SOUTHERN AFRICA
Food Security Outlook October 2007 to March 2008

Background

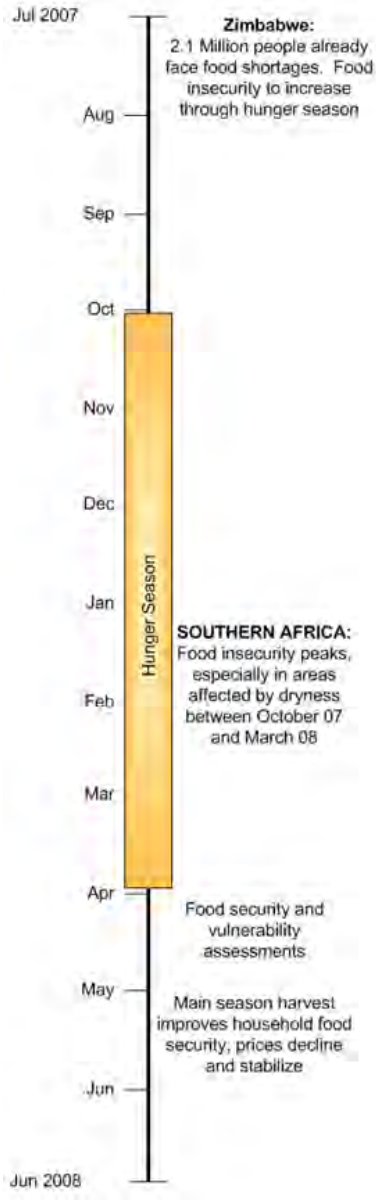
The FEWS NET Outlook for Southern Africa incorporates the findings from six country outlooks for the period October 2007 to March 2008. This outlook provides a basis for regional and global resource allocation and contingency planning, as well as in-country planning. This report summarizes the results of this process for Southern Africa, highlighting what FEWS NET believes are the major threats to food security in the period October 2007 to March 2008.

The most likely regional food security scenario between October 2007 and March 2008 is a continued decline in food security conditions in areas now facing moderate to high levels of food insecurity as noted above. The exception is Zimbabwe, where the situation as at end of September is expected to improve marginally between October and December, as the number of areas with high levels of food insecurity declines as a result of improvements in emergency interventions. The situation will however deteriorate again between January and March, during which the hunger season peaks, and more districts become moderately food insecure. This analysis takes into account the regional seasonal forecast which in general indicates a normal to above normal rainfall season for the period of the outlook.

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 and southern and central Mozambique, countries which face moderate to extreme 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. Extreme levels of food insecurity will arise in parts southern Mozambique in the period October to December; while in Zimbabwe, most extreme levels would occur in the January to March 2008 period.

In Lesotho and Swaziland, where widespread food insecurity has been assessed, the situation is likely to be mitigated through on-going emergency interventions targeted at vulnerable households. However adequate assistance will depend on improvements in the responses to appeals for resources by governments and humanitarian agencies. Currently the UN appeals for emergency assistance are 18 percent funded in Swaziland, and 49 percent in Lesotho.

Early Warning Timeline



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Regional early warning priorities

