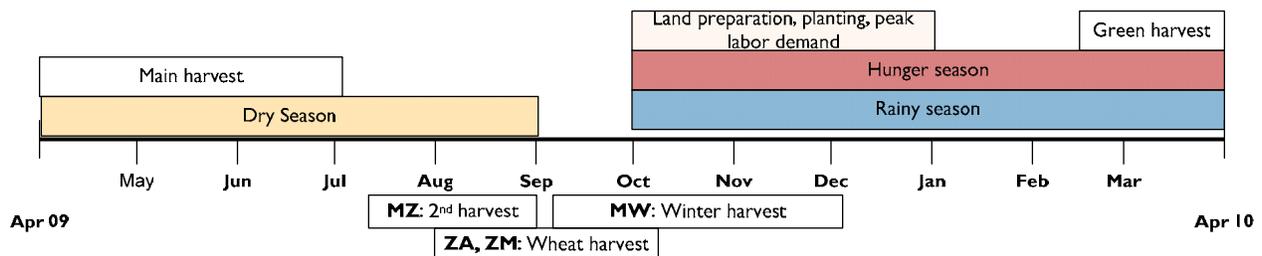


SOUTHERN AFRICA Food Security Outlook

July to December 2009

- Food security remains stable over most parts of Southern Africa, due to adequate availability of food from the May 2009 harvests. Improved food security conditions are expected in most of the region until the start of the next hunger season in October/November. However, isolated pockets of food insecurity exist in some areas where weather shocks affected crop production, and those rendered chronically vulnerable by the erosion of livelihoods and growing levels of poverty. Nonetheless, the recently concluded national vulnerability assessments indicate a much lower total food insecure population (about 2.4 million) this season compared to last year's estimate of over seven million.
- Crop harvest estimates also point to a better regional cereal harvest compared to last year, with most countries indicating increases in total cereal production, especially maize. Consequently, the total regional cereal deficit for the 2009/10 marketing year is projected to be lower than last year. South Africa — which has produced another record maize crop — has the capacity to cover the maize import needs of neighboring deficit countries. Projected surpluses from Malawi and Zambia (also with record maize crops) could also be made available for export if current export bans are removed. Lower maize prices in South Africa will contribute to lower import bills for countries with high import requirements.
- Current threats to overall regional food availability include the capacity of countries facing grain shortages (especially Zimbabwe, where the need is greatest) to import sufficient quantities, due to financial constraints and the fact that households that are food insecure because of production losses may not have the means to access market supplies. Many of the households assessed as food insecure already require external assistance, and ongoing interventions by governments and their partners may be inadequate to mitigate the situation until the next main harvest.

Seasonal calendar and critical events timeline



Source: FEWS NET

Current food security conditions

Current food security conditions remain satisfactory over most parts of Southern Africa, following average to above-average main season crop harvests around May/June. As a result, staple food prices have stabilized and are declining in many of the monitored markets – indicating stable food supplies and satisfactory food security conditions (see price annex attached). Food security and vulnerability assessments undertaken recently confirm that the majority of households where the growing season was favorable will have adequate access to food over this consumption season.

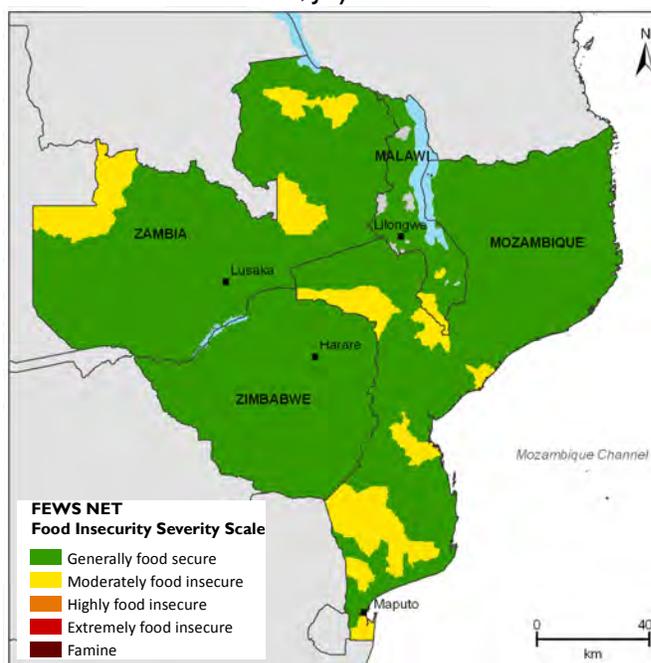
Food production and availability

Crop surveys, which provide official production estimates, have now been completed in most countries. However, a few countries are still using preliminary forecasts while official figures are being finalized. These figures provide indications (at the national and regional levels) of available domestic food supplies for the 2009/10 consumption year. Table 2 below

provides an overall comparison of regional production of the main cereal crops, and compares it with harvests from last year and the five-year average. Regional production shows a marginal improvement over last year (which was generally good), but is significantly above the five-year average. The pattern is similar for most countries across the region, except for Lesotho and Tanzania, where this year's harvest is lower than last year's and the past five-year average, and Namibia, where though this harvest is above last year's levels, it is still below the past five-year average.

This is mostly the result of the abundant rains throughout most of the region's main cropping season and record maize crops in Malawi (3.77 million MT), South Africa (12.12 Million MT), and Zambia (1.89 million MT). In both Malawi and Zambia, cereal harvests are projected to be 34 percent higher than last year. For South Africa, though the latest forecast (as of July 28) is eight percent below last season's production, it is still 37 percent above the 5-year average of 8.86 million MT. Maize production in the region is projected at 25.14 million MT, just marginally above last year's 23.93 million MT. South Africa's share of maize production has dropped from just over 55 percent last year to 48 percent, which is still above the average share of 45 percent (based on the five-year average) that it normally contributes to regional maize production.

