5-year average. ▪ The early maize harvest in March is likely to be larger than normal as commercial farmers take advantage of prevailing high prices reducing the amount of imports that may be required.
Zimbabwe	▪ The international community will respond to UN appeals for food assistance support. ▪ General food aid distribution programs will intensify and improve food availability in rural areas and targeted urban communities. ▪ Imports will be scaled up and the national cereal gap will be significantly reduced through both commercial and food aid imports. ▪ Grain Marketing Board (GMB) maize grain and maize meal distributions will continue to be erratic and inadequate. ▪ Basic commodities will continue to be in short supply on the formal market, and will predominantly be available on the parallel market at exorbitant prices. ▪ Green harvest in February and March will be small due to reduced area planted as a result of below normal rains and inadequate inputs. ▪ High levels of formal unemployment, hyperinflation, and local and foreign currency shortages prevail.	▪ Rural and urban households throughout the country who have no food reserves or lack income will remain food insecure and depend on humanitarian assistance. ▪ Emergency assistance will be required for over 5 million food insecure people in order to mitigate widespread starvation. ▪ In urban and rural markets, the supply of cereals will continue to be erratic and inadequate, due to the limited distribution capacity of the GMB, which maintains its monopoly of domestic procurement and distribution of maize. ▪ The bottlenecks in grain distribution will constrain household food access and further increase levels of food insecurity, especially in the most grain deficit areas in the south western parts of the country. ▪ Although the outlook for 2008/09 rainy season is not entirely positive, the onset of rains and field activities may help mitigate the some of the negative impacts of the food crisis by availing seasonal labor opportunities, and improving food supplies through seasonal crop harvests in February and March.

Priority worst case food security scenarios

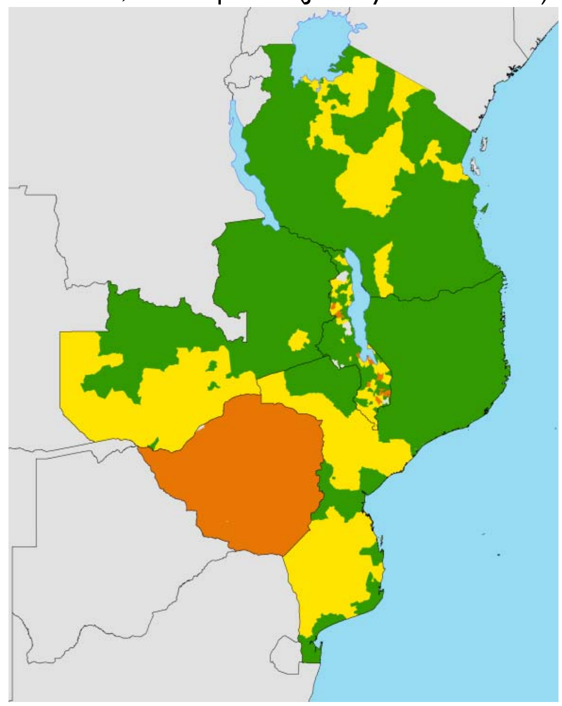
Zimbabwe

Food security conditions will be critical in the worst case scenario, and food insecurity will deteriorate to alarming levels. Planned commercial and humanitarian cereal imports needed to bridge the country's cereal gap this marketing year will not materialize, and internal distribution of cereals by the GMB and NGOs will be complicated by shortages of fuel and transport. The lack of maize seed at the beginning of the season will lead to delayed planting and a reduction in total area planted. The second half of the rainy season will be characterized by dry spells and an early end of rains. The combination of late planting, fertilizer shortages, and drier than normal conditions in the second half of the season will lead to significantly reduced harvests, with limited potential for early green harvests in February and March. Meanwhile, political instability and economic decline will continue to constrain the ability of the government, commercial, and humanitarian sectors to address critical food shortages in the country. Households will struggle to meet their food requirements due to limited food supplies on formal and informal markets, as well as shortages of local and foreign currency and limited labor opportunities.

Availability of food and basic commodities remain critical in urban areas, and these commodities will only be available on the parallel market at very high prices. Hyperinflation continues to erode the purchasing power of households. In most major cities and rural centers, maize grain prices will continue to increase steadily during the hunger period, creating accessibility problems for most households in both urban and rural areas.

Urban households will be exposed to cholera and other health hazards caused by poor water and sanitation systems. Health services will continue to deteriorate, becoming increasingly inaccessible to the majority of the urban poor, and a greater level of support to the health sector will be required.