Priority Situation	Main Issues
1. Zimbabwe	**Food security has deteriorated in most of the country, particularly in the southern and western areas worst affected by drought during the 2006/07 agricultural season.** In addition to drought, hyperinflation, price controls, fuel shortages, and economic collapse underlie Zimbabwe's worsening food crisis. Over the next six months, the most likely food security scenario is a worsening of the crisis affecting more and more people through the October to March hunger season. But, the combination of government imports, international food aid and a normal agricultural season are likely to ameliorate the worst consequences of the crisis and prevent widespread starvation. If, however, the government is unable to close the national food deficit and food aid deliveries are limited, a worst case scenario will quickly emerge, with even more widespread and extreme food insecurity affecting a large proportion of both the rural and urban populations of the country.
2. Southern Mozambique	**About 520,000 people are currently highly food insecure and in need of immediate humanitarian assistance through March 2008 in seven provinces in southern and central Mozambique as a result of weather shocks, including drought and flooding, in early 2007**. The government and the humanitarian community are planning intervention strategies at the provincial and district sublevels and identifying and prioritizing the most vulnerable households. In the most-likely scenario, food security is expected to improve moderately from October to December and improve significantly from January to March 2008. This improvement will result from adequate levels of humanitarian assistance, the contribution of second-season production, a good start of the rains in October and their gradual improvement throughout the rainy season, which in the most-likely scenario, would lead to gradually increasing availability of crops from the green harvest from January/February 2008. If these assumptions do not hold, a worst-case scenario will develop, and food insecurity will deteriorate with an additional 140,000 people requiring food assistance by October 2007.
3. Lesotho and Swaziland	**About 401,200 people in Lesotho and 407,000 in Swaziland are facing high levels of food insecurity as a result of the severe drought during the 2006/07 season and require emergency food assistance until March 2008.** The respective governments and humanitarian agencies are responding through a range of interventions to mitigate the severe food shortages. Food insecurity is likely to remain widespread through the next six months, but its severity will be mitigated if planned interventions are timely and adequate, and if the 2007/08 rainy season is good and agricultural inputs are accessible to vulnerable farming households. The UN has appealed for US$18.9 million for Lesotho and US$ 15.6 million for Swaziland to support the respective government's efforts to provide emergency food assistance, as well as other interventions focused on strengthening the livelihoods of food insecure people. WFP has revised its regional Protracted Relief and Recovery Operation (PRRO) to meet increased needs, and their pipelines in both countries are fully resourced only through January, after which pipeline breaks will be experienced. If adequate supplies are not secured, food insecurity may deteriorate, especially as the breaks are expected during the peak of the hunger season.

Current food security situation

Food security conditions in the region remain mixed; reflecting the mixed production pattern of the 2006/07 season. The situation is generally stable and satisfactory in those parts of the region where crop production has been good (Malawi, Tanzania, Zambia, northern Mozambique and parts of Angola). In contrast, food insecurity levels are high where crop production has been severely reduced on account of drought, such as in Zimbabwe, Lesotho, Swaziland and southern Mozambique.

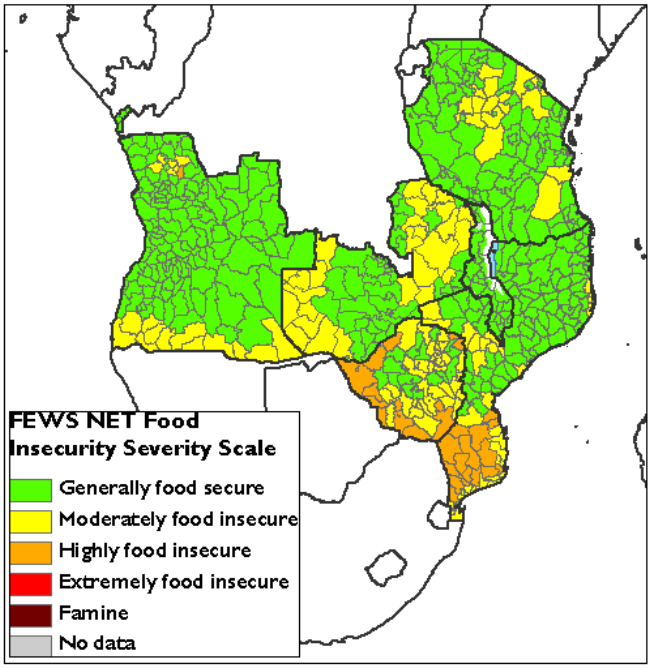
In **Malawi, Tanzania, Zambia and northern Mozambique**, significant cereal carryover stocks from the previous year have further boosted food availability and, consequently, staple food prices remain relatively stable and lower when compared to last year and the past 5-year average. This has facilitated access to adequate amounts of staple food for most market-

dependant households. In addition, good rains in the 2006/07 season were beneficial to pasture and water availability, thus improving livestock condition and prices.