Figure 1. Current food security conditions in FEWS NET countries in Southern Africa, July 2009



Source: FEWS NET

Table 1. SADC regional preliminary production estimates: 2008/09 compared to 2007/08 and the 5-year avg. ('000MT)

	Maize			Wheat			Sorghum/millet			All Cereals (including Rice)		
	5yr AVG	2007/08	2008/09	5yr AVG	2007/08	2008/09	5yr AVG	2007/08	2008/09	5yr AVG	2007/08	2008/09
South Africa	8,861	13,164	12,120	1,919	2,090	1,809	268	296	301	11,048	15,550	14,141
Other SADC*	10,183	10,764	13,020	343	292	365	1922	1902	1,951	13,540	14,189	16,582
TOTAL	19,904	23,928	25,217	2,296	2,382	2,174	2,196	2,198	2,252	25,488	29,739	30,928

Data source: SADC Food Security Early Warning System, SADC National Early Warning Units and Central Statistics Offices
 * Excludes South Africa, DRC and Madagascar

Tanzania, which is traditionally the second-largest producer of maize in the region, has suffered adverse production conditions this season in both bimodal and unimodal areas. Cereal production has been mediocre because of the failed short rains (*vuli*) and long rains (*masika*) seasons in the northern, northeastern, and coastal areas of the bimodal areas, and because of the below-average performance of main season (*musimu*) rains in parts of the unimodal areas. Consequently, Tanzania's maize production has dropped from 3.56 million MT last season to 3.42 million MT. This is insufficient to cover the country's maize requirements, and therefore cannot benefit neighboring grain-deficit countries; in a normal year, according to RATIN, Tanzania exports about 120,000 MT of maize. Nonetheless, Tanzania has produced surplus non-cereal crops (including bananas, potatoes, and cassava), which are consumed as substitutes for cereals. However, the bulkiness and perishability (including high transport costs) of these crops limits the amount that can actually be moved from surplus to deficit areas.

In Mozambique, preliminary cereal estimates of 2.6 million MT indicate 14 and 27 percent increases in overall production compared to last year and the five-year average, respectively. Maize production, estimated at 1.93 million MT, has increased 15 percent. Nonetheless, production results were less favorable in northern Maputo province, southern Gaza province, southern Sofala province, and southern Tete province, resulting from a combination of poorly distributed rainfall and pest infestations; cereal deficits are expected in those areas.

Zimbabwe's official estimates also indicate a much improved cereal harvest this year, despite the reported input shortages, the February dry spell, and other production challenges faced by farming households. Zimbabwe's cereal harvest is estimated at 1.56 million MT, a 148 percent increase over last year's worst-ever production levels, estimated by the Ministry of Agriculture at 628,000 MT. The five-year average for all cereals is 1.15 million MT, having been affected by the economic and political turmoil of the past 10 years.

Preliminary estimates from Angola, Botswana, Namibia, and Swaziland indicate improvements in overall grain production compared to last season, except in Lesotho, where crop performance has been worse than last season. However, even in these countries (especially Angola, Botswana, and Namibia), unfavorable conditions in some parts (incessant rains, floods, water logging, and the mid-season dry spell) have reduced what could have potentially have been much better crop prospects.

Vulnerability and food access

Despite the favorable food production, there are concerns in localized areas of most countries where the 2008/09 crop growing season suffered from heavy rains that resulted in flooding, loss of crops, and disruption of livelihoods, followed by an end of season dry spell in February and March. For example, despite average to above-average harvests in Mozambique, Zambia, and Malawi, localized areas are food insecure and require assistance. In parts of Lesotho, Namibia, Swaziland, and Zimbabwe, VAC assessments also indicate that many of the poorer households are already experiencing some degree of food insecurity as a result of reduced harvests (from weather-related shocks) as well the progressive erosion of livelihoods, resulting in increasing poverty levels and chronic vulnerability.

In Zimbabwe, assessments undertaken by the UN agencies (FAO and WFP) and the Zimbabwe Vulnerability Assessment Committee indicate varying levels of food insecurity following the 2009 harvests, which, though much improved, are still inadequate to meet domestic needs. The country's continuing economic decline has also been a factor. A joint FAO/WFP crop and food supply assessment mission (CFSAM) in May estimated that 2.8 million people will be food insecure during the peak hunger period (January – March 2010) in both urban and rural areas. The ZimVac, on the other hand, indicates a peak population of 1.4 million people as food insecure in rural areas; it does not estimate food insecure populations in urban areas. Nonetheless, both results are indicative of a concerning situation. As shown in Table 2, the ZimVac indicates a total food aid (cereal) requirement of 107,000 MT, which is well below the CFSAM estimate of 190,000 MT. Further analysis of the data generated through the August VAC food security assessments will inform updated estimates.

Data available at the end of July suggest that locally available maize and small grain stocks in Zimbabwe are insufficient to meet requirements, leaving a shortfall of 679,000 MT. However, if planned commercial maize imports of 330,000 MT and pledged food aid are realized, this shortfall will be covered. However, the Government of Zimbabwe's limited capacity to secure foreign currency for importing the required food and other socio-economic considerations, including threats to the operations of NGOs, may result in failure to have all planned commercial and food aid imports delivered and distributed; a factor that could threaten the food security of affected populations.

In March 2009, the Mozambique VAC provided a preliminary estimate, indicating some 247,000 food insecure people who require assistance. It estimated that 175,000 people in affected districts of Tete, Gaza, and Sofala provinces will require food assistance from July 2009 until March 2010, while an additional 72,000 in localized areas of Inhambane and Maputo province will need assistance beginning in October. These figures, however, are likely to increase following the August in-depth assessment, which will indicate more precisely the effects of the 2009/10 localized food shortages in affected areas in parts of the south and central regions.