Figure 3. Worst case scenario food security conditions, fourth quarter (January – March 2009)



Source: FEWS NET

Mozambique (South and Center)

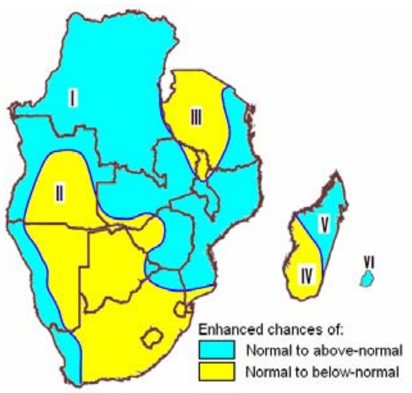
In the worst-case scenario from January to March, low food availability and weather shocks will increase levels of food insecurity in the southern and central regions of Mozambique. This scenario assumes inadequate humanitarian assistance, a poor 2008 second-season harvest, extremely high staple food prices (almost double the average), and a delayed start of the rainy season with long dry spells.

In addition to the 300,000 people that have been food insecure in the previous quarter, another 242,615 people that are currently at risk of food insecurity in the country will become moderately food insecure. Low food availability will be compounded by inadequate humanitarian assistance, especially in the drought-affected areas in the south and center. These conditions will be exacerbated by extremely high food prices and deteriorating terms of trade between household livestock and cereal, especially in remote areas where such transaction are made in kind. The hunger season could be longer and more severe than normal. As a result, more than 540,000 people may need food assistance and water interventions during this time.

The delayed start and erratic performance of the rains from October to December will have caused households to attempt multiple plantings and delayed the effective planting date. This could delay the potential availability of food from early green harvests, and consequently prolong the duration of the hunger period. However, in most areas, as the initial crops are harvested, slight improvements in food security are still possible, and even in the worst case food insecurity is not expected to deteriorate past moderate levels.

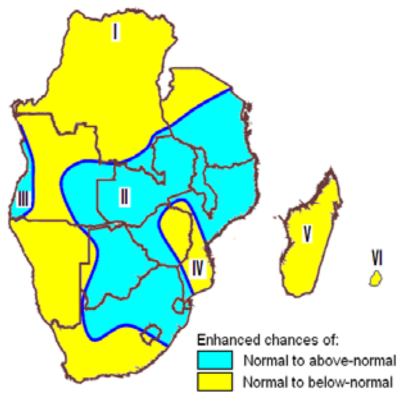
SADC Regional Climate Outlook Forum

Figure 4 a: SARCOF rainfall forecast, October-December 2008



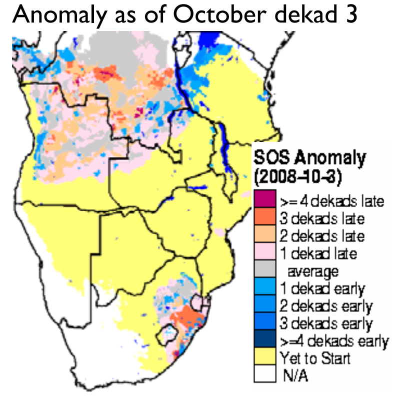
Source: SADC FANR

Figure 4 b: SARCOF rainfall forecast, January-March 2009



Source: SADC FANR

Figure 4 c: Start of Season Anomaly as of October dekad 3



Source: FEWS/USGS

The Southern Africa Regional Climate Outlook Forum (SARCOF), held in August 2008, produced a consensus probabilistic rainfall forecast for the 2008/09 rainfall season. The forum's forecast findings are presented for the first half of the season (October-December 2008) in figure 4a and the second half of the season (January-March 2009) in figure 4b. In the second half of the season, rainfall conditions are expected to deteriorate to normal to below-normal levels in central and northeastern Zimbabwe and southern Mozambique, as well as most of the DRC, northern Angola, coastal Namibia, the Atlantic coastal area of South Africa, and northern Madagascar. Rainfall conditions are expected to be normal to below-normal through the six-month season in northern Tanzania, southern Madagascar, southern Swaziland, eastern Namibia, parts of southern Angola, and parts of southern South Africa.

Figure 4c shows the start of season anomaly as derived from satellite rainfall imagery, and indicates that as at the end of October, the start of season is still within the normal range in most parts of the region, except notably parts of South Africa in the eastern Cape and KwaZulu-Natal, as well as parts of Swaziland and Lesotho in the south, and northern Angola and small portions of northern Zambia to the north. Nonetheless, for most of these areas, the delay is only by a dekad or two, and does not as yet constitute serious concern (particularly in the north). Ground reports from Lesotho however do indicate that this delayed start has affected normal field activities for this time of the year – planting of the sorghum and maize crops has been delayed and the Department of Metrological Services is warning that further delays may prove disastrous for agricultural activities.