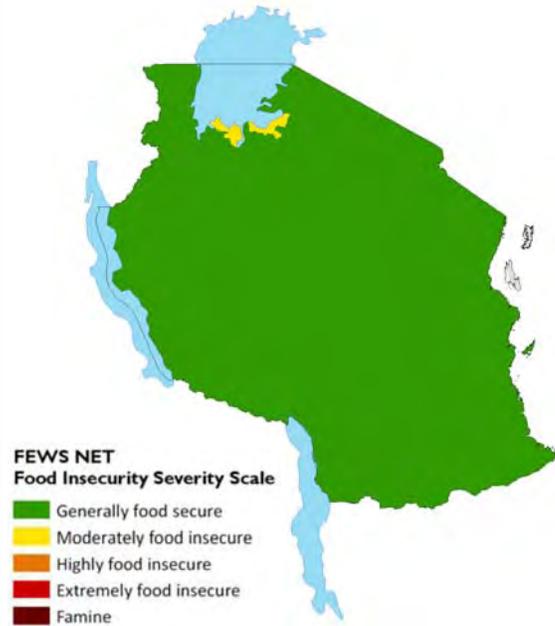


TANZANIA Food Security Outlook

October 2008 to March 2009

- The majority of the population in both rural and urban areas is currently food secure. However 240,544 people in localized areas of ten districts in Mwanza, Shinyanga, and Singida regions are moderately food insecure due the effects of 2008 *vuli* crop failure, below normal performance of *masika* rains, increasing transportation costs, and above-normal increases in food prices.
- In the fourth quarter of 2008, households will likely remain generally food secure. Food prices will increase seasonably, but most households will have sufficient access given good recent harvests. The *vuli* and *msimu* rains will start on time, enabling agricultural activities to resume, generating income-earning opportunities. The *vuli* harvest in January/February will increase food availability and access.
- In the worst-case scenario there will be flash floods due to above-normal *vuli* rains in bimodal areas. These floods will destroy crops and roads, and temporarily displace people. In unimodal areas, limited casual labor opportunities and rising prices will constrain food access, leading to an increase in the size of the food insecure population. Pest outbreaks and crop and livestock diseases will further aggravate the situation.

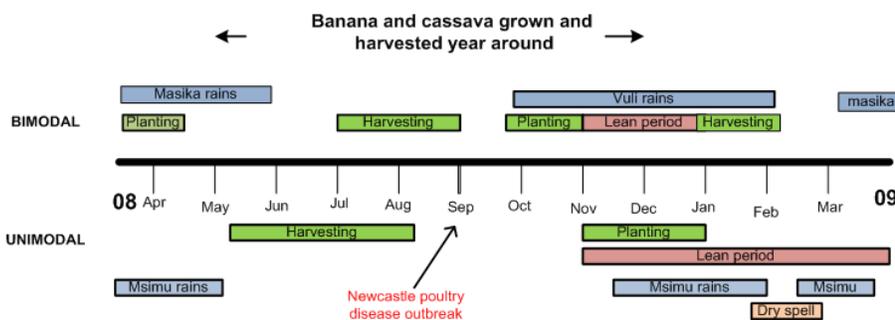
Figure 1. Current estimated food security conditions, September 2008



For more information on FEWS NET's Food Insecurity Severity Scale, please see: www.fews.net/FoodInsecurityScale

Source: FEWS NET

Seasonal timeline and critical events



Current food security conditions

The majority of the population in both rural and urban areas is generally food secure following average harvests during the last cropping season. However, the September RVA, conducted by FSIT, identified 240,544 food insecure people in localized parts of Magu, Misungwi, Ukerewe and Kwimba districts (Mwanza region), Bariadi, Shinyanga Rural, Kishapu and Meatu Districts (Shinyanga region), and Manyoni district (Singida region). This population is moderately food insecure due the effects of poor 2008 *vuli* crop production, delayed and below-normal *masika* rains, flash flooding, increasing fuel and