In Malawi, where food security conditions have been improving significantly recently, preliminary results from the VAC indicate that 147,492 people will be missing food entitlements until the next harvest. These people are all located in the three southern districts (Chikwawa, Nsanje, and Balaka), which were adversely affected by a mid-season dry spell. These needs will be met through locally available food stocks, as the country has an estimated 1.2 million MT maize surplus.

In Zambia, the VAC assessed that only about 110,651 people require food aid this year, compared to 445,000 last year. This is mainly due to a more favorable crop-growing season, despite the floods/water logging from excessive rainfall experienced in different parts of the country (but especially Southern and Western provinces). The food-insecure populations were assessed in seven of the flood-affected districts, and are estimated to require food assistance over a nine-month period. The VAC has indicated that in-country food stocks are sufficient to meet the requirements. The VAC has also recommended other rehabilitation (such as the rehabilitation of infrastructure) and developmental interventions to assist affected populations. In Tanzania, 61 districts in 17 regions will not meet total food requirements for the next six months until the next harvest (in bimodal areas), and eight months in unimodal areas. The number of people affected, and the duration and severity of food insecurity, will be determined by the August/September 2009 rapid vulnerability assessment.

In Swaziland, the VAC results indicate a slight improvement since last year as indicated by the reduction in the number of people requiring assistance. Lesotho, on the other hand, projects higher numbers of food-insecure people due to yet another poor season on the back of a particularly bad 2007/08 season. Namibia, for the first time, produced estimates of the food insecure. These are mainly located in the northern crop-growing areas which have suffered floods during the past two years. In these three countries, food prices (especially for maize), which have remained above five-year averages, could lead to increased numbers of people facing food shortages during the hunger season (October 2009 – March 2010).

Table 2. NVAC-estimated numbers of food insecure populations¹

Country	VAC Assessed Number of Food Insecure ²			Cereal Required (MT)
	2007/08	2008/09	2009/10	
Lesotho	553,000	353,000	450,000	25,791
Malawi	63,200	673,498	147,492	6,678
Mozambique	520,000	450,000	247,000 ³	17,289
Namibia	Na	na	224,795	14,703
Swaziland	345,012	287,000	253,383	8,868
Zambia	440,866	444,624	110,651	8,296
Zimbabwe	4,100,000	5,100,000 ⁴	1,400,000 ⁴	107,000 ⁵
Total	6,022,078	7,308,122	2,391,938	180,329

1/ Source: 2007 and 2008 VAC reports and preliminary results as of 15 July 2009.

2/Not separated from populations facing acute/chronic food insecurity

3/ Preliminary estimates based on March 2009 monitoring survey

4/As assessed by ZimVac. The FAO/WFP CFSAM in May 2009 estimate is 2.8 million

5/ZimVac estimates – the CFSAM estimated 190,000 MT

Table 2 summarizes this year's assessments of the number of food-insecure people in the most food-insecure countries in the region and compares them with the previous two years. The table shows a marked regional decline in food insecurity compared to last year. Only Lesotho has registered an increase in the food insecure population, mainly as a result of sustained erosion of livelihood assets and the much below-average harvests this season. The World Food Program (WFP) is expected to continue responding to assessed needs through country-specific Protracted Relief and Rehabilitation Operations (PRROs), most of which began last year (2008). WFP reports at the end of June 2009 suggest that commodity requirements for ongoing assistance through the PRROs will not be fully met in the next six month period (July – December 2009).

Pipeline breaks are anticipated in all commodities. For cereals, these will begin as early as August in Zambia; September in Madagascar and Mozambique; October in Swaziland; November in Lesotho; and December in Zimbabwe (Table 3). Although the main harvests have significantly reduced current requirements for external assistance, localized pockets of food insecurity in most countries will continue to exert pressure on WFP's food aid pipeline. Unless donors increase pledges, pipeline breaks are likely to worsen during the hunger period, when the number of food insecure peaks.

Most likely food security scenario: July – December 2009

The most likely regional food security scenario between July and December should see a continuation of current generally food-secure conditions in most areas, except the areas mentioned above, where shocks have compromised food availability, access, and/or utilization. Generally stable food security in the region over this period is projected based on current food availability, which should be largely sufficient to meet the region's consumption requirements. Most rural households (including the resource poor) will continue to have access to their own food production until the onset of the hunger season (October/November). In Botswana, Lesotho, Namibia, and Swaziland — the structurally grain-deficit (BLNS) countries — the 2008/09 harvests are expected to meet farming households' consumption requirements over the next three months, and from then on, an increasing number will depend on markets. Market-dependent households (including urban populations) are also expected to be able to access adequate food from local markets, as prices are expected to remain stable until the beginning of the hunger season.

Planned commercial imports (especially in the BLNS) are expected to be delivered as scheduled, improving market supplies. Maize prices in South Africa (South African Futures Exchange) are likely to remain low, as indicated by the spot and September futures (quoted for white maize on July 31) at R1,377/MT (USD176) and R1,397/MT (USD179), respectively. Low maize prices will keep food inflation levels down (continuing the recent downward trend), especially in the BLNS, where year-on-year food inflation rates have dropped significantly compared to the same time last year. This situation is expected to contribute to stable food security conditions in the outlook period.

Income-earning opportunities for market-dependent households are likely to be normal over this period, given the good harvest that will enable better-off households to hire agricultural labor (for ploughing and planting) at the start of the 2009/10 cropping season from September onward. In addition, the good rains received during the winter months have improved pasture and livestock conditions. Livestock prices are likely to remain stable during this period, as fewer households will need to sell to access money for staple foods. However in the October to December period, prices of small stock (goats) and chickens will start falling, as increasing numbers of poorer households begin in order to purchase food.

