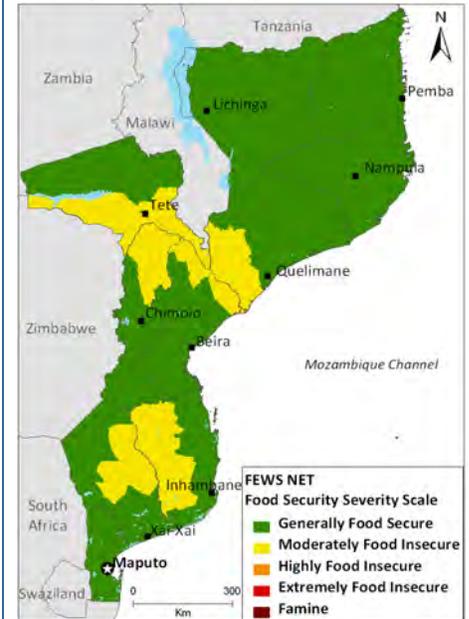


MOZAMBIQUE Food Security Outlook

July to December 2010

- The majority of households in the country will be able to meet basic food needs throughout the outlook period. Despite the poor harvest in the south and central areas and the resulting impacts on household food stocks and employment, most households will cope and meet basic food needs and have no acute food insecurity. Also during this period, some food from the second season production will contribute to food availability at the household level.
- Between July and December, moderate levels of food insecurity will continue among poor and very poor households in the Zambezi Basin: parts of the Mágoe, Cahora Bassa, Changara, Moatize, and Mutarara districts in the Tete province; the Guro, Macossa, and Tambara districts in the Manica province; the Chemba, Caia, and Marromeu districts in the Sofala province; and the Chinde, Mopeia, and Morrumbala districts in the Zambézia province, and in the semi-arid interior of the Gaza and Inhambane province (the districts of Chigubo, Mabalane, Panda Mabote, Funhalouro, and north of Guija and Chibuto).
- Food security conditions may deteriorate later in the October to December period when the lean season will peak. It is most likely that if this occurs, households in a few other districts in the south will become moderately food insecure.
- Although available information is still scarce, the ongoing discharges from the Cahora Bassa dam in the Zambezi River may destroy second season crops along the riverbanks and in floodplain areas where local households typically practice their second cropping season following the recession of water after the rainy season.

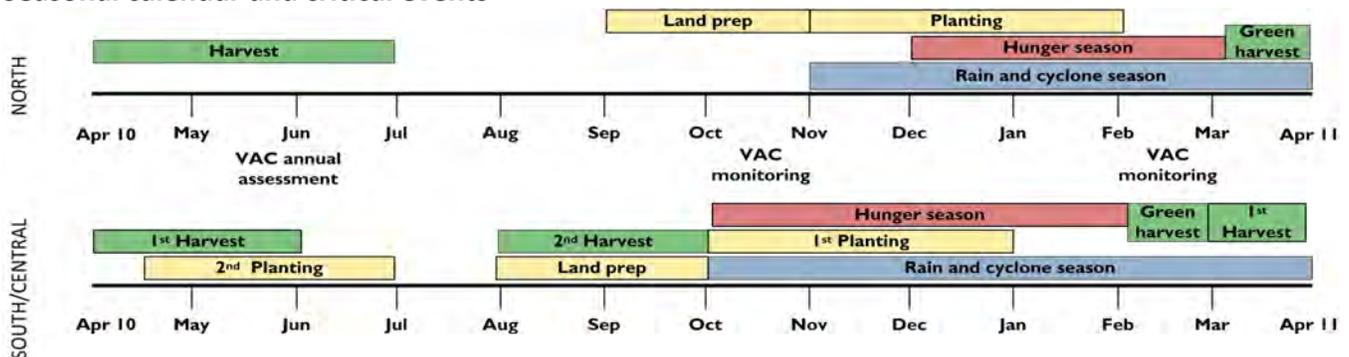
Figure 1. Current estimated food security outcomes, July 2010



Source: FEWS NET and WFP

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

Seasonal calendar and critical events



Source: FEWS NET

Most likely food security scenario (July-December 2010)