Nonetheless, localized cases of food insecurity still exist in these countries. Food security and vulnerability assessments have revealed that in the areas that were adversely impacted by excessive rainfall, there are pockets where vulnerable groups have required food assistance since July, and these needs will increase during the hunger season, from October through March (see Figure 1). In **Tanzania**, results from a rapid vulnerability assessment in mid-August are expected to establish the size of the country's food insecure population, while in **Zambia**, the VAC assessed that 441,000 people will require food aid during the hunger season as a direct result of excessive rainfall experienced in western and northern parts of the country. In **Malawi**, the VAC did not find a significant number of cases of transitory (acute) food insecurity, though there are pockets of chronic vulnerability. In **Angola**, although this year's harvest is estimated to have exceeded last year's, production remains insufficient to cover national food requirements, and there are several areas where households face food deficits as a result of weather related shocks (in Cunene, parts of Huila and Cuando Cubango) and cassava mosaic virus (parts of Uige), and are likely to become food insecure well before the hunger season begins in October.

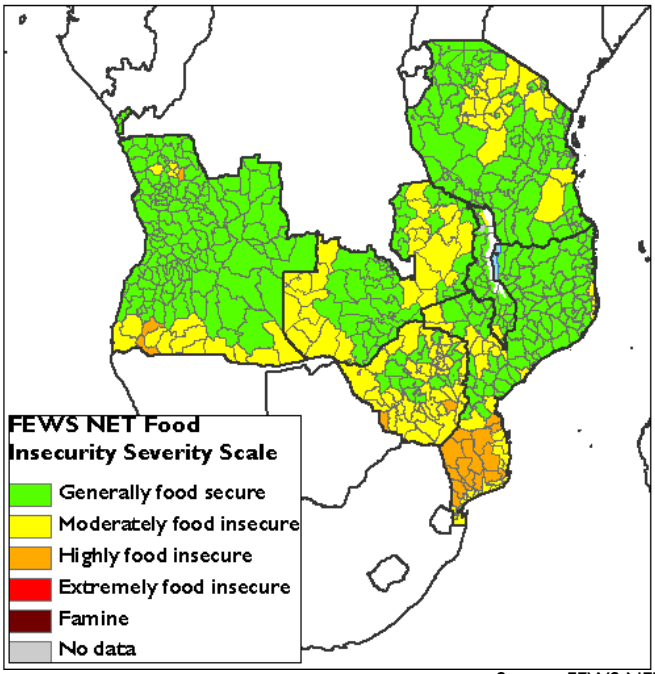
In **Zimbabwe,** the negative impact of below-average rainfall performance, and, in the case of Zimbabwe, lack of seeds, inputs, spare parts, irrigation and fuel resulted in below normal harvests. In Zimbabwe, this season's poor production follows several consecutive years of below-normal harvests and critical food shortages. This season, severe food deficits have again been assessed as a result of low levels of cereal availability, even compared to the past five-year average. Every province in the country is assessed to face a cereal deficit this year. The worst affected provinces are the traditionally grain deficit provinces of Matabeleland and Masvingo – both hard hit by drought. Most households in these areas have run out of their own food stocks and are already reliant on inadequate and erratic maize supplies through the Grain Marketing Board (GMB), the government parastatal with a monopoly on maize sales and distribution. Food insecurity levels are further exacerbated by the economic crisis that has restricted market supplies of food and other basic commodities, as well as purchasing power and opportunities for gainful employment.

Figure 1. Estimated current food security conditions (as of September 2007)



Source: FEWS NET

Figure 2. Estimated food security conditions under most likely food security scenarios (October to December 2007)



Source: FEWS NET

The Government of Zimbabwe and humanitarian organizations are making efforts to mitigate the food shortages and provide emergency assistance for about 4.1 million people. The governments of Malawi and Zimbabwe have arranged for Malawi to export 400,000 MT to Zimbabwe, almost half of which (185,700 MT) had already been delivered by the end of September 2007. Humanitarian organizations plan to import an additional 352,000 MT of food, the bulk of which is expected to arrive between September and December 2007. Nonetheless, the country still faces a national cereal gap. However, given the past performance of the government, it is likely that this gap will be filled – especially since there are elections in early 2008.

