SOUTHERN AFRICA Food Security Outlook April to September 2010

- The most likely food security scenario for the SADC region between April and September would see a continuation of the current generally food secure conditions in most areas, except where shocks have compromised food availability and access and where localized chronic cases exist. The projected average to above-average cereal harvests are assessed to be sufficient to meet the region's requirements for the next six months and beyond.

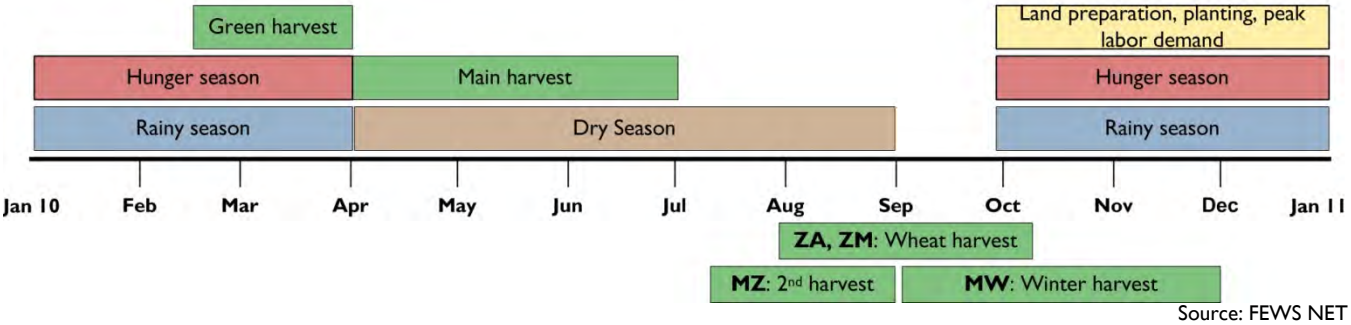
- Current reports indicate that household food supplies have improved and food security has been enhanced particularly in those areas where agricultural activities benefited from favorable rainfall performance. Increased on-farm food supplies have eased pressure on local markets and prices have stabilized, and in most cases, began dropping much earlier than usual.

- Overall, national cereal harvests across the region are expected to be better than last season. Increased plantings and the favorable crop-growing conditions in South Africa (the region's main producer of maize) have resulted in a bumper maize harvest estimated at 13.71 million MT. This total, plus over two million MT of carryover stocks, will result in a projected exportable surplus of close to four million MT.

- While this year's harvests are projected as being sufficient to cover national domestic requirements in Malawi, Tanzania, Mozambique, and Zambia, pockets of localized food shortages are expected in areas that were directly affected by the combined shocks of droughts and floods including southern Malawi and central Mozambique. Grain will have to be moved from surplus to deficit areas and/or imported to cover the needs of populations facing food shortages.

- In traditionally grain deficit countries, including Zimbabwe, general improvement in harvests and food availability are also indicated. Ongoing food security and vulnerability assessments across the region, which should be completed by June/July, will better inform decisions on interventions and response strategies required over this outlook period and beyond.

Seasonal calendar and critical events timeline



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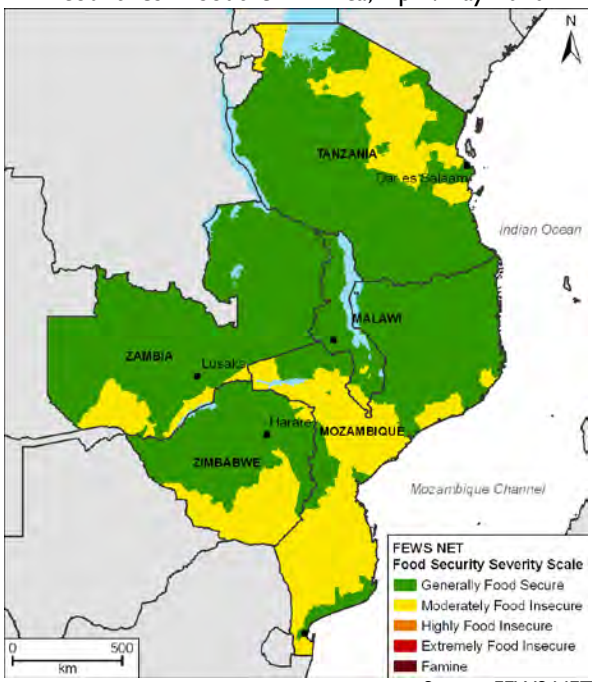
Current food security conditions

Monitoring and assessment reports indicate a general improvement in food security across most of the region, coinciding with the end of the hunger season (March/April). Food supplies have improved as seasonal crops and early maize harvests become increasingly available on farm and local markets. Food security has been particularly enhanced in areas where crop production benefited from favorable rainfall performance, improved access and uptake of inputs, and where minimal exposure to production shocks was experienced. Increased on-farm food availability has eased pressure on local market supplies and prices have stabilized, and in most cases, have begun dropping much earlier than the typical May/June period.