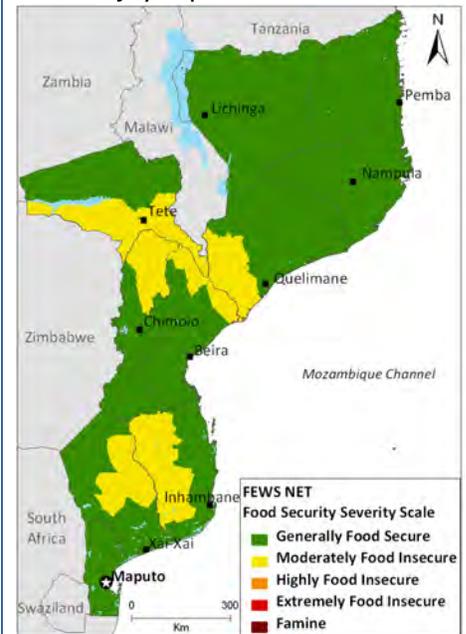
Following this year’s shocks in February and March, including drought in the south and central zones and floods in the Zambezi, Púngoe, Búzi, Licungo, and Save basins, combined with prevailing chronic vulnerability, the Vulnerability Assessment Group (GAV) from the Technical Secretariat for Food Security and Nutrition (SETSAN) has identified 456,290 people nationally as moderately food insecure who require food assistance from April 2010 to March 2011. The ongoing SETSAN/GAV assessment will update that figure as well as the associated needs. The food insecure population includes poorer households with limited ability to cope with recurrent shocks. These people are located in 65 districts over eight provinces (except Cabo Delgado and Niassa) mainly in areas that were affected by this season’s shocks. However, according to the Crop and Food Supply Assessment Mission (CFSAM), food security conditions are not as dire as anticipated after the MINAG’s preliminary assessments in February/March, with conditions varying from moderately food insecure to generally food secure. Though food security conditions are currently favorable across the country with most staple foods available and accessible from both own production and from local markets, food security conditions may deteriorate later in the October to December period when the lean season will peak. It is most likely that if this occurs, households in a few other districts in the southern area will become moderately food insecure.

The recently released preliminary production estimates from the Ministry of Agriculture (MINAG) indicate that 2009/2010 cereal production (including maize, sorghum, millet, and rice) was about 2.78 million MT, an increase of six percent from last year and 27 percent above the five-year average (2004/2005-2008/2009). The production of pulses at the national level is estimated to be 421,453 MT, nearly three percent higher than last year and close to 14 percent above average. The national production of cassava was 9.7 million MT, an increase of six percent over the previous season and 26.2 percent above the five-year average. Cassava production was particularly above average in the south, by about 34 percent, which will supplement the deficit of cereals in the area in terms of local food availability.

Food balance estimates recently released by the National Directorate of Commerce (DNC) indicate a total cereal deficit of 493,000 MT for the April 2010 to March 2011 marketing year, which is expected to be covered by commercial imports and food assistance. The deficits are mostly in rice (238,000 MT) and wheat (370,000 MT). The total available maize has exceeded total domestic consumption needs by 107,000 MT. The DNC foresees a total of 830,000 MT in cereal imports: 122,000 MT of maize, 275,000 MT of rice, and 433,000 MT of wheat. Expected exports are 153,000 MT of maize and 2,000 MT of wheat. The southern area had a total deficit of 659,000 MT of cereals and the central area had a total deficit of 73,000 MT. For other foods, such as tubers, beans, and peanuts, the food balance indicates favorable production, which is sufficient to cover national consumption needs, especially in the north and center of the country. For these commodities, the DNC foresees surpluses of 67,000 MT for cassava, 32,000 MT for other tubers, and 38,000 MT for beans/peanuts.

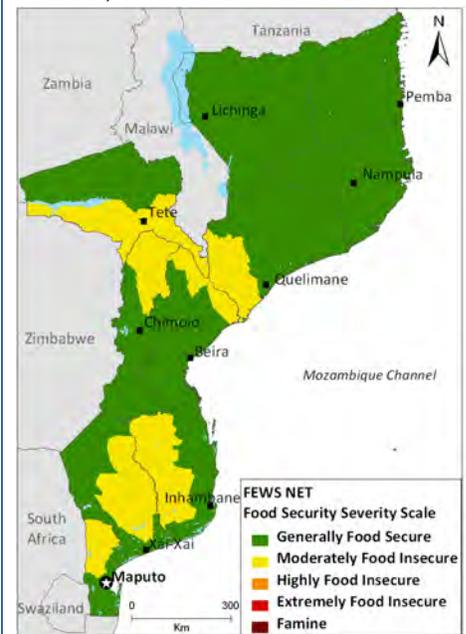
In the Zambezi Basin (the Mágoe, Cahora Bassa, Changara, Moatize, and Mutarara districts in the Tete province; the Guro, Macossa, and Tambara districts in Manica the province; the Chemba, Caia and Marromeu districts in the Sofala province; and the Chinde, Mopeia, and Morrumbala districts in the Zambézia province) there are two agricultural seasons: the first season from November to April, and the second season during the cold and dry period from May to August. The late start of rains (November/December) in the central region was followed by relatively dry conditions with erratic and