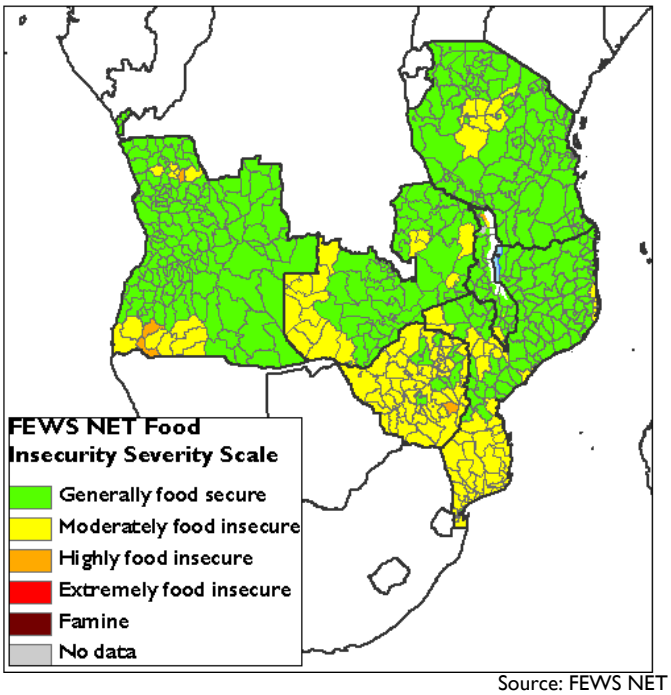
In **Mozambique**, because of below average rainfall performance in the last season, 520,000 people (mostly in the south) are facing growing levels of food insecurity and require humanitarian assistance until March 2008. Slow deliveries of emergency supplies, high food prices and limited coping strategies are exacerbating existing food insecurity conditions. Ongoing efforts to adequately identify target beneficiary groups at the district sublevel need to be accelerated, especially in the worst affected areas of the south, where most households have already exhausted their food reserves and have had to rely on the market earlier than normal. Consequently, average maize prices have risen sharply since the harvest and are currently about 50 percent above the 5-year average as a result, limiting market access for the majority of households. Prices are likely to remain at these abnormally high levels until February next year when the first green harvest and other seasonal food crops become available.

Overall, prospects for the second season harvest are mixed. The low levels of rainfall and the abnormally high temperatures during this season permitted only a limited number of households and farmers associations with access to lowlands and irrigation facilities to produce for their own consumption and for sale, mainly horticulture crops. For most households in areas further from the lowlands, the second season harvest has been negligible, resulting in increasing food insecurity.

Most-likely regional food security scenarios

The most likely regional food security scenario between October 2007 and March 2008 is a continued worsening in conditions in areas now facing moderate to high levels of food insecurity as noted above. The exception is Zimbabwe, where the situation as at end of September is expected to improve marginally between October and December, as the number of areas with high levels of food insecurity declines as a result of improvements in the number of beneficiaries and geographic coverage of emergency interventions. The situation will however deteriorate again during the period January to March, during which the hunger season peaks, with more districts becoming moderately food insecure. Table 2 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 3. Estimated food security conditions under most likely food security scenarios (January to March 2008)