While in general the current food security situation is progressively improving, there remain localized areas of moderate food insecurity in almost all countries in the region. The situation is represented by the conditions in the five FEWS NET countries where more detailed information exists to enable severity mapping (Figure 1). Reasons for a lack of improvement include: effects of the December/January prolonged dry spells and/or the February/March floods, which have delayed the availability of early foods, forcing households to still rely on local markets and/or food handouts from on-going assistance programs. Secondly; some affected areas, such as those in southern Malawi (the Lower Shire Livelihood Zone), the semi-arid districts in south and central Mozambique, parts of Zimbabwe, southern and western Zambia, and the northern and north eastern pastoral areas of Tanzania, are facing two to three consecutive years of poor harvests due to erratic rainfall, drought, and/or flooding.

Figure 1. Current food security conditions in FEWS NET countries in Southern Africa, April/May 2010



Source: FEWS NET

Many vulnerable households in these areas have been receiving food assistance which has helped mitigate food insecurity. Resources for this assistance have recently improved, especially in Zimbabwe where despite the much larger case load of beneficiaries, available food commodities from the World Food Program (WFP) as well as the parallel pipeline program run by Consortium for the Southern Africa Food Emergency (C-SAFE), indicate a comfortable balance for the upcoming six months. It is only in Mozambique that under-resourcing remains a serious concern. Here, of the 460,000 people identified as food insecure in the February assessment of the Technical Secretariat for Food Security and Nutrition / Vulnerability Assessment Group (SETSAN/GAV), only 175,000 people are currently receiving assistance from WFP. Current WFP Mozambique pipeline data indicates a total commodity shortfall of close to 50,000 MT in the period of April – September 2010. Urgent action is required here to secure additional donor resources and to immediately step up food distribution to all targeted beneficiaries in order to avert prolonged food insecurity conditions.

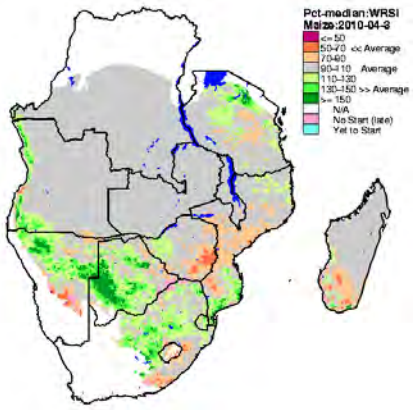
Seasonal progress and harvest expectations

Crop and Livestock Conditions

Although the April rains in the central parts of the region have been good for pasture re-growth, they have led to concerns about the impact on harvests. However, for the most part, field reports indicate that the rains have been more beneficial than detrimental. Although the rainfall season should be tailing off in most areas, the late rains have been a welcome relief, particularly in central and southern Mozambique where extensive replanting took place following the December/January dry spell. As a result, an extended rainfall season was needed for the replanted crops to reach maturity.

The crop-specific water requirement satisfaction index (WRSI) estimates the extent to which rainfall performance throughout the growing season affects cereal harvests. As depicted in Figure 2, areas showing below-normal WRSI include central and southern Mozambique, southern and eastern Zimbabwe, central Tanzania, and southern Madagascar. Cereal crops in some of these areas are likely to have their harvests negatively affected by dryness which occurred during the growing season. In contrast, the WRSI model suggests that areas such as central South Africa and parts of northern Namibia, among others, experienced better-than-usual soil moisture conditions, and this may lead to above average harvests in some of these areas. It should be noted that the WRSI is a modeled product incorporating several assumptions, and any interpretations should be applied in the context of observed field conditions and on-the-ground information.

Figure 2: Water Requirement Satisfaction Index (WRSI) as of 30 April 2010



Source: *USGS/FEWSNET*

Harvest Prospects

South Africa, Malawi, Mozambique, Tanzania, and Zambia are anticipating average to above-average national harvests. This level of production, which in many cases is similar to, or above, last year's levels, has been achieved despite excessive rains and floods, mid-season dry spells, and input shortages in some areas, reducing what could have been bumper harvests. Although official crop estimates have not yet been released in most countries, field reports support these projections.

The largest cereal harvest is expected from South Africa (Table 1), due mainly to favorable growing conditions in the main maize growing areas of the country. The latest production forecast (as of 22 April) estimates a South African maize crop of 13.71 million MT, 9 percent above last season, and 33 percent above the five-year average of 10.29 million MT. The bulk of the rest of region's maize comes from Malawi, Tanzania, Mozambique, and Zambia – countries which in good years produce more than sufficient quantities to meet their own domestic requirements leaving sizable exportable surpluses. In the past five years, these four countries have produced over 90% of the harvest from the "other SADC" category in Table 1, and in all four, more favorable prospects were dampened in part by localized weather shocks as described above. By the end of April, only Malawi had issued a forecast based on the second round estimates suggesting a total maize crop of 3.20 million MT. This figure is 15 percent below last year's bumper harvest of 3.77 million MT on account of the more severe and more widespread effects of drought and flooding that were experienced in the southern area of the country. Qualitative estimates from Mozambique, Tanzania, and Zambia suggest that production levels are better than, or the same as, those achieved last year. The five percent decline in maize production from the "other SADC" category in Table 1 is therefore affected by the reduction in Malawi.