Although El Niño conditions are developing over the south Pacific, we expect the onset of the 2009/10 rainfall season to be timely, providing agricultural labor opportunities and much-needed income to purchase food. The upcoming Southern Africa Climate Outlook Forum (SARCOF) in September will provide indications of 2009/10 rainfall outlook for the region. With the timely onset of the

2009/10 rainfall season, which normally starts in mid-October, pastures and livestock condition are likely to improve. In crop-growing areas, casual agricultural labor opportunities will increase, providing much-needed income, and improving purchasing power and food access.

Even though the October to December period marks the first half of the hunger season and food prices start to peak, the adequate own production by many rural households, as well as the income earning opportunities from agricultural labor for market-dependent households will ensure adequate access through most of this period. Deliveries of planned commercial imports of staple foods (especially maize from South Africa) will act as a buffer to rising prices and depleting on-farm stocks. This phenomenon will be more significant in the traditionally grain-deficit BLNS countries (but also in Zimbabwe), where national food requirements are always augmented by commercial imports.

The exception will be among households facing food shortages and those that are chronically vulnerable to food insecurity in rural and urban areas. These households (most of whom had only produced enough to last for three months) will remain moderately food insecure until September as a result of current government and humanitarian mitigation measures and

Table 3. Cereal pipeline requirements for July–December 2009 for WFP Southern Africa PRROs (MT)

	Cereals		All commodities	
	Requirements	Shortfall	Requirements	Shortfall
Lesotho	4,644	-1,119	7,441	-2,031
Madagascar	2,622	-6,093	5,058	-8,053
Malawi	3,234	-74	9,830	-977
Mozambique	14,010	-13,580	23,528	-17,321
Swaziland	4,518	-2,042	6,789	-4,196
Zambia	4,782	-4,871	6,687	-6,277
Zimbabwe	66,930	-6,030	74,606	-10,715
TOTAL	100,740	-33,809	133,939	-49,570

Source: World Food Program (OMJ)

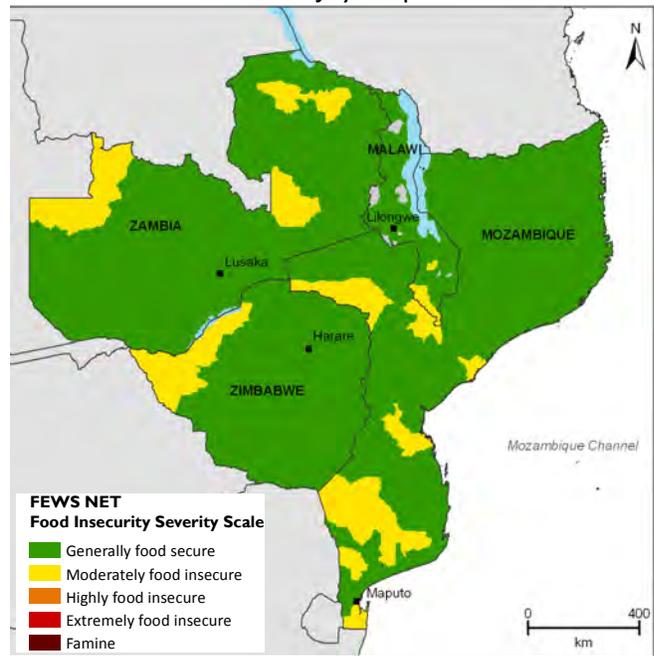
(for some) access to own produced food. However, from October to December, it is likely that these conditions will deteriorate: more people will slip into moderate food insecurity while others become highly food insecure as the little that was produced is depleted, and if government and humanitarian mitigation efforts do not receive additional resources (see WFP pipeline data –Table 3).

Flood affected areas (July – September): Most areas that experienced excessive flooding, leading to disruptions of livelihoods and crop failure, already need humanitarian food aid. Most affected are the poorer households, with little or no income to purchase available foods on the market. Casual labor opportunities have been reduced significantly, as the better-off households have also been affected by the floods. The affected areas stretch from the Zambezi West Bank livelihood zone in Zambia (especially the Chavuma, Zambezi, Kabompo, and Mwinilunga districts) through northern Namibia, southern Angola, northern Botswana, and northern Zimbabwe. The recent vulnerability assessments in these countries have identified a significant number of populations 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.

Drought/extended dry spell affected areas (July – September). Currently, many households in these areas are increasingly relying on markets to meet their food needs due to poor harvests this season. However, due to low food production, market prices are much higher in local markets than the same time last year and the five-year average (see annex), a situation likely to limit adequate food access by the poor households with limited or exhausted food stocks. In some of these areas, negative coping strategies are likely to increase, as poor households battle to get income for food purchases. The most affected areas include the Lower Shire in southern Malawi (Chikwawa and Nsanje districts), Kariba, Hwange and Binga districts in Zimbabwe, parts of Tanzania’s bimodal areas (northern, northeastern, and coastal areas) and unimodal areas (central zone). In Mozambique, they include northern Maputo, southern Gaza provinces (southern region), and southern Sofala and southern Tete provinces (central region).

