SOUTHERN AFRICA Food Security Outlook March to June 2012

Minimal acute food insecurity across the region

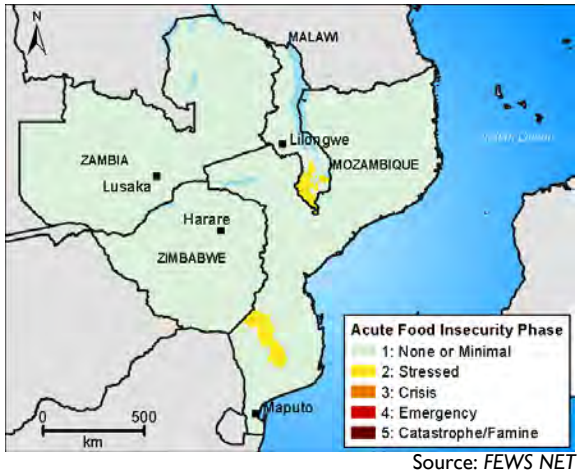
- Currently, most parts of the region remain generally food secure, despite the current peak of the lean season. The green harvest and targeted food distribution programs are helping to ameliorate acute food insecurity in areas facing food shortages due to poor harvests during the last agricultural production season.

- A mid-season dry spell affected much of the southern half of the region from early February into early March. The most affected areas include eastern Botswana, Lesotho, South Africa, southern Mozambique, southern Malawi, and southern Zimbabwe. Reports indicate that impacts have negatively affected crop yields, resulting in reduced harvest expectations.

- For most parts, conditions over the outlook period are expected to remain satisfactory. In those areas where Stressed (IPC Phase 2) food insecurity had been assessed for the period up to March 2012, conditions will also improve, aided by the availability of food from the green harvest and the main season harvest expected to begin at the end of March. However, poor rainfall in some areas will extend the lean season, and reduced income earning opportunities due to less harvesting and sales of green harvests will increase the size of the acutely food insecure population. Affected areas, especially in southern Malawi, need to be closely monitored, and adequate mitigatory measures should be taken.

- The prospects of average to below-average yields as a result of unfavorable crop growing conditions in the current agricultural season (especially in the south) mean that availability in the next season is likely to be tighter compared to the past two to four years. Food prices are therefore likely to remain above last year's prices and the five-year average.

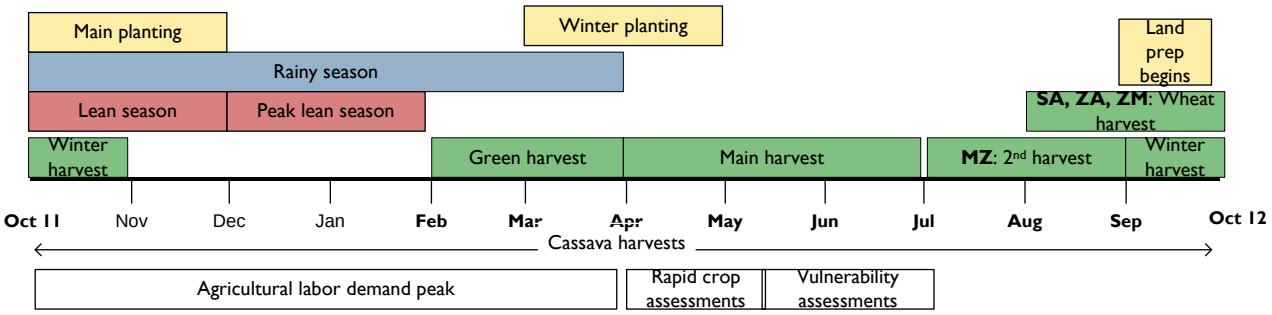
Figure 1. Current food security outcomes: Malawi, Mozambique, Zambia and Zimbabwe; March 2012



Source: *FEWS NET*

For more information on the IPC Acute Food Insecurity Reference Table, please see: www.fews.net/FoodInsecurityScale