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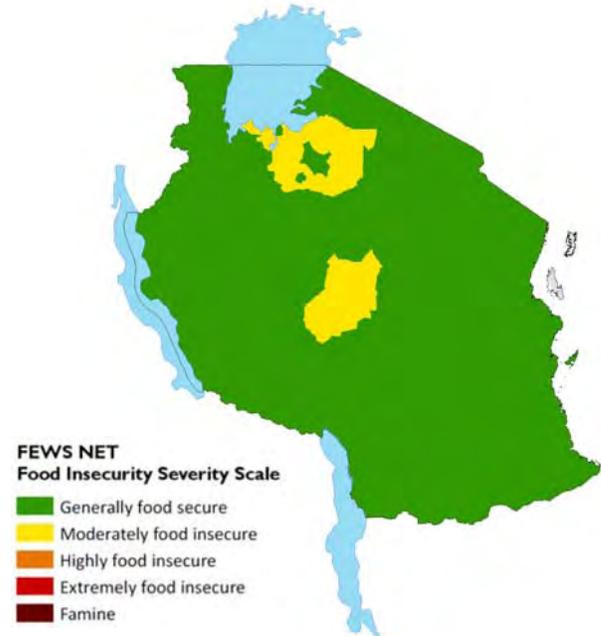
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transportation costs, and above normal increase in food prices. The RVA recommended 7,182 MT of food programmed to assist this group (359 MT to be distributed for free to the destitute and 7,182 MT to be sold at a subsidized price).

Currently, markets are well supplied from the recent harvests. However, food prices in all monitored rural and urban markets have remained above the five-year average and last year's prices and continue to constrain food access for low income, market dependant households. In addition, high food prices have not increased producer income because general inflation, and high transport costs resulting from increased fuel prices have increased production costs.

The prices of maize and beans have risen in surplus-producing areas of Mbeya, Sumbawanga and Iringa, likely due to traders purchasing food in large quantities for transport to other areas of Tanzania. In deficit producing areas, prices have stabilized or shown a decreasing trend, indicating that increased food supplies are making their way to these markets. Prices are likely to follow the typical trend and increase during the lean period.

Figure 2. Estimated food security conditions, October – December 2008



Source: FEWS NET

Currently, prices in urban areas also remain above the five-year average and last year's price levels. However, these rising prices have not been accompanied by wage increases or new employment opportunities. Thus, the purchasing power of urban households has declined. This situation exists in all urban areas, but is particularly serious in Dar es Salaam, Arusha, Mwanza and Tanga where high unemployment and scarcity of land for urban agriculture exists. Urban markets are expected to benefit from growing trader stocks and because farmers in rural areas are expected to release additional stocks in order to procure inputs for the coming seasons.

Pasture conditions in rangelands area are stable in most parts of the country. Exceptions include northern areas bordering Kenya, from Kilimanjaro to Engaire Naibor (Longido District), where pasture has been depleted. Water availability for livestock continues to be satisfactory and livestock body conditions are good. Currently however, the terms of trade between livestock and grain are less favorable to pastoralist than last year due to above normal food crop prices. Pastoralist households should purchase cereals and stock food for the future before cereal prices increase during the lean period.

Adequate availability of water in lakes, rivers and ponds has continued to benefit inland fishing livelihoods and the current housing construction boom, following increased availability of credit services, is generating increased wage labor opportunities in urban areas. Adequate water in rivers and dams is also facilitating wage labor opportunities in urban areas through the stabilization of hydropower generation for industrial usage.

The recent rapid vulnerability assessment (RVA) identified a number of factors likely to influence food security in vulnerable areas in the near future. These include food and cash crop prices, the overall performance of the 2008/09 season, the degree of improvement in pasture conditions, availability of casual labor opportunities and control of crop pests including rodents and armyworms. These factors should be monitored closely to allow early detection of deteriorations in food security conditions.