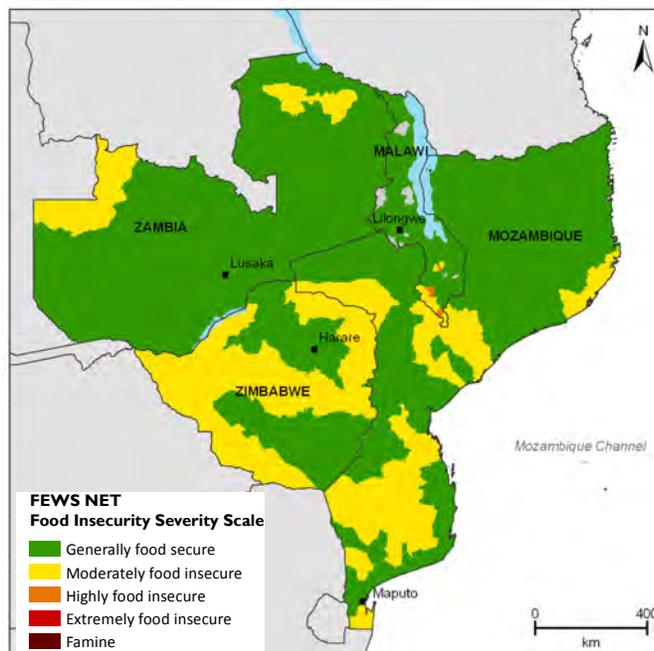
In Tanzania, the failed *vuli* and *masika* rains in the bimodal areas resulted not only in crop failure, but also in poor pastures. This is likely to cause abnormal migration of pastoralists into the northern and northeastern parts of the country, putting pressure on the available pasture, which may trigger conflict between the pastoralists and

Figure 2. Most likely food security conditions in FEWS NET countries in Southern Africa, July - September 2009



Source: FEWS NET

Figure 3. Most likely food security conditions in FEWS NET countries in Southern Africa, October – December 2009



Source: FEWS NET

crop farmers.

The number of food insecure people is likely to increase in these areas, as food prices are expected to continue rising if not enough food is moved from surplus to deficit areas. Second-season harvests (expected in August) in southern and central parts of Mozambique will bring some relief for the affected households, although prospects are not very good, given the early cessation of the main season rains.

Flood/Drought/Extended Dry Spell Affected areas (October – December): Food insecurity is likely to start deteriorating, with some moderately food insecure populations slipping into the highly food insecure category. By this time, most households will have exhausted their stocks from their own production and will depend on the market for their food needs. As a result, food prices are likely to rise, making food access more difficult for many households, especially the resource-poor. In the affected parts of the Lower Shire in Malawi, households in lowland areas along the Shire River may experience a slight improvement from October to December due to winter crop harvests. However, this is likely to be short-lived even for these households, as winter cultivation is limited.

Although the timely onset of the 2009/10 rainfall season will provide agricultural labor opportunities, better-off households in these areas will not have sufficient means to hire casual labor, therefore limiting the amount of income that the poorer households could earn from hiring out their labor. Nonetheless, with the timely onset of rains, pastures and livestock condition will improve, giving some relief to pastoralists (in Tanzania) and livestock (in general).

By October, all those currently assessed as moderately food insecure will require food assistance. WFP, governments, and partners (including C-SAFE in Zimbabwe) will continue to provide assistance from current pipeline stocks and pledges. However, more funding will be needed to cover the assessed food needs. The peak hunger period will be around December/January.

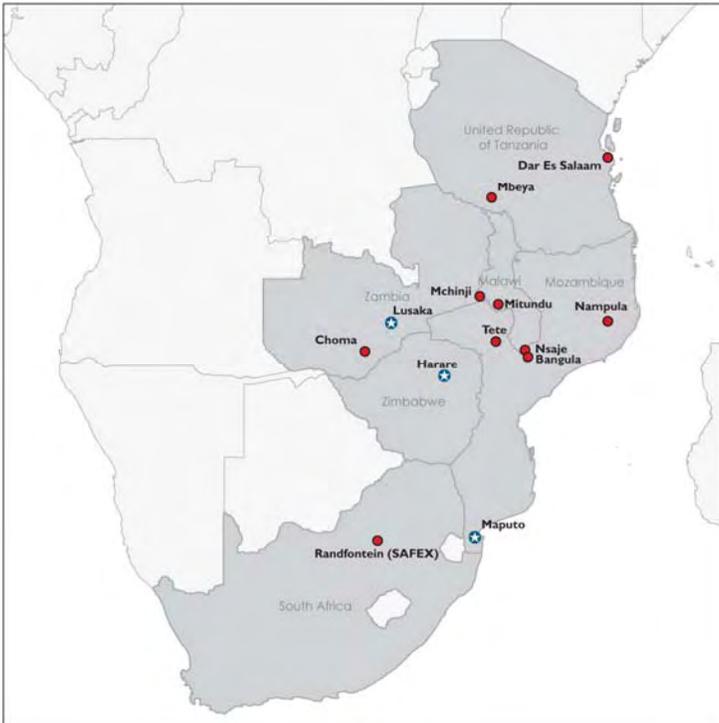
Table I. Events which could change the most likely food security scenario

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	Influx of local traders buying maize for resale	Reduced supplies on markets, steep increases in food prices result in limited access to adequate food	Unlikely	Market supplies
	Unrestricted formal cross border trade in Malawi, Zambia and Tanzania	Increased maize movement across borders increasing supplies and reducing local market prices.		Trader licenses issued
	Increase in South African maize prices	Food import bills increase reducing capacity to import sufficient quantities		SAFEX prices
Malawi (Lower Shire Livelihood Zone)	Ban on private trader participation in maize trading	Reduced movement of food from surplus to deficit areas of the Lower Shire, further limiting supplies and spiking local market prices.	Unlikely	Market maize supplies, trader licenses issued, cross border volume
	Maize export ban imposed by Mozambique	Reduced volumes of informal cross border trade limits supplies in southern Malawi and further increases local prices.	Unlikely	
Zambia (Flood-affected)	Reduced off-season planting due to	Reduced food availability could increase the number of poorer	Unlikely	Off-season crop