Table 1. SADC regional preliminary production forecasts: 2009/10 compared to 2008/09 ('000 MT)

	Maize			All Cereals		
	08/09	09/10	% Change	08/09	09/10	% Change
South Africa	12,567	13,708	9.1	14,812	15,655	5.7
Other SADC*	13,655	12,929	-5.3	17,232	16,429	-4.7
TOTAL	**26,222**	**26,637**	**1.6**	**32,044**	**32,084**	**0.1**

* Excludes South Africa, DRC and Madagascar.

Source: SADC National Early Warning Units and Central Statistics Office

Elsewhere in the region, and especially in the BLNS countries (Botswana, Lesotho, Namibia and Swaziland), current projections also suggest that harvests will improve compared to last year, especially in areas where the shocks of drought/dry spells and flooding had no or minimal impact. Similarly, production prospects in Zimbabwe are expected to be considerably better than last season. The Government's second round of crop estimates suggest an increase of seven percent in the maize harvest, up from 1.24 million MT last year to 1.33 million MT this season. This represents a 56 percent increase over the past five-year average estimated at 850,000 MT.

Table 2. Early warning for FEWS NET countries

Country	Main Issues
Malawi	Crop production prospects are above average in most parts of Malawi, except in the Lower Shire Valley (Chikwawa and Nsanje districts), where prolonged mid-season dry spells caused widespread crop failure; affecting an estimated 147,000 households. Cereal harvests in these areas are expected to last only up to June instead of the normal October/November with the worst-affected households harvesting almost nothing, and some having already turned to markets to access food. However, limited purchasing power is hampering adequate access. The MVAC assessment findings, coupled with the release of official crop estimates will indicate the extent of projected food supply shortages in affected areas.
Zambia	Households in the extreme south of Zambia are facing reduced crop yields due to both drought and flood impact in the December to February period. Limited and/or delayed availability of green harvests has extended the hunger period; while reduced main season harvests mean poorer households could have difficulty accessing food as early as August. While assessments to identify vulnerable households are still underway, flood victims did receive immediate assistance, including temporary relocation to safer areas.
Zimbabwe	Though overall food production is estimated to have improved this season, it remains insufficient to meet national requirements. The latest assessment reports indicate that while in the more productive northern areas, rural households have produced in excess of 10 months of food requirements; in the drier south (where drought impacts were worst) harvests are only sufficient to meet two to four months of requirements. A joint FAO/WFP CFSAM scheduled for May will provide further information that will guide planning and response strategies targeted at affected populations.
Mozambique	Households affected by the combined shocks of drought and floods in the south and central parts of the country are facing food shortages as a result of crop production failures. Most of these households have faced recurrent shocks that have eroded livelihoods and coping capacities. Areas of concern include the interior of Gaza and Inhambane provinces, parts of Maputo province, and parts of the Zambezi basin. WFP's available pipeline covers only 38 percent of the total case load that has been identified. The SETSAN/GAV assessment planned for June 20101 will provided updated figures.
Tanzania	Pockets of moderate food insecurity still exist in parts of Tanzania due to: poor *vuli* and *masika* harvests in bimodal areas and *msimu* harvests in some parts of unimodal areas during the past 2008/09 season; effects of below-normal rains in the central zone areas for the 2009/10 season; and the continued spread of crop diseases and pests around the Lake Victoria zone. Affected areas include: the northern and southern maasai pastoral livelihood zones; parts of the Singida-Dodoma sorghum, bulrush millet, sunflower, and livestock livelihood zone; parts of the Kagera- Kigoma-Mara banana, coffee, and beans livelihood zone; and the eastern coast area of the Bagamoyo-Kibaha Midland cassava, cashew and maize livelihood zone.

Most-likely regional food security scenario

The most likely food security scenario for the SADC region between April and September should see a continuation of the current generally food secure conditions in most areas, except where shocks have compromised food availability, access, and/or utilization. The outlook for generally stable food security in the region is projected based on the forecasts of 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. Preliminary regional maize supply/demand projections for the 2010/11 marketing year suggest that maize availability (boosted by the bumper harvests and large carryover stocks from South Africa) will meet the region's needs and will leave a surplus that could be exported outside the region. The currently low maize prices on the South African Futures Exchange (SAFEX) bodes well for grain deficit nations who will be able to get most of their imports at favorable prices, thus enhancing access for many of the poorer households especially during the Outlook period.

At the sub-national level, most rural households (including the resource poor in high production areas) will have access to their own food production until the onset of the next hunger season (October/November). Even in the structurally grain deficit BLNS countries, May 2010 harvests are expected to meet farming household 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 (see Price Annex).

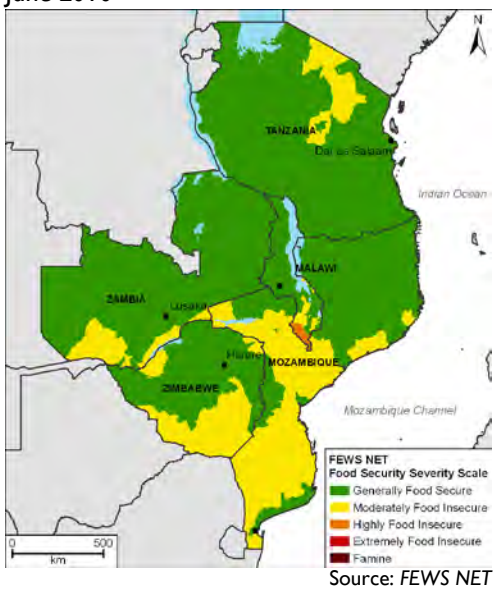
The exception will be among households in the areas that are facing food shortages as a result of poor harvest prospects. These households are currently assessed to be moderately food insecure, but it is not anticipated that these conditions will deteriorate further over the outlook period, due to expectations 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.