Seasonal calendar and critical events timeline



Source: *FEWS NET*

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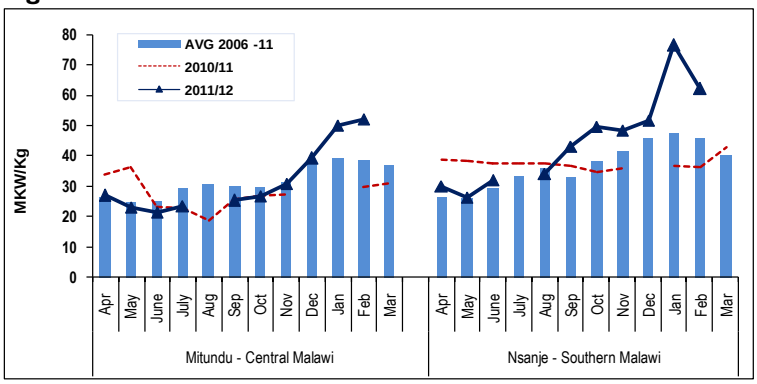
Current food security conditions

The food security situation has remained relatively stable across most of the region, with the majority of staple food commodities readily available on local markets, despite the current peak of the lean season. This is attributable to the good harvests held by the majority of rural households from the last cropping cycle. A significant number of rural households had more stocks on hand, which enabled them to consume own produced food slightly longer than normal. In general, many households are augmenting available food stocks though typical lean season livelihood strategies, which include switching of expenditures from non-food items to staple foods, seeking casual labor (especially for weeding and replanting where conditions permit), and consumption of wild foods, among others. As the lean season continues, an increasing number of households across the region are now purchasing food from markets, as many have almost depleted their own produced food stocks through consumption and/or sales. Adequate on-farm and market supplies have thus far contributed to relatively stable food prices, but rising demand is putting upward pressure on prices (especially since the start of the hunger season in November/December).

Over most parts of the region, isolated pockets of food insecurity exist in areas that experienced adverse agro-climatic/ crop growing conditions, which led to poor yields and sometimes complete crop failure last season. This includes parts of Lesotho, southern Malawi, central and southern Mozambique, central Tanzania, and eastern and southwestern Zimbabwe. Some of these areas have suffered the same shocks for successive years, rendering their livelihoods fragile and highly vulnerable to weather-related shocks. Most affected households, especially the poor and very poor, are struggling to access food on local markets due to rising food prices and limited income-earning opportunities from normal sources.

For example, in southern **Malawi**, which was affected by a mid-season drought last cropping season, the food insecure population at the peak lean season is estimated to have increased by 150,000, mainly as a result of the anomalous price increases (especially in affected districts), and this year's poor rainfall performance, which has led to a lengthening of the lean period. Although most recent field reports indicate an improving situation as a result of the current food distribution program by government and its partners, the Malawi Vulnerability Assessment Committee (MVAC) is now recommending that it be extended for another two months to April 2012 and include the additional 150,000 people affected. Apart from the needs identified by MVAC, flooding in January in southern Malawi, particularly in Nsanje district, affected over 6,000 households, which are still receiving emergency assistance through the Department of Disaster affairs and its humanitarian partners.

Figure 2. Maize Retail Prices in selected markets – Malawi



Source: Ministry of Agriculture and FEWS NET, Malawi

In **Mozambique**, SETSAN/GAV in December reported that some 245,000 people remain acutely food insecure and require humanitarian assistance until March 2012 due mainly to poor 2010/11 rainfall performance in the semi-arid areas. The report also indicates that 2011 second season production contributed substantially to increased food access and therefore to better food security among many poor households than was expected when the August assessment was carried out. Only Massangena and Chigubo districts (yellow areas in Figure 1) are classified as stressed (IPC Phase 2) due to the impact of 2010/11 crop production deficits. In addition to the programs targeted at populations facing food deficits from last season's crop failure, acute food insecurity (and other emergency needs) in flooded areas along the Limpopo and Zambezi Basins affecting over 33,000 households is being dealt with by the National Institute of Disaster Management (INGC) and partners.