Source: FEWS NET

Table 2: Most likely food security scenarios October 2007- March 2008

Country	Scenario assumptions	Food security implications
Angola	▪ Food supplies generally satisfactory due to last season's good harvests, *nacas* and the first season harvest between October 2007 and February 2008 ▪ Localized areas in the north and center have below average cassava yields due to the mosaic virus ▪ In the south (Cunene and Huila), *nacas* activities are limited, and the unimodal nature of the area's cropping limits food availability ▪ SADC/DMC forecast of normal to below normal rains holds true in most of the northern and eastern provinces	▪ Stable and generally satisfactory food security conditions in most parts except some districts in the south and localized areas in the north ▪ Current levels of food insecurity among vulnerable groups especially in the south become extreme as the hunger season progresses and due to reduced availability of *nacas* and first season harvests ▪ In the north and center, food insecurity levels may rise due to reduced cassava production this year
Malawi	▪ Most households have adequate maize stocks to last through the hunger season ▪ Winter maize harvest is favorable ▪ The government has enough stocks to appropriately intervene if the need arises ▪ ADMARC markets are well stocked with maize ▪ Maize prices remain relatively low and stable ▪ *Ganyu* labor rates and livestock prices are favorable	▪ Food security conditions will remain generally satisfactory until the next harvest ▪ Poor, chronically food insecure households will face moderate food insecurity over the hunger season, peaking in January/February 2008. ▪ Markets are adequately supplied and ease food access of poorer market dependent households
Mozambique	▪ Most households in the north and parts of the center have adequate food stocks to last through the season ▪ Limited contribution of the second season crop ▪ High food prices in the south and part of the central region ▪ Food aid pipeline replenished and secured ▪ Timely on-set of rains, good 2007/08 rainy season, and adequate and timely supply of inputs	▪ Tight food supplies in the south and very high prices will limit access by vulnerable households until the green harvest becomes available in February/March ▪ Adequate responses to food insecurity will improve conditions, especially in the drought areas of the south and parts of the center. ▪ Stable and generally satisfactory food supplies in the north and parts of the center
Tanzania	▪ Food is adequately available from main season harvests ▪ The onset of the *vuli* season in bimodal and the *musimu* season in unimodal areas is timely and an average *vuli* harvest is realized in February ▪ Food prices increase seasonably, but remain affordable ▪ Pasture conditions remain stable	▪ Stable and generally food secure conditions ▪ Markets are adequately supplied, and prices remain stable ▪ Pastoralists and agro-pastoralists will also face stable conditions
Zambia	▪ Floods and prolonged dry spell over the 2006/07 season affects localized areas in western and northern Zambia only ▪ Surplus supply of staple food as a result of above average production and exceptionally large carryover stock ▪ Food Reserve purchase program does not significantly impact on maize prices ▪ Limited quantities allowed for private sector exports ▪ Maize prices remain low and below normal ▪ Livestock movement restrictions continue to have a low impact on livestock prices ▪ Near normal 2007/08 rainy season	▪ Stable food security conditions due to good production and large carryover stocks ▪ Markets adequately supplied and prices remain stable and low ▪ Limited assistance will be required by flood affected households mainly in north western and western provinces starting in September 2007 ▪ Emergency assistance also required to combat water borne diseases

Zimbabwe

- The national cereal deficit will be filled by both commercial and food aid imports, though GMB distribution will continue to be erratic and inadequate
- Food aid distributions will significantly improve food availability in rural areas and for targeted urban communities
- 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
- Near normal 2007/08 rainy season
- The commercial farming sector continues to face shortages of fuel, electricity and foreign currency
- Food insecurity will deteriorate in both rural and urban areas until the green harvest becomes available at the end of February
- Emergency assistance for 4.1 million people is required and needs to be scaled up as of October to mitigate widespread starvation
- Local bottlenecks in grain distribution will constrain household food access and further increase levels of food insecurity especially in the grain deficit in the southwestern parts of the country
- A favorable 2007/08 rainy season and adequate seed stocks may help mitigate the impact of the food crisis by availing seasonal labor opportunities, and improving food supplies through seasonal food crops like pumpkins

Priority worst case food security scenarios

Zimbabwe

In Zimbabwe, a worst case scenario might emerge if the government is unable to import and distribute adequate amounts of grain, and humanitarian food aid is either under-resourced or severely disrupted by logistical challenges. This scenario would be further exacerbated by a below-normal rainfall season, which would reduce the availability of casual labor opportunities of poor households between October 2007 and March 2008.

The worst case scenario would entail a sharp and severe decline in food security conditions, especially in the grain deficit areas of the south and west, and a major humanitarian crisis with extreme food insecurity would emerge. The worst conditions, including potentially significant increases in malnutrition, morbidity, and destitution would be seen over the period January to March 2008. Under this scenario, maize availability and access would become even more constrained than they are at present. The GMB would struggle to deliver the imported maize, due to shortages of trucks and fuel. Humanitarian food assistance would not be adequate to meet needs either because of poor resourcing levels or because the government restricts humanitarian operations.

At the same time, the green harvest would be delayed and short-lived in the traditionally high potential agricultural areas in the north and center of the country, and largely absent in the rest of the country. The better-off households and those who realized some cereal surpluses would hold onto their grain because of the prospect of a poor harvest. Livestock conditions would also deteriorate as a result of limited water supply and shortage of grazing.