Figures 3 and 4 and Table 3 summarize the most likely scenarios during this outlook period.

Table 3. Early warning for FEWS NET countries

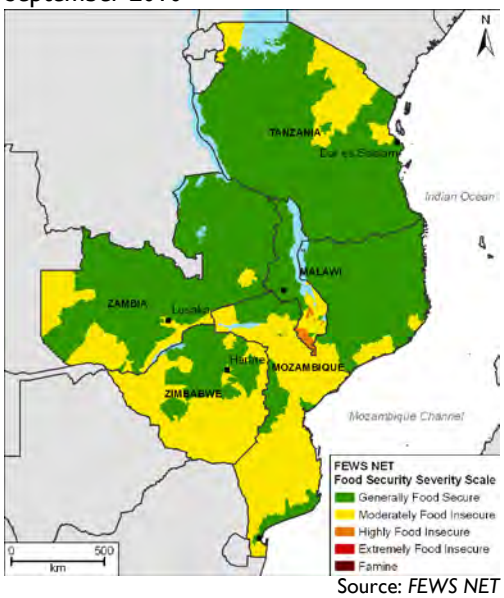
Country	Most Likely Scenarios
Malawi	The FEWS NET estimates that over the outlook period, food insecurity will extend beyond Chikhwawa and Nsanje to other southern districts. The current food distribution program for the 147,000 targeted beneficiaries in the Lower Shire Valley has been extended to May 2010 pending release of updated MVAC results. FEWS NET estimates that numbers could increase to 500,000 by June, and to as much as 1.5 million by March 2011.
Mozambique	Throughout the outlook period, food assistance will be required for the 460,000 food insecure people identified by the SETSAN/GAV. From April to June 2010, moderate levels of food insecurity will continue in the semi-arid central and southern areas. Conditions may begin to deteriorate as early as June in the semi-arid zones, when household food stocks (from the current meager harvest) begin to be depleted. In the July to September period, although moderate food insecurity will continue, food insecurity conditions are not expected to worsen due to contributions from second season production in the south and center.
Zambia	While Zambia expects above average 2010 harvests, moderate levels of food insecurity are expected to persist in localized areas, especially the flood and drought prone areas in the extreme south of the country where food deficits are projected. The number of affected households, and the extent of assistance required will be determined when results of the ongoing VAC assessments are released.
Zimbabwe	Latest assessment reports indicate that in the more productive northern areas, households have produced in excess of 10 months of food requirements; while in the drier south (where drought impacts were worst) harvests are only sufficient to meet two to four months of requirements. These households could therefore face access problems as early as July, particularly as the drought has also reduced income earning opportunities associated with the harvesting. Over the outlook period, the numbers in need of food assistance will therefore increase, as available own-produced food gets depleted.
Tanzania	In the April to June period, food insecurity levels in the areas identified as facing moderate levels of food insecurity are expected to decline as households benefit from harvests. However from July to September, poorer households, especially those without sources of agricultural or non-agricultural income will have limited access to food and will begin to slip back into moderate food insecurity. Food assistance will most likely be required for these households to mitigate these conditions.

Figure 3. Most likely food security outcomes in FEWS NET countries, April to June 2010



Source: *FEWS NET*

Figure 4. Most likely food security outcomes in FEWS NET countries, July to September 2010