In **Tanzania**, the latest update from the Ministry of Agriculture and Food Security indicates that food security conditions among the 1,124,717 people identified as requiring assistance in October 2011 have improved as a result of ongoing food distributions as well as the recently harvested *vuli* crop, which has been fair to average in most bimodal areas. The

Government released 26,393 MT of maize, of which 2,639 MT were distributed freely to 112,471 destitute people, while the remaining 23,754 MT was sold at subsidized prices to the rest of those identified as acutely food insecure.

In **Zimbabwe**, the Vulnerability Assessment Committee (ZimVac) annual assessment in July estimated a total of 1.4 million people to be food insecure at the peak of the lean season (January through mid-February 2012); of these, one million people are in rural areas. However, as no major production-related shocks occurred over the last agricultural season, findings of the assessment indicate that a larger portion of the assessed food insecurity is chronic food insecurity; acute food insecurity of any severity is low. Food assistance from the World Food Program (WFP) and the Government is addressing a significant proportion of acute food insecurity in rural areas; and consequently the whole country can be classified as falling into the IPC Phase 1- minimal or no acute food insecurity. However, some levels of chronic food insecurity remain unassisted.

Food supplies – imports and exports

At the national level, most major maize-producing countries (Malawi, Mozambique, South Africa, Tanzania, and Zambia) still have adequate national maize stocks. Following a very aggressive export program over the 2011/12 marketing season, South Africa's stocks are at unprecedented low levels, and the country has had to import both white and yellow maize for its domestic market. The South Africa Grain Information Service (SAGIS) reported that by March 2, 2012 a total of 2,296,000 MT of maize had been shipped, 79 percent of which went overseas. Current projections indicate that the country will have only 474,000 MT of closing stock for the 2011/12 marketing season.

Zambia's Food Reserve Agency (FRA) purchased over 1.7 million MT of maize grain from farmers; which together with an estimated 300,000 MT of carryover stocks from the previous seasons brought their stock levels to about 2 million MT at the end of October, putting pressure on the already limited grain storage space. To reduce maize losses, the Government directed the Agency to sell 1,067,000 MT before the 2011/2012 crop comes on the market in May/June. As of the end of January, 444,600 MT had been disposed of through exports and local sales. It is unlikely that the FRA will sell more than 500,000 MT by the end of this season, implying a carryover stock of more than one million MT into the 2012/13 marketing season.

Table 1. SADC cereal imports and exports progress ('000MT)
Balance sheets updated 2 March 2012

	Maize	Wheat	Rice	Sorg/Mill	TOTAL
Availability	30,903	3,061	2,350	2,409	38,722
Demand	27,487	5,581	2,708	3,187	38,963
Deficit/Surplus	**3,416**	**-2,520**	**-358**	**-778**	**-240**
Planned Imports	976	2,244	353	78	3,650
Planned exports	4,155	353	12	29	4,548
Uncovered Gap/Surplus	**-495**	**-629**	**-17**	**-729**	**-1,138**
Imports Received	783	1,108	49	1	1,941
Exports shipped	2,699	145	12	0	2,856
Imports Progress (in %)	**80**	**49**	**14**	**1**	**53**
Exports Progress (in %)	**65**	**41**	**100**	**0**	**63**

Excludes DRC and Madagascar.

Source: National Early Warning Units and FEWS NET

In December 2011, the strategic Grain Reserve facility held by the Malawi National Food Reserve Agency (NFRA) was reported at 135,000 MT, while Agricultural Development and Marketing Corporation (ADMARC) stocks stood at 20,000 MT. This, together with significant levels of trader held stocks (following the export embargo), means the country enters the 2012/13 consumption season with comfortable carryover stocks, which will help buffer the expected reduction in overall maize harvests this season.

National-level availability in structurally deficit Botswana, Lesotho, Namibia, and Swaziland (BLNS) has also been reported satisfactory due to adequate import deliveries (especially of maize from South Africa). However, rising maize prices in South Africa have contributed to steeper increases in food inflation rates in these countries, exacerbating food access problems for many vulnerable households. Although the overall maize balance for the region (Table 1) shows a positive demand/supply balance (with and without stock replenishment), the maize-deficit SADC countries have a combined maize import requirement/import plans totaling 976,000 MT. Of this amount, 783,000 MT (or 80 percent) had been delivered by the end of February. With only one month until the end of the marketing year, outstanding import commitments need to be fast-tracked to provide local markets with the needed supplies.