Figure 3. Most-likely food security scenario, July-September 2010



Source: FEWS NET and WFP

Figure 3. Most-likely food security scenario, October-December 2010



Source: FEWS NET and WFP

poor rainfall for up to two months after the first planting. The flood situation in the Zambezi River floodplains was exacerbated by the Cabora Bassa Lake releases. All areas in the semi-arid zones of the central region experienced a prolonged dry spell after the first planting. Poor maize production is occurring when compared to last year, but is still better than previous years. Production of sorghum, millet, and cassava is similar to previous years. Production of cowpea, pigeon pea, and groundnut is satisfactory. In February, the food insecure population was estimated at 265,000 people located in the above mentioned districts of the Zambezi Basin, comprised mostly of poorer households with a limited ability to cope with recurrent shocks and located mainly in areas that were affected by this season's drought and floods. The SETSAN/GAV is undertaking a quantitative vulnerability assessment for food security and nutrition which will update the current figure of food insecure people as well as the associated needs. The report will likely be released in early September.

It is likely that abnormally high food prices, due mainly to reduced crop production in the area, along with fuel and feed prices typical of the area, may reduce food access for the poor and very poor households by September. These factors may also reduce food access for middle-income households particularly during the lean season (October to December) when most food reserves will have been exhausted and most households will turn to markets as the main source of food. Drought conditions will most likely prevail during the second season, especially in the rain-fed areas. Although the second season has a relatively small contribution to household annual food stocks and consumption, it plays a role as a mitigating factor for depleting food stocks and also functions as a source of income. Since the rainfall during the second season is quite insignificant or there might be no rain at all, second season production is mostly practiced in the lowland area with enough residual moisture or in areas with irrigation systems. There is also the continuing Cahora Bassa Dam releases, which may damage the second season crops along the riverbank areas of the Zambezi Basin, from which the harvest was expected around August/September.

It is assumed that some events are expected to behave normally including second season crop production in the lowlands where moisture content is available; the start of rains in November/December, the start of land preparation in October/November, the start of planting in November/December, and the start of the lean season in October.

Given the above described shocks and normal events, the main effects will most likely be the impact on purchasing power for poor and very poor households. Purchasing power will likely be reduced given the high prices of food paired with the low pay that households can earn from labor, leaving households unable to purchase the food they require. Most households will be forced to employ coping strategies earlier than normal to meet food requirements. Due to drought conditions there will be a limited second season harvest in places away from the riverbanks. In such cases, yields can potentially be reduced by 50 percent from normal yields. Drought conditions may result in limited water availability for both human and animal consumption. The quality of pasture will be poor as a result of dry conditions. Limited or no harvest from the second season along the riverbanks will be expected. Usually inundations increase the number of fish caught and increase income for middle and better-off households. Trade flows are likely to be constrained as result of these conditions as well.

To cope, middle and better-off households will sell livestock as needed. Because livestock levels are low, there is little opportunity for most households to raise a significant amount of cash through the sale of livestock. Traders will make up for some of the market supply shortfall by bringing in additional cereals from the more productive zones in the northern Tete province, central Manica province, and central and northern Zambezia province. As stated above, poor households will rely on markets but high prices will limit their purchasing power. To address the deficits, these households will likely employ typical coping strategies including skipping meals, selling natural products such as grass, building poles, selling firewood, producing and selling charcoal, informal labor, and hunting. Also, these households will sell small domestic animals especially poultry and small sized livestock such as goats and pigs. Households will increase consumption of wild foods, and switching of expenditure from non-food to staple food items as well.

While these coping strategies are typical and not immediately negative, they are also not sustainable for poor and very poor households. These households will only be able to meet their food needs through accessing external assistance. Pending the release of the SETSAN/GAV information, response plans may be implemented. A combination of ongoing social safety-net programs and emergency food assistance will likely be part of the response especially for the most poor and vulnerable households with no animals and those resorting to more extreme coping strategies. Without external assistance the poorer are likely to start to eat toxic foods, passing days without food, disposing meager assets. The food conditions could worsen in particular during the lean season.