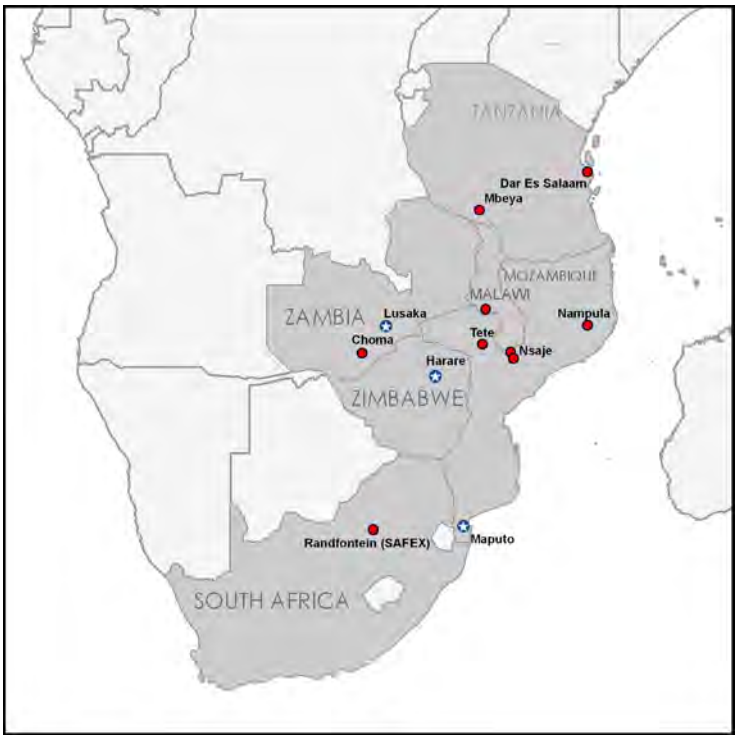


Source: *FEWS NET*

Table 4. Events which could affect the April to 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	Above normal rains continue beyond May 2010	Dampened yields as a result of cob rot and spoilage from excessive moisture leading to poor harvests	Unlikely	Rainfall, crop forecasts and food prices
	Significantly reduced regional cereal harvests compared to last year	Reduced food supplies leading to food shortages, rising staple food prices, and limited food access for households in low producing areas	Unlikely	Crop estimates and food prices
Drought and flood-affected areas across the SADC region	Prices of maize and other main staples remain high and begin to rise early	Higher food prices limit access for market dependant households especially the most vulnerable	Unlikely	Food prices
Riverine areas across the region where second season planting is practiced	Reduced off-season planting due to inadequate moisture	Reduced food availability could increase the number of poorer households requiring assistance during the hunger season	Highly unlikely	Rainfall, off-season crop conditions
South Africa	Sudden increase in the domestic price of maize	Higher prices may cause current declining food inflation rates to begin to rise in South Africa and the neighboring BLNS countries	Unlikely	Maize price on SAFEX, food prices, and CPI data
Malawi (Lower Shire Livelihood Zone)	Adequate and timely food distribution to targeted households	Adequate food intake improves food security for about 1.5 million people in the affected districts	Unlikely	Humanitarian response reports
Tanzania (bimodal zone)	Early cessation of *masika* rains (northern pastoral bimodal areas)	Current improvements in food security conditions will be reversed and begin to deteriorate	Unlikely	Rainfall and food prices
	Above normal and extended *masika* rains (eastern coastal bimodal areas)	Increased rice production improves food access, market availability, and incomes		
Mozambique (semi-arid areas of southern and central regions)	Above average crop harvest coupled with reduced and falling food prices	Improved food access and food security conditions leading to reduced commercial and food aid import requirements	Unlikely	Harvest estimates and food prices
Zimbabwe	Collapse of Global Political Agreement	Instability leads to return to economic decline and reverses current improvements in food security conditions countrywide	Unlikely	Political developments and pronounce-ments
	Restrictions on private trade in staple foods restored	Availability of staple foods on local markets declines drastically leading to spiking food prices and limiting household access to food	Unlikely	Government policy pronounce-ments

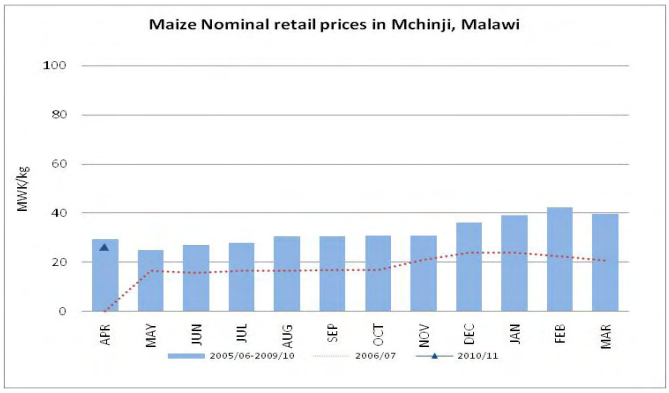
* Probability levels	Description
Unlikely	Could occur in the time period if conditions changed moderately
Very unlikely	Could occur in the time period if conditions changed significantly

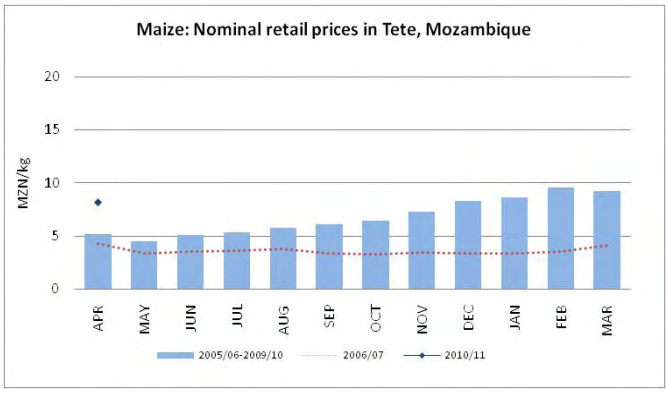


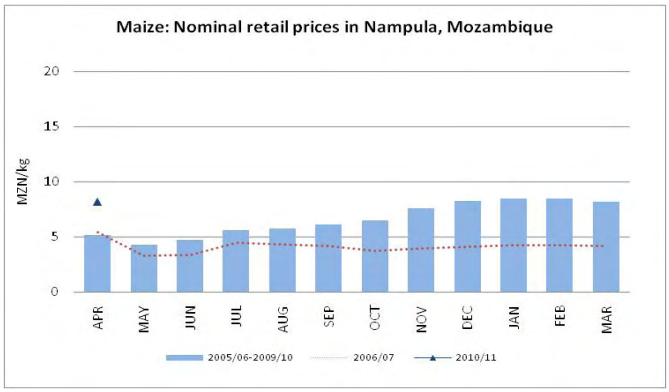
Monthly prices are supplied by FEWS NET enumerators, local government agencies, market information systems, UN agencies, NGOs, and other network and private sector partners.