Markets and prices

Food commodity prices have remained relatively stable (though rising seasonally) in many of the monitored markets, although they are higher than both last year and the five-year average. The exception is Zambia, where due to the large maize surpluses, prices at most markets have remained stable, trending below the five-year average and last year's price levels. In February, some markets even recorded price drops as the FRA intensified sales on local markets to reduce prevailing high stock levels. In general, throughout the region, food price levels remain higher than the five-year average due to higher agricultural input prices last cropping season and increasing transport and fuel prices. Prices are expected to continue rising until the new harvest begins in March/April. However, in areas facing dry spells and yield reductions in the current season, price increases will likely be sustained much longer due to delayed and reduced green harvests, which normally augment food supplies toward the end of the lean season in February/March.

Where food shortages exist due to last year's poor harvests, prices are much higher and are rising faster. Price spikes were particularly significant in southern Malawi, where effects of food shortages were exacerbated by fuel and foreign currency shortages and a devaluation of the local currency. However, food aid interventions (and the ban on exports) have helped mitigate the steep spikes, facilitating better access for most households, especially the poor and very poor. The prospects of average to below-average yields as a result of unfavorable crop growing conditions in the current agricultural season (especially in the south once again) mean that availability in the next season is likely to be tighter compared to the past two to four years. Food prices are therefore likely to remain above last year's prices and the average.

Seasonal progress

Rainfall from early February into early March of 2012 was significantly below average in much of the southern half of the region (Figure 3, brown and yellow colors). Affected areas include eastern Botswana, Lesotho, South Africa and southern Zimbabwe. Southern Malawi was also impacted by the low rainfall in this period although the dry spell was not as severe and as widespread. Although the dry spell also affected southern Mozambique, reports indicate that most crops were planted early, and had already reached maturity, thereby minimizing the impact on crops, except for late planted crops.

The WRSI shows areas where planted crops were potentially most affected by the dry spell (Figure 4, red and brown colors), including South Africa, southern Zimbabwe and eastern Botswana. As more than 70 percent of the total rainfall normally falls by end of February, not much more rainfall (climatologically) is expected before the end of the season. In addition, the latest forecast by the SADC Climate Services Centre (Figure 5) suggests that normal to below-normal rainfall can be expected in the March to May period. As such, high rainfall amounts and extended periods of rainfall activity that could change the cropping situation, especially for areas where late planting occurred, are unlikely to occur.

Crop condition and yield prospects

Field reports indicate that **Lesotho** is expecting poor harvests this season, after dry spells affected the first part of the growing season, resulting in reductions in the area planted to maize and sorghum, as well as late planting of crops in many areas. The late planted crop – which has not yet reached maturity, faces an increased risk of frost damage. Some crops in the lowlands were also affected by water-logging due to heavy rains in February. Reported dry conditions in parts of southern and central **Malawi** are likely to result in reduced crop yields in some affected areas, especially in the south. In the central and northern parts of the country, near-normal production is expected. Crops in northern **Mozambique** are reported to be in good condition, in the vegetative and maturity stage, and good production is expected in the northern parts of the country if good rains continue. In the central parts of Mozambique, crops are in the maturity stage, and some crops are already being harvested. In the south, harvesting of early planted crops has begun. However, lower crop yields are expected in the arid and semi-arid parts of the country, where replanting occurred due to irregular rainfall. Several tropical storms and cyclones have passed near or through parts of Mozambique this season, with the latest, Tropical Storm Irina in early March. Agricultural assessments indicate that close to 42,000 Ha of crop have been lost due to storms and cyclones.