Most-likely food security scenario – January to March 2009

Food security is likely to remain stable during the fourth quarter of the year, and will further improve during first quarter of 2009 after the *vuli* harvest in bimodal areas. The 2008 *vuli* rains are forecast to start on time in September and be normal

to above-normal, thus contributing to increased food availability after the January/February *vuli* harvest. The *msimu* rains will start in mid-November.

The availability of non-cereal crops that are not easily processed and stored (e.g. sweet potatoes, yams, vegetables and fruits) will diminish from October onwards, putting upward pressure on cereal prices. In combination with increased transportation costs, which have resulted from increasing international fuel prices and government tariffs, this pressure will contribute to seasonal price increases. Cereal prices will continue to be above five-year averages and last year's prices through December. Cross-border food trade outflows will remain below normal following the government export ban imposed on cereals from May 2008.

The timely start of the rains will generate agricultural labor opportunities (e.g., land cultivation, planting, weeding and fertilizer application), an important source of income for poor rural households. When the rains begin, farmers will release stocks on the market in order to purchase necessary agricultural inputs. Local warehouses will also start selling their stocks. Both will improve food availability, and in combination with increased income from the agriculture casual labor opportunities, will allow net-consuming households to access sufficient food on the market, even as prices increase following normal seasonal trends. However, producer households are unlikely to benefit from increased prices because costs of farm operations have also risen, especially input prices. Fertilizer costs have double or tripled since 2007. A 50kg bag of DAP fertilizer that was selling at TZS 40,000 now costs TZS 120,000, while the subsidized DAP has increased from TZS22,000 to TZS 45,000. For the other types of fertilizers, the cost has increased from TZS 22,000 to TZS 35,000 per 50 kg bag. Wage rates will also increase, in response to general inflation, further increasing farm operations costs. The increased cost will limit use of tractors and fertilizers by the poor and medium producers who are not able to access bank credit. Increased production costs will lead to decreased acreage and decreased input use, resulting in lower 2009 crop production.

The food security of pastoralist and agro-pastoralist households is expected to remain stable. Depleted pastures in north and northeast will recover following soil moisture replenishment following the start of the *vuli* rains in September.

Normally the *vuli* season contributes 30 percent of total food production in Tanzania, primarily beans, vegetables and fruit. It is therefore expected that by January/February there will be a further increase in food availability, both within producer households and in markets, leading to an improvement in food access and diet quality. In this scenario, food security conditions will improve relative to the current situation and general food security will be better than normal for this time of year. Due to normal to below-normal rains forecast for the unimodal areas, however, it is likely that the central parts of the country will have low production and that Manyoni district is likely to be moderately food insecure (Figure 3).

Table 1. Scenario indicators and triggers

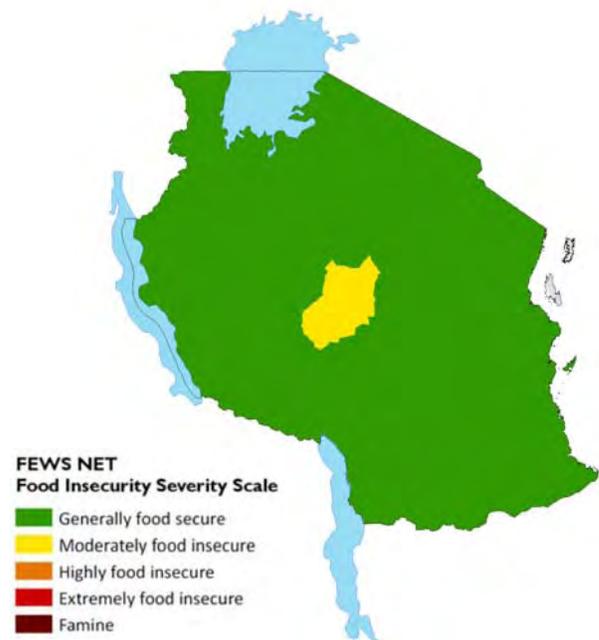
Most-likely food security scenario

- *Vuli* rains perform normally in bimodal areas
- *Msimu* rains start on time and continue, without significant interruption, in unimodal areas
- Pasture conditions in rangelands improves
- Fuel prices stabilize but remain high