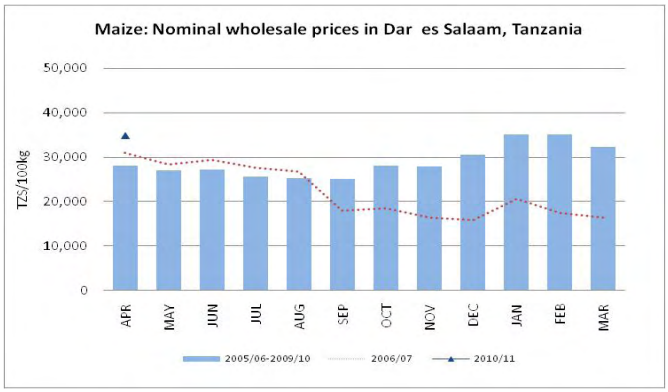
Most households in Southern Africa depend on maize as their main source of food and energy, given the high volumes and ease with which it is produced. Alternative food crops that are consumed as substitutes include rice, wheat, sorghum, millet, and tubers such as cassava and potatoes. Consumption of 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.

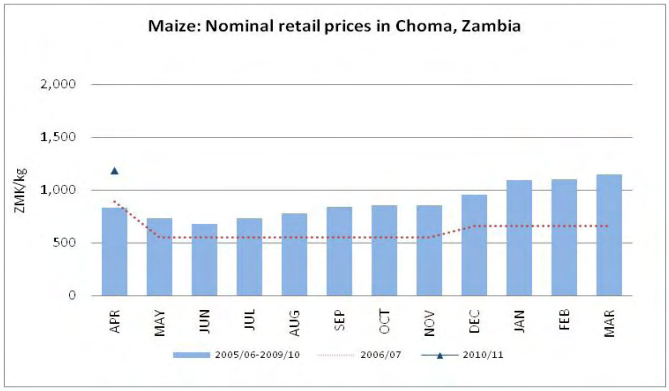
MAIZE: The markets below represent the major markets — both production and consumption— within each country in the region in addition to the SAFEX spot market prices in South Africa.

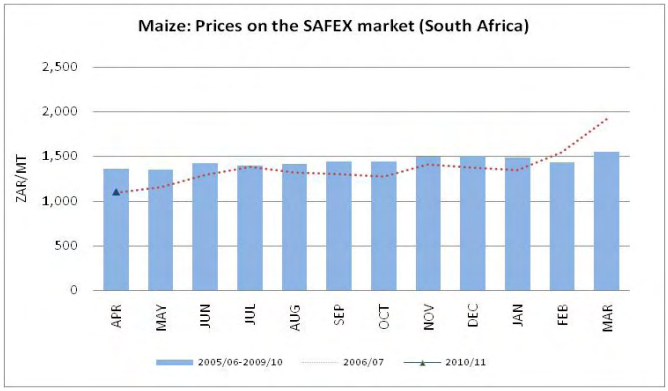


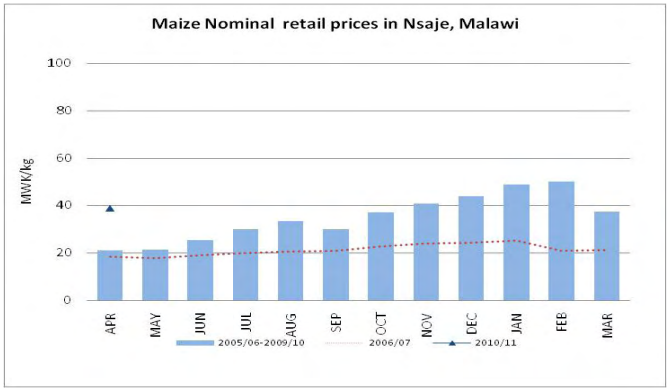


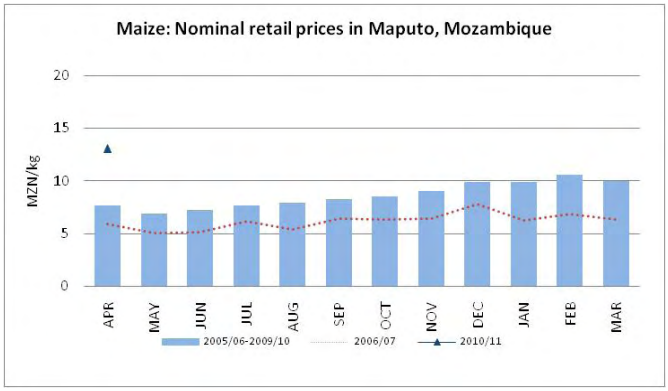

Maize: Nominal retail prices in Nampula, Mozambique
MZN/kg
20
15
10
5
0
APR MAY JUN JUL AUG SEP OCT NOV DEC JAN FEB MAR
2005/06-2009/10
2006/07
2010/11


Maize: Nominal wholesale prices 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
2005/06-2009/10
2006/07
2010/11