Most parts of **South Africa** have thus far experienced below-average rainfall for much of the season. The impact of the dryness was partially ameliorated by good soil moisture reserve built up from last season, but even this had been significantly depleted in many areas. Maize crops in many areas are still in the vegetative and flowering stage as result of the low rainfall/ delayed onset. For these late planted crops, rainfall will be needed until April or May in some areas, in

order for the crops to reach maturity. A commercial production estimate of 11.7 million MT of maize was given in late February, but this figure is likely to be reduced significantly due to the recent dryness extending into March. The current estimate comes on the backdrop of depleted South African maize stocks, together with export commitments which are still being fulfilled.

In **Swaziland**, most of the maize crop is reported to be at maturity stage, with some crop already in the drying and harvesting phase. The crop in the Highveld, a major maize growing area, is in good condition. Nonetheless, an erratic start of season, constrained access to inputs and draft power has led to reduced area planted and an early forecast of a maize harvest that is approximately 25 percent below last year's level. The good rains that fell in the central unimodal areas of **Tanzania** between early February and early March were beneficial to crop development. Most crops, including maize, paddy, wheat, sorghum and cotton, are reported to be in good condition, with the maize crop ranging between emergence and flowering stage. Good rains also fell in the bimodal areas, facilitating land preparation and planting activities for the second season (*masika)* crops.

Zambia has experienced a good season in most areas, although seasonal rainfall has been erratic and below normal in southern areas. However, the maize crop is reported to be at the grain filling stage in most parts of the country, and production is expected to be fair to good, though potentially lower than last year's. In **Zimbabwe**, the major crop-producing areas of the country have had average rainfall performance, and crops in these areas are reported to be in fair to good condition. However, extended dryness in the southern half of the country affected crops, resulting in permanent wilting of crops in some areas. Affected areas include parts of Matabeleland North, Midlands, and Manicaland provinces, as well as most of Masvingo and Matabeleland South provinces. These areas are likely to have below-average crop performance, and some localized crop failure is already reported. Compared to last season, the dry (marginal production) southern districts are expected to realize poorer crop yields, which is likely reduce overall national harvest expectations.

Most likely food security scenario, March to June 2012

Rainfall performance plays a critical role in determining the food security outlook of the region for any given period. In southern Africa, most households rely on rain-fed agriculture as a source of both food and income. Many of them grow maize as the main staple food and keep a few livestock to supplement both food and income, but only when unexpected needs occur. Own production is also supported through typical livelihood strategies that households in different areas employ to ensure adequate access to food. The rainy season (October – March) throughout most of the region normally starts tailing off from the end of March, meaning that its performance (and impact) on harvest prospects, and hence food availability for the 2011/12 season, will no longer be critical as most of the crop should by now be at maturity stage.

Figure 3. Percentage of average rainfall for Oct 1, 2011 to March 10, 2012

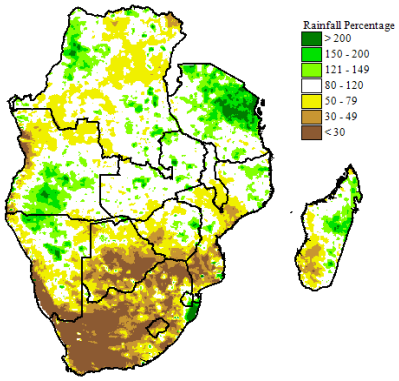
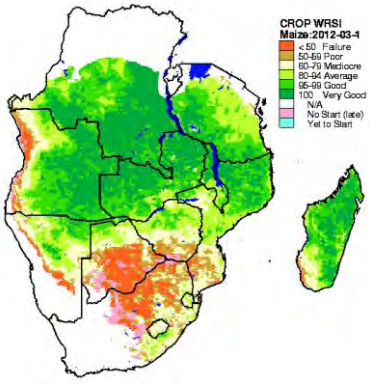
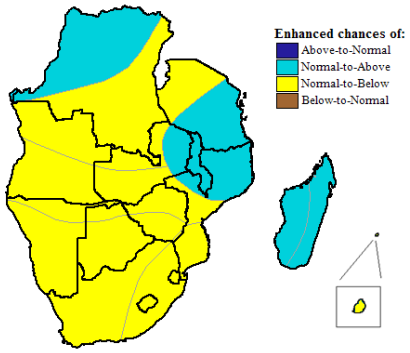