areas in Western, Northwestern, Central, and Eastern provinces)	inadequate inputs	households requiring assistance		conditions
	Abnormally high cereal prices	Reduced access to food especially for poorer households whose income from labor sales will be inadequate to purchase expensive food	Unlikely	Maize and maize meal prices
	Reduced livestock prices	Reduced income from livestock sales will reduce market access and livestock terms of trade	Unlikely	Livestock prices
	Low labor opportunities October-December	Increased numbers of people unable to work in exchange for food and therefore increased numbers of those requiring assistance	Unlikely	Start of season, labor demand
Tanzania (Lake Victoria Zone, Mara, and Mwanza regions)	Infestation and spread of cassava mosaic and brown streak diseases slows down	Reduced vulnerability to food insecurity due to increased cassava production – a staple in Mara and Mwanza and a buffer in the Lake Victoria zone	Unlikely	Rate of spread of cassava mosaic and brown streak diseases
Tanzania (bimodal areas)	Increased livestock prices and labor migration	Pastoralists will earn substantial income from livestock sales and buy grain	Unlikely	Livestock prices, migration levels
Tanzania (cotton areas in Mwanza, Shinyanga, Mara, Kagera, and Tabora regions)	Enhanced market opportunities for cotton	Income earned from cotton sales will improve food access for market-dependent households.	Unlikely	Cotton market and cotton prices
Mozambique (southern Tete, northern and southern Sofala)	Staple food prices fall significantly	Increased food access for market-dependent households, especially poorer households.	Unlikely	Staple food prices
	Increased livestock prices	Deteriorating terms of trade (livestock/cereal) reduces food access for households keeping livestock	Unlikely	Livestock prices, terms of trade
	Inadequate humanitarian assistance	Targeted food insecure populations are unable to meet food requirements and/or inputs required for the upcoming season	Unlikely	Food aid pipelines, progress of input support programs
Zimbabwe (Rural areas with own production lasting until December)	Cost of non-food services (education, health, milling costs, transport) remains stable and affordable	Available household food stocks remain stable as there will be less bartering for the services	Highly Unlikely	Transport fares, milling cost, education and health fees
Zimbabwe (Urban centers)	Restriction on cheaper maize meal imports from South Africa, Botswana, and Zambia	Reduced supply of maize meal; increased maize meal prices and reduced food access for market-dependent households	Unlikely	Import regulations; maize, maize meal prices
Zimbabwe (All areas, particularly urban)	Cholera outbreaks controlled, no further outbreaks	Nutritional status will improve as food utilization improves and number of and deaths from the disease will decline.	Unlikely	Cholera case surveillance
Zimbabwe (Communal areas,	Livestock disease outbreaks and veldt	Increased contribution of livestock to food access for households	Unlikely	Livestock disease

particularly in Matabeleland provinces)	fires controlled	dependent on livestock		surveillance, grazing conditions
Zimbabwe (Central, Northern, and Western districts)	Cotton lint prices are attractive	Increased household income for those dependent on cotton production	Unlikely	Cotton prices

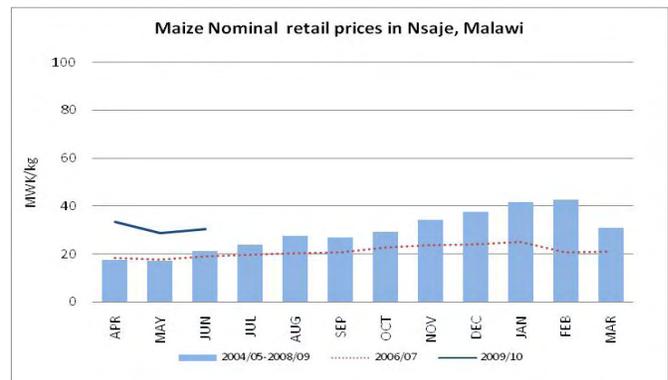
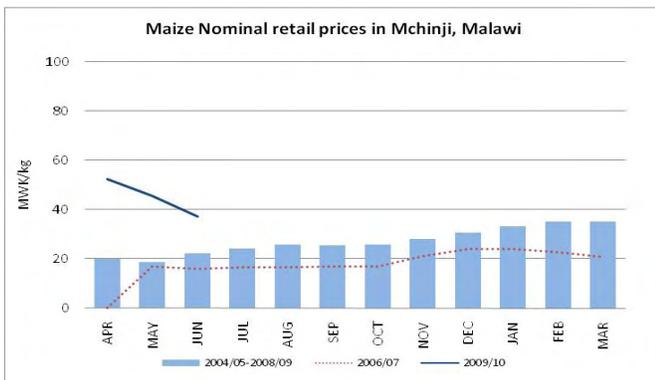
The Southern Africa Food Security Update draws from the FEWS NET monthly food security reports, with additional contributions from network partners including FEWS NET/USGS, the SADC Regional Remote Sensing Unit, SADC Regional Early Warning Program – Gaborone and the SADC Regional Vulnerability Assessment Committee comprised of SADC FANR, FAO, WFP, FEWS NET, SC (UK), and OCHA. Additional information is drawn from the national early warning units and meteorology services in SADC member states.