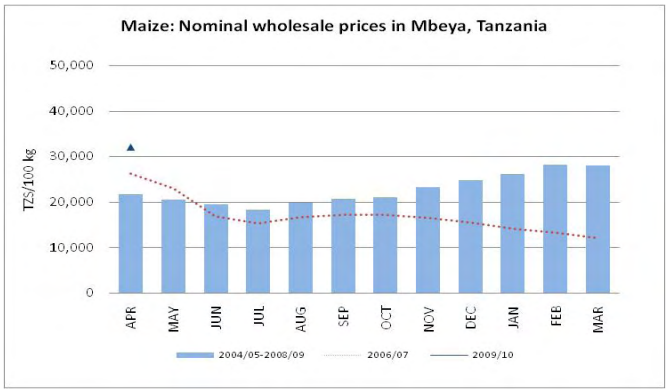

Maize: Nominal retail prices in Choma, Zambia
ZMK/kg
2,000
1,500
1,000
500
0
APR MAY JUN JUL AUG SEP OCT NOV DEC JAN FEB MAR
2005/06-2009/10
2006/07
2010/11

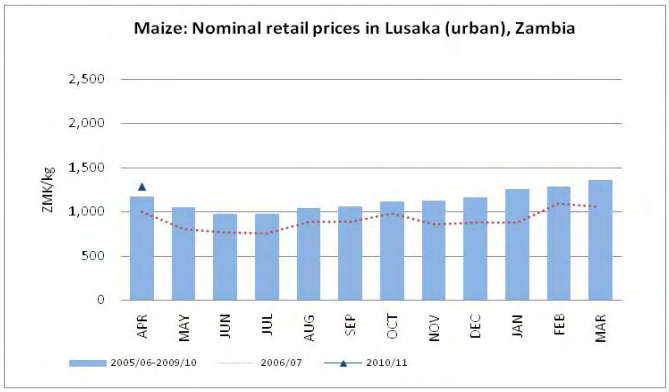

Maize: Prices on the SAFEX market (South Africa)
ZAR/MT
2,500
2,000
1,500
1,000
500
0
APR MAY JUN JUL AUG SEP OCT NOV DEC JAN FEB MAR
2005/06-2009/10
2006/07
2010/11


Maize Nominal retail prices in Nsaje, Malawi
MWK/kg
100
80
60
40
20
0
APR MAY JUN JUL AUG SEP OCT NOV DEC JAN FEB MAR
2005/06-2009/10
2006/07
2010/11

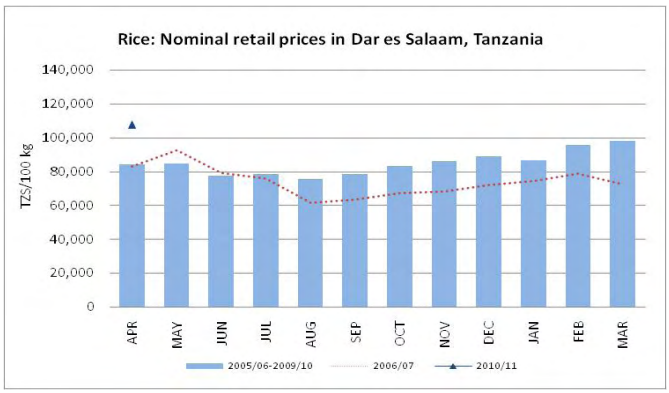

Maize: Nominal retail prices in Maputo, Mozambique
MZN/kg
20
15
10
5
0
APR MAY JUN JUL AUG SEP OCT NOV DEC JAN FEB MAR
2005/06-2009/10
2006/07
2010/11

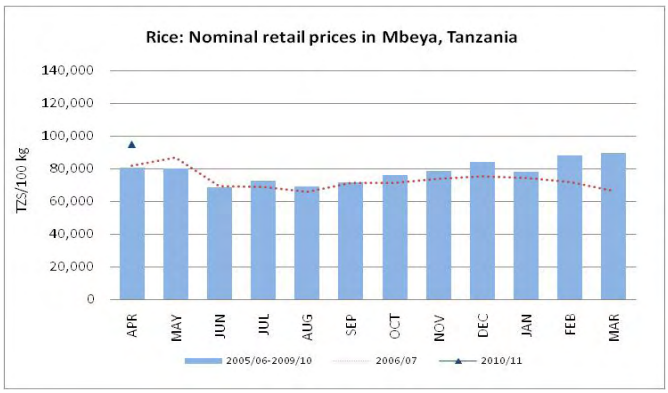
Maize: Nominal retail prices in Harare, Zimbabwe
USD/kg
1.00
0.80
0.60
0.40
0.20
0.00
APR MAY JUN JUL AUG SEP OCT NOV DEC JAN FEB MAR
2005/06-2009/10
2006/07
2010/11