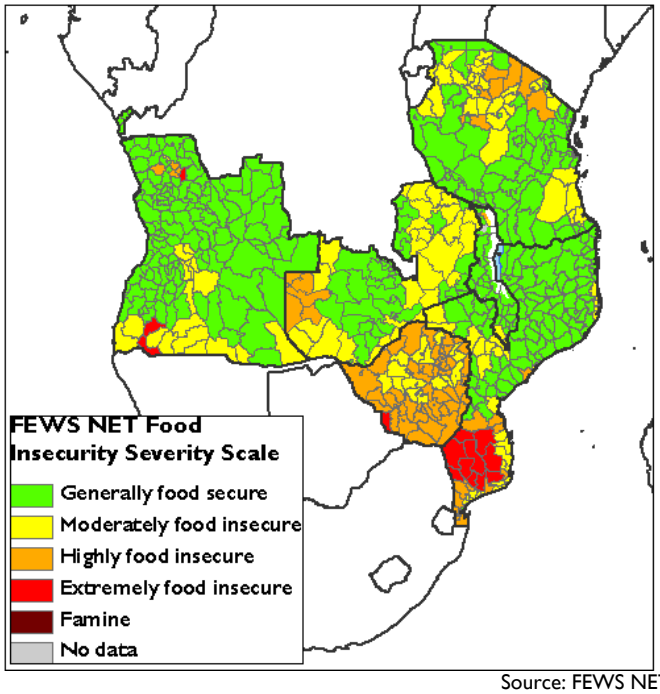
Under these conditions, a much larger proportion of the rural population would be food insecure and conditions more severe than in the most likely case scenario. Increasingly irregular market supplies, food inflation, and exorbitant prices would all contribute to an extreme food security crisis. Figure 4 provides a projection of the potential food security conditions under this worst case scenario.

Mozambique (South and Center)

In the worst-case scenario, low food availability and weather shocks would increase levels of food insecurity in the southern and central regions between October and March. Humanitarian assistance provided to drought-affected households would be inadequate, especially in the most remote and semi-arid zones of the Limpopo basin. The second-season production would be even lower than in the most-likely scenario, with almost no mitigating impact on the prevailing levels of food insecurity. Staple food prices in the south would become extremely high – up to almost double the average.

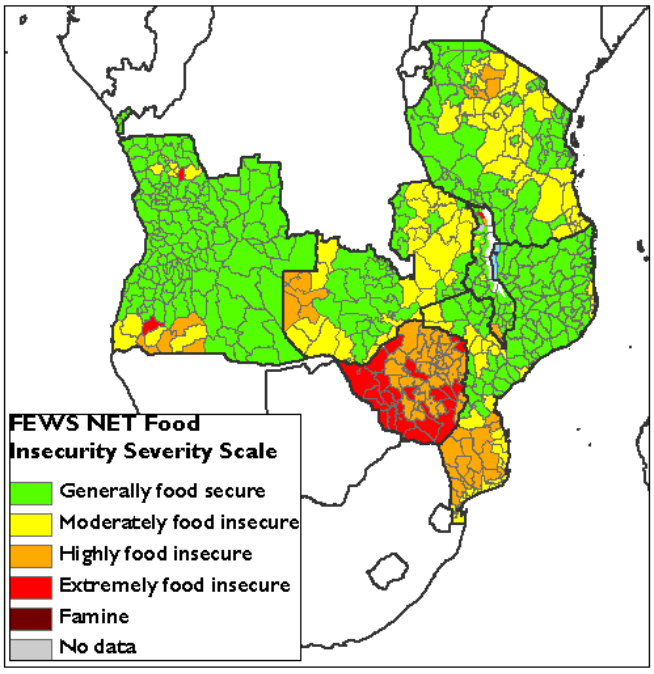
This worst case scenario would be exacerbated if onset of rainfall is delayed, and the season is characterized by long dry spells providing inadequate moisture for crops to develop. The poor rainfall would result in severe water shortages for humans and livestock, and would lead to a delay in the availability of the green harvest at the beginning of 2008. In this scenario, the 140,000 people that were assessed as 'at risk' of food insecurity in the southern and central regions would become food insecure. Food availability, especially between October and December, would be even lower than in the most-likely scenario, combined with inadequate humanitarian assistance, especially in the drought-affected areas. These conditions would be exacerbated by extremely high food prices and deteriorating terms of trade between household livestock and cereal, especially in remote areas where such transactions are made in kind. The lean season could be longer and more severe than normal. Water shortages could limit water availability for consumption by humans and livestock. In the worst case scenario, the number of households facing extremely food insecure from October to December increases, and more than the assessed 660,000 people may need food assistance, water interventions and input assistance by October.