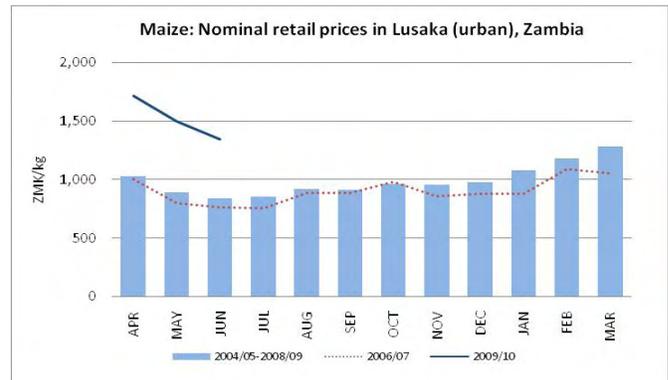
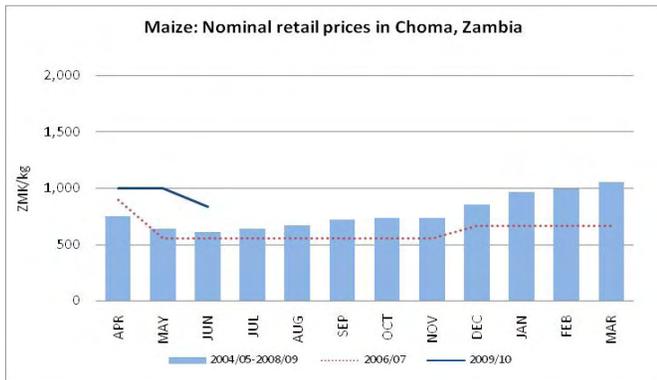
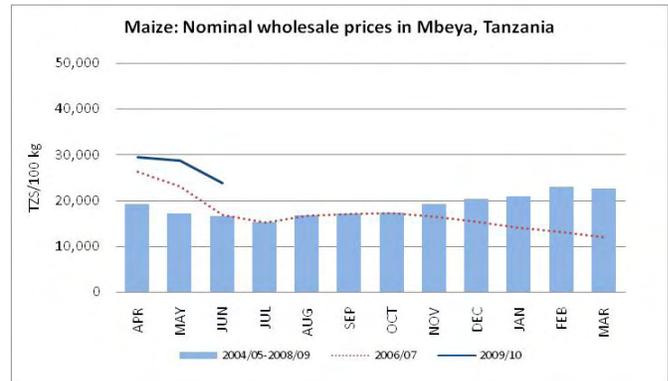
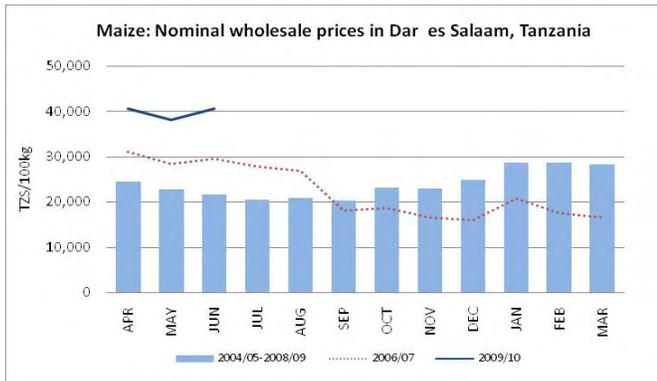
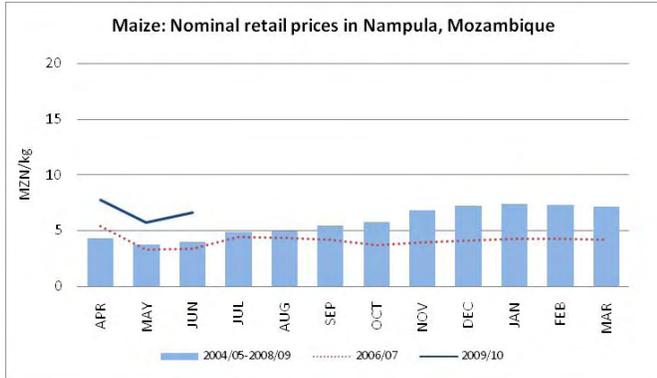
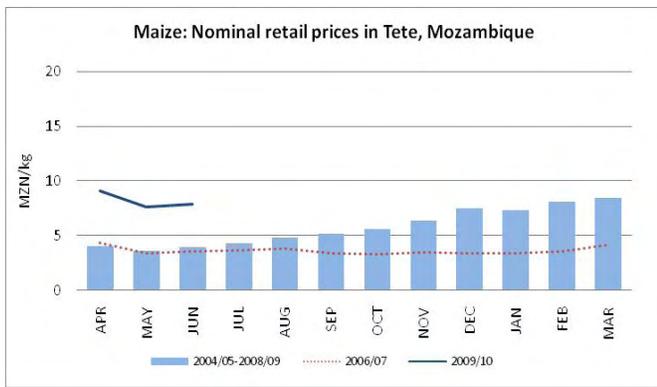


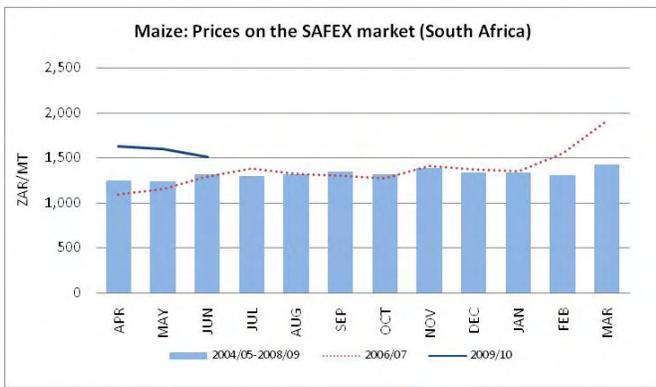
Monthly prices are supplied by FEWS NET enumerators, local government agencies, market information systems, UN agencies, NGOs, and other network and private sector partners.

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.