Figure 4. Water Requirements satisfaction index (WRSI) as at 10 March 2012



Source: *USGS/FEWSNET*

Figure 5. Updated Rainfall forecast for March– May 2012



Source: SADC Climate Services Center

In the month of March, food security conditions will remain as described under current conditions above. From April to June — which includes the main season harvest period — food security conditions are expected to be generally stable and satisfactory in areas where rainfall performance has so far been favorable for crop production, and where the February to May rainfall outlook enhances conditions for crop maturity, drying and harvesting. In areas where rainfall performance has been erratic, and is expected to remain poor throughout the season, conditions will improve though remain comparatively poorer than in other areas. Food security will not be critical

over this period, as most households will at least have access to whatever little food they will have harvested. Market-dependent households are also expected to be able to access adequate food from local markets, as prices are expected to decline as the harvest season progresses, until it peaks in June/July.

Where complete crop failure has occurred, conditions could deteriorate rapidly, especially in areas where the previous season's crops also failed. In such areas, critical mitigation measures should be put in place to prevent any further deterioration. Overall, minimal acute food insecurity will be experienced in the region over this period, and an IPC Phase 1 classification is suggested for the region (Figure 6).

Figure 6. Most likely food security outcomes: Malawi, Mozambique, Zambia and Zimbabwe, April – June 2012

Source: *FEWS NET*

For more information on the IPC Acute Food Insecurity Reference Table, please see: www.fews.net/FoodInsecurityScale

Areas of concern - most likely scenario

Flood affected areas (April – June): Most areas that experienced excessive flooding, leading to disruptions of livelihoods and crop failure, have received emergency humanitarian assistance, but many will still require food assistance as they will not realize any harvests this season. Poorer households will be most affected, with little or no income to purchase available foods on the market. Casual labor opportunities (for example for harvesting) have been reduced significantly, as the better-off households have also been affected by the floods. While the crop loss will affect local food availability, especially through reduction of green harvests (and hence extension of lean season), local markets are expected to remain well supplied as traders move newly harvested stocks from surplus production areas. In **Mozambique**, affected areas are located in the lower Limpopo basin including Guijá, Chibuto, Chókwe, Manjacaze and Xai-Xai districts in Gaza province, parts of Maputo province including Magude, Manhiça and Marracuene districts, and parts of Zambézia province; while in **Malawi**, Nsanje district in the south was the most affected by floods. The rapid emergency assessments carried out by disaster authorities, Ministries of Agriculture and their partners in these countries identified a significant number of households requiring immediate food assistance (see current conditions). Measures put in place to mitigate the flood disaster by governments and partners are expected to alleviate food insecurity over this three-month period, but more resources will be required in the future. Overall, these areas will fall into IPC Phase 1 – minimal acute food insecurity.

Drought/extended dry spell affected areas (April - June). Significant portions of the region experienced below-normal rainfall characterized by an erratic pattern and delayed onset which negatively impacted area planted and yield potential. The most affected areas include the Lower Shire Livelihood Zone in southern **Malawi**, southern **Zimbabwe** (including Matabeleland North, Midlands and Manicaland provinces, most of Masvingo and Matabeleland South provinces), and in **Mozambique**, the semi-arid zones of the Zambezi basin (southern Tete province), the interior of Inhambane province and the central and southern zones of Sofala province, where anecdotal reports indicate failure of the main season production, particularly for maize. In **Zambia**, parts of Southern (parts of Kazungula/Livingstone, northern parts of Mazabuka and Choma, Gwembe valley) and Lusaka Province (parts of Chongwe and Kafue) have also experienced an erratic/ below normal rainfall pattern though the impacts have been less pronounced. In all these areas, food availability for the 2012/13 consumption season will be reduced, however this is not expected to result in critical consumption gaps over this period as many households, even the resource poor, will have access to the little that they will harvest in the April/May period. As markets are provisioned from the on-going harvests, prices are expected to stabilize, facilitating access for many households. However due to expected low production levels, prices are not expected to decline significantly, and are likely to start rising sooner than the seasonal norm. Overall, these areas will fall into IPC Phase 1 – minimal acute food insecurity.