Figure 4. Estimated food security conditions under the worst case food security scenario (October to December 2007)



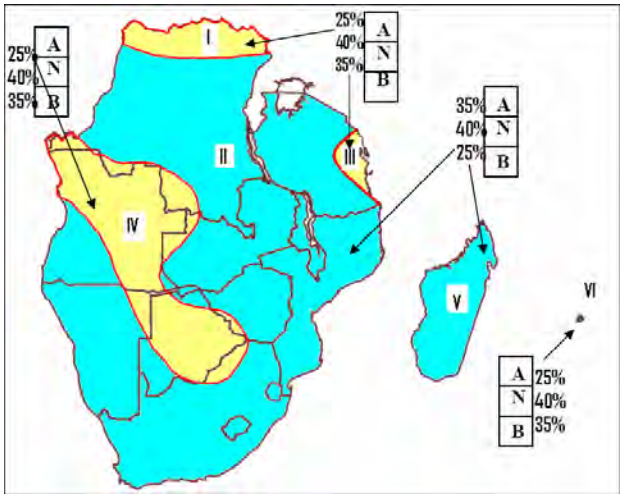
Source: FEWS NET

Figure 5. Estimated food security conditions under the worst case food security scenario (January to March 2008)



Source: FEWS NET

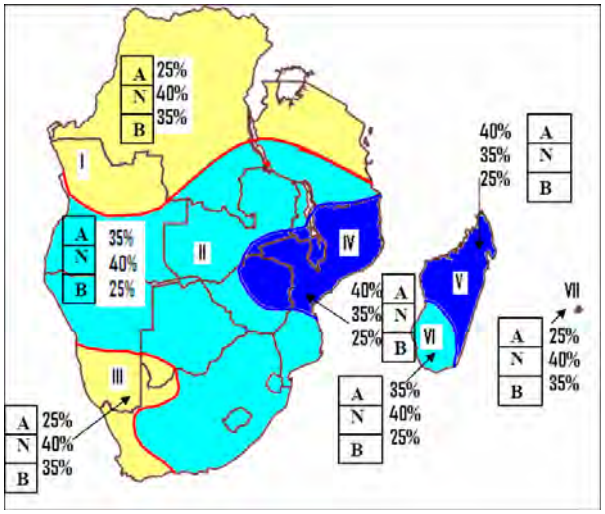
Climate Outlook for October 2007 to March 2008



SADC October-November-December (OND) 2007 Rainfall Forecast

Increased Chances of rainfall being

I – Normal to Below normal
II – Normal to Above normal
III – Normal to Below normal
IV – Normal to Below normal
V – Normal to Above normal
VI – Normal to Below normal



SADC January-February-March 2008 (JFM) Rainfall Forecast

Increased Chances of rainfall being

I – Normal to Below normal
II – Normal to Above normal
III – Normal to Below normal
IV – Above normal
V – Above normal
VI – Normal to Above normal
VII – Normal to Below normal

Source: Eleventh Southern Africa Regional Climate Outlook Forum, September 2007 – SADC Drought Monitoring Centre

National and regional climate experts from National Meteorological Services and the SADC Drought Monitoring Centre met in early-September to develop a consensus seasonal forecast. Because the forecast assumes a weak La Niña event, it is most likely that the region will receive good rainfall during the six months covered in the forecast period. However, for some parts of the region, such as DRC, Angola, Botswana, Namibia, Tanzania, and Mauritius, the likelihood is for below normal rains over the period October-November-December (OND), while over the January-February-March (JFM) period, less rain is expected over Mauritius, the northernmost and extreme south-western parts of the region.

The forecast is based on probabilities derived from 30 years of historical rainfall data, and considers the state of the global oceanic atmospheric system and its implications for the region. Climate experts caution that the forecast is relevant only for seasonal time scales and for relatively large areas, and that local and month-to-month variations should be expected. Users are advised to contact national meteorological agencies for local forecasts and interpretation.

The SADC Remote Sensing Unit in its first issue of the Agromet Update for the 2007/08 season (www.sadc.int/) provided an interpretation of the seasonal forecast that provides implications for agricultural production at the regional level. Overall however, a normal rainy season is expected in the region, which will support normal agricultural activities and will be particularly beneficial in Lesotho, Swaziland, Zimbabwe and southern Mozambique that had below normal rainfall last season.