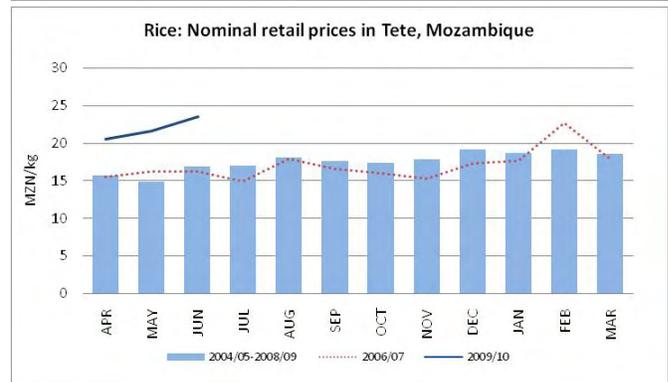
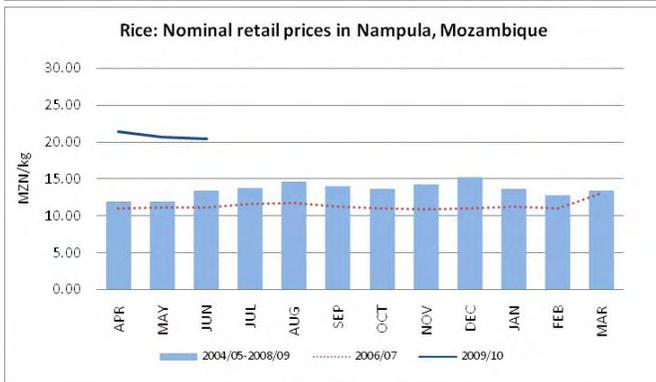
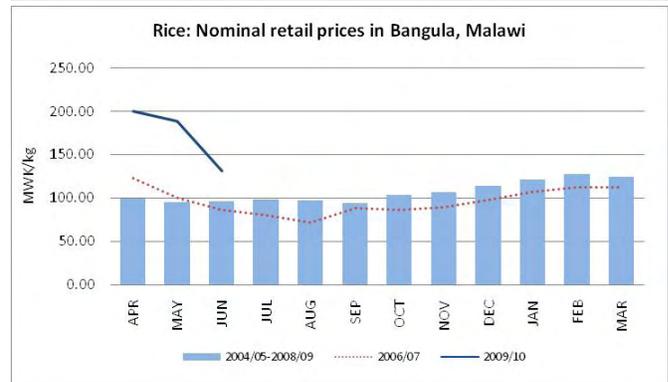
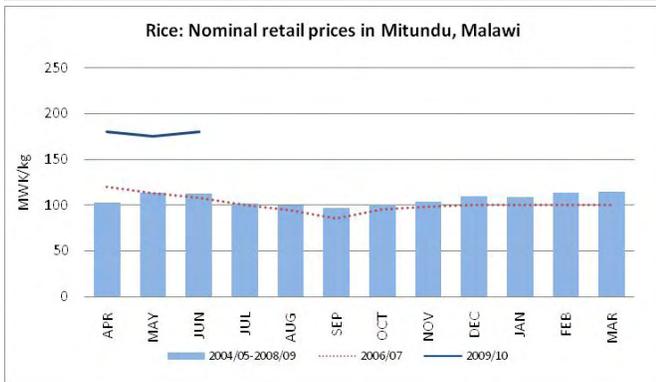
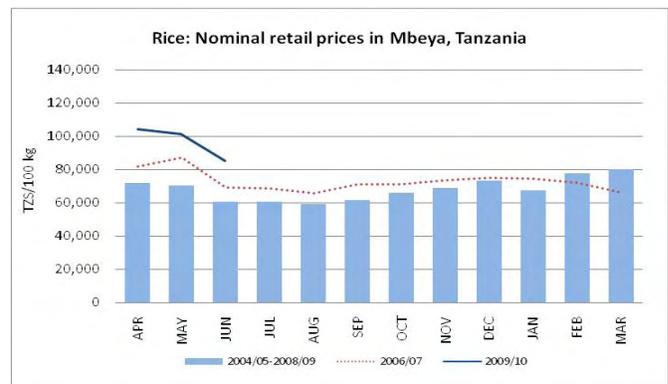
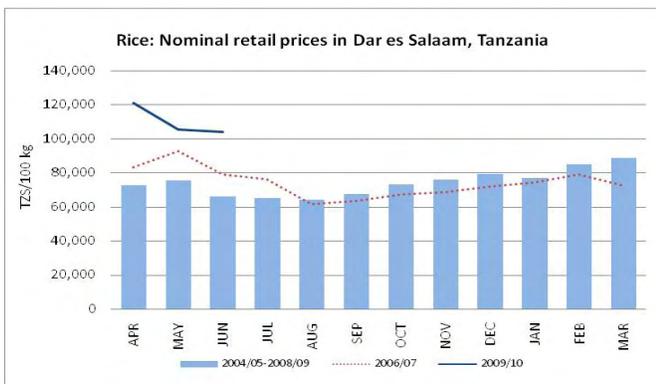
MAIZE: The markets below represent the major markets — both production and consumption— within each country in the region in addition to the SAFEX spot market prices in South Africa.

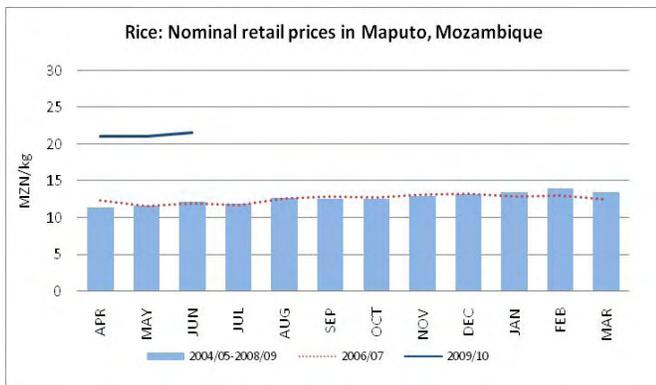






RICE: The markets below represent the major markets — both production and consumption— within each country in the region.





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.