Households that may benefit from the response plan include households headed by elders, widows, and children, and those established in the resettlement centers with disrupted livelihoods due to the recent floods. The government has officially launched the onset of the second season in April 10, 2010. This shows the commitment and the high importance the government is giving to this year's second season. The event includes massive distribution of seeds and inputs. The purpose of this high level commitment is to urge communities to take maximum profit of the second season production that normally contributes only 15 to 30 percent to the total annual production. The success of the second season will also depend on the agro-climatic conditions in the country, especially the availability of soil moisture.

Once households, the government, and government partner responses have been incorporated, the following food security outcomes are expected. From July to December, the majority of households will be able to meet basic food needs since the main harvest will be able to supply basic food, though the poor and very poor households will remain moderately food insecure. Exceptions include mainly those who have lost their basic livelihoods due to the floods and those who are currently still established in the resettlement centers – these people are under assistance by the government/the World Food Program (WFP). Between August and October 2010, despite the poor harvest and the impacts on household food stocks and employment, the adoption of non-extreme coping strategies (listed above) will help most households to meet basic food needs. Also during this period, some food from the second season production will contribute to food availability at the household level. Between November and December, the area will enter the lean season, with the peak in December. A number of coping strategies will be employed including the increased sale of livestock by wealthier households, and the reduction of daily meals by poorer households. Able-bodied household members will seek casual labor especially in land preparation and planting.

Although available information is still scarce, the ongoing discharges from the Cahora Bassa dam in the Zambezi River may destroy second season crops in the riverbanks and in floodplain areas where normally local households practice their second cropping season following the receding of water after the rainy season. The impacts and magnitude of damage from the flooding are still unknown but coordinated actions to assess this have been started by local government authorities. Depending on the magnitude of impacts, this situation may compromise the second cropping season for the affected households by reducing food availability and income. These households that would have benefited from the September production will then be forced to adopt non-extreme coping strategies earlier than normal.

In the **interior of Gaza and Inhambane Province (the districts of Chigubo, Mabalane, Panda Mabote, Funhalouro, and north of Guija and Chibuto)** there is one agricultural season, and the area has poor access to markets. In normal years, most households produce enough food for the entire year. In bad years, market purchases, labor exchange for food, and the consumption of wild fruits supplement own crop production. According to the CFSAM, poor rainfall in the southern parts of the country affected production unlike in the northern parts where rains were generally normal with good maize harvests. The late start to the rains (November/December in 2009) was followed by relatively dry conditions with erratic and weak rainfall after the first planting. All areas in the southern region experienced a prolonged dry spell after the first planting. Poor maize production is occurring compared to last year, but is still better than previous years. In this region, most poor households depend on the market for food purchases; however, the prices are very high (two times prices in the north). For instance, in Maputo and Chokwé, two reference markets in the south, monthly prices of maize in June were 80 and 73 percent above the five-year average (2005-2009) and 26 and 42 percent above prices in the same period of last year, respectively.

For the interior semi-arid zone of Inhambane and Gaza, the Vulnerability Analysis Committee (VAC) from the SETSAN in February, estimated that around 45,000 moderately food insecure people require continued food assistance from April 2010 until April 2011. These are poorer households with limited sources of income, limited or no food reserves, and few assets. These households have also faced recurrent shocks that have eroded their coping capabilities. The food aid pipeline break in April 2010 is still of great concern and a humanitarian country team is planning an appeal soon as a way to mobilize needed resources. The May/June vulnerability assessments will provide more detailed information on the likely level and duration of assistance needs in this area.

Based on current dynamics and historical knowledge, it is likely that abnormally high food prices may reduce food access for poor and very poor households, especially from October to December when most household food reserves will have been exhausted and most households will turn to markets as the main source of food. The high food prices have been consistent

and persisting since 2008 and there are no indications that they will return to the levels of the five-year average. Although reasons behind the high food prices are not yet clear, some factors may include the growing pressure from the milling and feed industry, the increase in fuel costs and inflation, and/or drought conditions which led to limited and severe water availability for both animals and humans.

Some events are expected to behave normally including the start of rains in October/November, the start of land preparation in September/October, the start of planting in October/November, the start of the lean season in October (if the lean season does not start earlier in September), and the reduction of water availability for human and animal consumption which will occur starting in August.