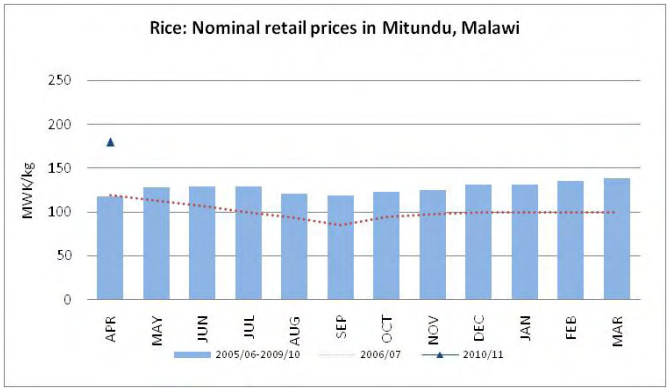

Maize: Nominal wholesale prices in Mbeya, Tanzania
TZS/100 kg
50,000
40,000
30,000
20,000
10,000
0
APR MAY JUN JUL AUG SEP OCT NOV DEC JAN FEB MAR
2004/05-2008/09
2006/07
2009/10

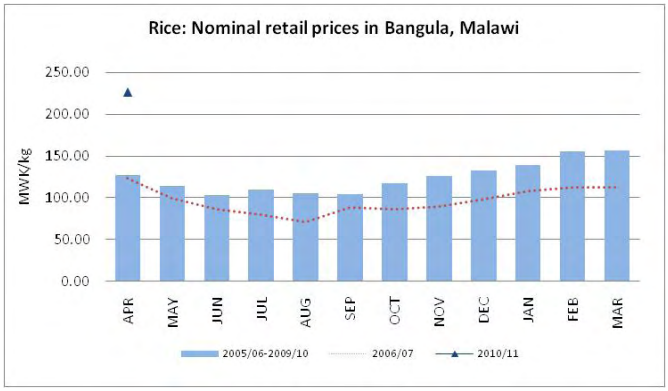


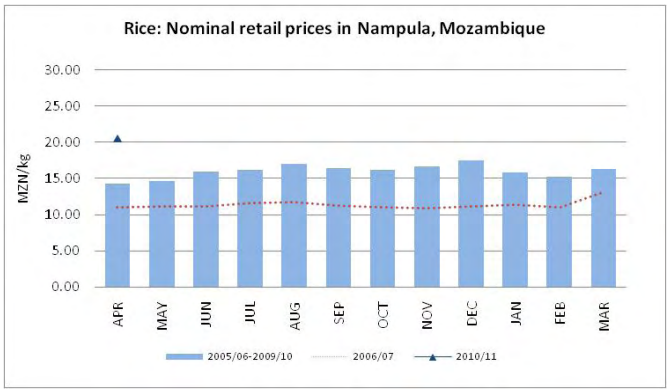
RICE: The markets below represent the major markets — both production and consumption— within each country in the region.

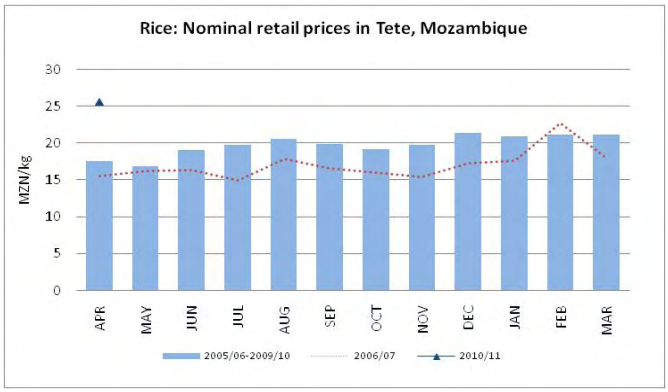


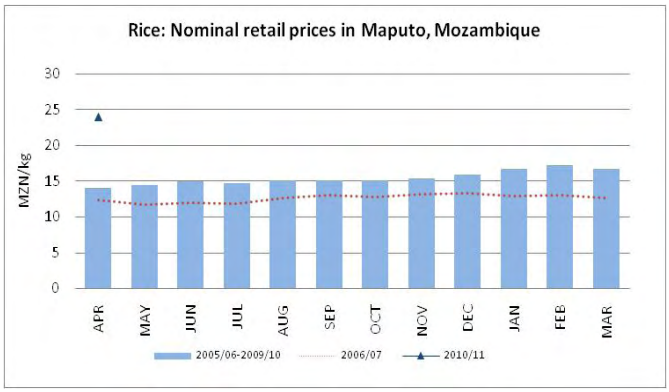
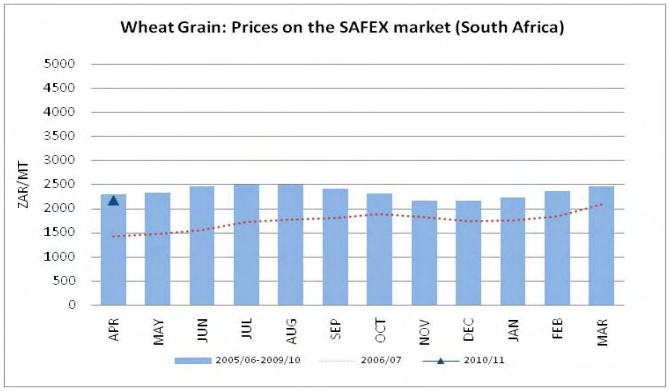












WHEAT GRAIN: Wheat prices in South Africa indicate trends in domestic, regional, and international wheat prices. Wheat grain prices on SAFEX are indicative of prices that countries face as they import these commodities. These prices are comparable with those faced by neighboring countries including Lesotho,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