Worst-case food security scenario

- Excessive rains, resulting in floods in bimodal areas.
- Delayed start to *msimu* rains and below-normal rainfall in unimodal areas.
- Uncontrolled rodents and armyworm outbreaks
- PPR in Kenya spreads into Tanzania
- Shortages of PPR vaccines and prophylaxis accaracide for controlling tick borne diseases
- Cassava mosaic disease spreads

Figure 3. Most likely scenario, January – March 2009



Source: FEWS NET

Worst-case food security scenario – January to March 2009

September to December constitutes an important rainfall season in bimodal areas (*vuli* rains). According to the 22nd Greater Horn of Africa Climate Outlook Forum (GHA COF 22) there is an increased likelihood of normal to above-normal rainfall over much of the northern, northwestern and northeastern portions of the country. In the worst-case scenario, in bimodal areas, these above-normal rains will cause floods in some areas, destroying crops and road infrastructure, and temporarily displacing people in flooded areas. The forecast by COF 22 has also indicated that much of the central and southern areas of the country will receive normal to below-normal rains. In the worst case scenario the rains in unimodal areas will be below-normal and the season will likely be affected by an extended dry spell. This will have a very negative effect on crop production. Food insecurity will intensify in parts of Mwanza, Shinyanga, and extend into localized areas in Kilimanjaro, Dodoma Singida and coast regions.

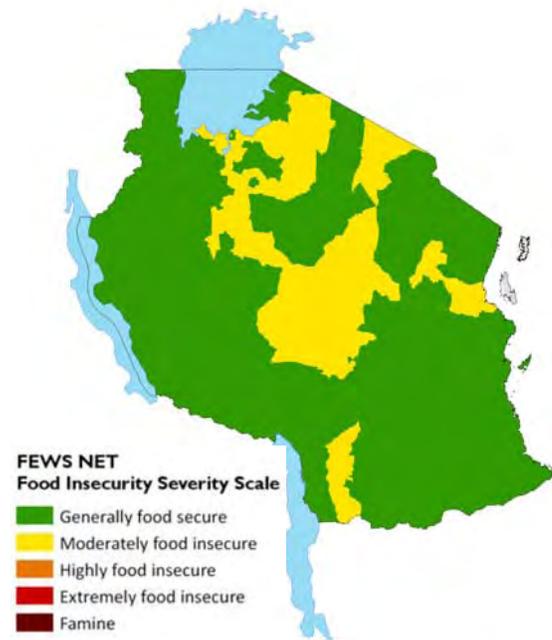
In this scenario, below-average production will occur in the central parts of the country and lowland areas of the southern highlands. This means that household food stocks will be depleted during the lean period and that agricultural labor opportunities will be limited, constraining food access, mainly for poor households. An armyworm outbreak in unimodal areas would further aggravate the food situation in the households that will experience poor rains.

Inefficient prevention efforts and a lack of plant protection programs to control cassava mosaic disease (CMD) will result in the spread of this disease, leading to shortages of cassava, a drought tolerant crop which contributes a substantial proportion of households' food basket in drier and marginal agricultural areas of Lake Victoria and western zones. Cassava is a normal alternative buffer crop to bananas during the extended dry spell and a decline in yields will limit food availability in producer households.

Also in this scenario, *peste de petits ruminant* (PPR) will also spread from Kenya into Tanzania. This would reduce food security among pastoralists through the loss of livestock weight and market value, reduced calving and milk production and reduced meat and milk consumption by other household members who do not migrate with the livestock.

In this scenario, the total number of food insecure households will increase substantially relative to the current situation. Many households throughout Tanzania will be moderately food insecure, and households in localized areas of Singida, Mwanza, Shinyanga, Dodoma, Pwani, Arusha Regions will likely deteriorate to high levels of food insecurity.

Figure 4. Worst case scenario, January – March 2009



Source: FEWS NET

An armyworm outbreak in unimodal areas would further aggravate the food situation in the households that will experience poor rains.