Based on the shocks above, the main effects are that food access for most households will be relatively difficult, but since high food prices have been persisting since 2008, the current level of food prices marks a new level to which households must adapt. Market purchases will be limited as a result of this new level of high prices. As the season progresses, poor households will start to see reductions in food access, income, and the inability to meet other discretionary needs. Because of the droughts that caused severe water shortages for both humans and animals, households will be forced to temporarily migrate in search of water, and pastures will be in poor condition. The outbreak of disease is likely due to a lack of water and the related deteriorating livestock conditions. Given the drought, a delay in starting land preparations for the next agricultural season is possible, and this will result in a limited opportunity for casual labor.

In poor rainfall years (bad years), most households run out of maize and pulses, and cassava is important in filling the gap. Labor exchange and purchase are important supplementary food sources in bad years. Middle and better-off households will sell livestock as needed. Because livestock levels are low, there is little opportunity for most households to raise a significant amount of cash through the sale of livestock, and this is limited to middle and better-off households. Traders will make up for some of the market supply shortfall by bringing in additional cereals from the more productive zones in the northern Tete province, central Manica province, and central and northern Zambezia province. To complement the deficits, these poor households will likely employ coping strategies including skipping meals, selling natural products such as grass, building poles, selling firewood, producing and selling charcoal, informal labor (working in exchange for food), and hunting. Poor and very poor households will increase consumption of wild foods and will switch expenditures from non-food to staple food items. A combination of ongoing social safety-net programs and emergency food assistance will be part of the response especially for the most poor and vulnerable households with no animals and those needing to adopt extreme coping strategies. The government is also providing support to the agricultural sector through the Action Plan for Food Production (PAPA) and the Seven Million district program.

Once households, the government, and the government partner responses have been incorporated, the following food security outcomes are expected. For the majority of households (middle and better-off), better-off households may be able to draw down on extra stocks, or sell off a few livestock to obtain sufficient quantities of food, whereas poorer households may face constraints on available income and resources to convert into food after September. Assuming that will be adequate food aid for the identified moderately food insecure people and, some supply from central and northern areas will improve market food availability by July, poor and very poor households will shortly depend on market purchases. Households in the semi-arid interior of the Gaza and Inhambane areas will likely make up for some of their deficits by employing coping strategies including: skipping meals and reducing dietary quality, strategies (viewed locally as signs of increasing stress but not necessarily as extreme coping mechanisms), selling natural products such as grass, building poles, selling firewood, producing and selling charcoal, selling poultry, informal labor, and hunting. These households will sell labor to wealthier households, particularly in preparation for the next main agricultural season in August.

After September, poor households are expected to face significant deficits because they will not be able to earn enough extra income to cover their losses in crop production and they will not have sufficient stocks to buffer themselves. Poor and very poor households will remain moderately food insecure throughout the scenario period. Intervention measures will be required to assist the nearly 45,000 food insecure people in the area, which were assessed in February 2010 as requiring food assistance until the next harvest in March 2011. Expected interventions by the government and its partners may include: provision of seeds, tools, water, and other agricultural inputs, and/or provision of immediate food and nutritional support for the populations who have lost their harvests and exhausted their ability to cope.

Table 1: Less likely events over the next six months that could change the above scenarios.

Area	Event	Impact on food security outcomes
Zambezi Basin	<ul style="list-style-type: none"> • Late start of seasonal rainfall. • Adequate seed supply and availability for the second season – widespread planting for the second season. • Second season rains normal to above-normal (moisture content is adequate). • Traders do not respond as anticipated and no additional stocks flow to the deficit areas - the lean season. • No adequate response in humanitarian assistance. 	<ul style="list-style-type: none"> • Will delay the main season planting and water supply, which can exacerbate the food insecurity conditions. • Favorable second season, continuous planting, production increase food availability from August to the end of the year. Food deficits will be less than expected. • Local market undersupplied, thus pushing food prices higher than current expectations. Food deficits, especially for poor households would be larger, particularly late in the lean season. • Failure to respond in a timely fashion will cause poorer households to begin employing negative and even extreme coping strategies, including consumption of improper food on a large scale, such as wild foods that are highly toxic.
Interior of Gaza and Inhambane province	<ul style="list-style-type: none"> • Late start of the rainfall. • Traders do not respond as anticipated and no additional stocks flow to the deficit areas. • No adequate response in humanitarian assistance. 	<ul style="list-style-type: none"> • Will delay the main season planting and water supply, which can exacerbate the food insecurity conditions. • Local market undersupplied, thus pushing food prices higher than current expectations. Food deficits, especially for poor households would be larger, particularly late in the lean season. • Failure to respond in a timely fashion will cause poorer households to begin employing negative and even extreme coping strategies, including consumption of improper food on a large scale, such as wild foods that are highly toxic.