SOUTHERN AFRICA
Food Security Outlook

April through September 2011

Beginning in April 2011, FEWS NET is transitioning to the Integrated Food Security Phase Classification's (IPC) Household-based Acute Food Insecurity Reference Table, which is scheduled for release with IPC version 2.0 in July 2011. For more information see: www.fews.net/FoodInsecurityScale.

Key Messages

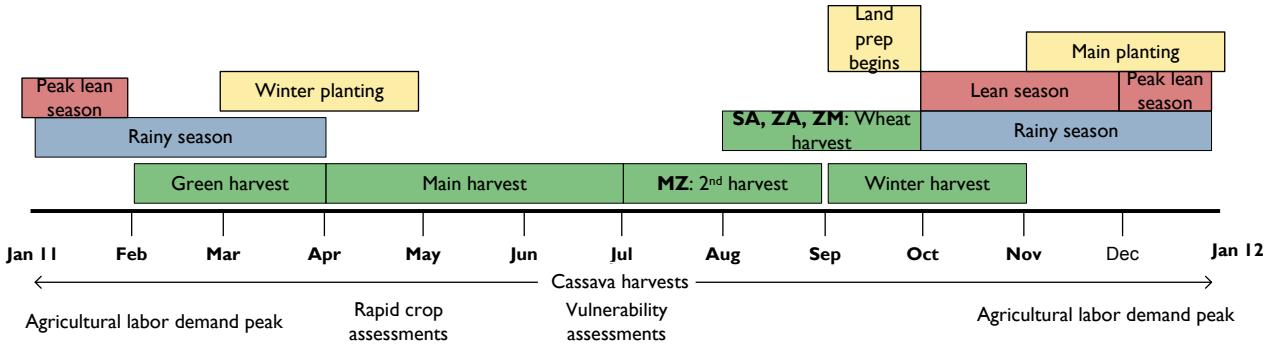
- Food security conditions over most parts of the Southern Africa Development Community (SADC) region remain satisfactory and conditions are expected to remain so throughout the outlook period. The projected average to above-average maize harvests are assessed to be sufficient to meet the region's requirements for the next six months and beyond. Current reports indicate that household food access has improved and food security has been enhanced, particularly in those areas which benefited from favorable rainfall. Increased on-farm food supplies have eased the pressure on local markets and prices have stabilized, and in some cases, started dropping.

- The total regional cereal availability is expected to remain near the levels reached last season. This is despite slight production declines in some countries that were impacted by floods and/or dry spells. In the main maize producing countries harvests will be complemented by larger carryover stocks on account of the bumper harvests from last season. South Africa is expecting a carryover of more than 2.65 million metric tons (MT), while Zambia and Malawi have also reported significant formal and on-farm closing stocks. All three countries are also expecting sizable exportable surpluses in 2011/12.

- Despite generally satisfactory national food availability, localized areas of concern exist where shocks to livelihoods have compromised food availability and access including areas of northern and southern Malawi, the semi-arid districts of southern and central Mozambique, parts of southern Zimbabwe, and northeastern and central Tanzania. Grain will have to be moved from surplus to deficit areas, imported commercially (formally or informally), or distributed as food aid to cover the needs of populations facing food shortages.

- While many parts of the region (especially those along major river basins) were affected by excessive rains and floods, in Lesotho and northern Namibia the impacts on crop production and livelihoods were most severe and more widespread. Both countries have appealed for international assistance to cover the needs of affected populations. Ongoing food security and vulnerability assessments across the region, which should be completed by June/July, will better inform decisions on interventions and response strategies required over this outlook period and beyond.

Seasonal calendar and critical events timeline



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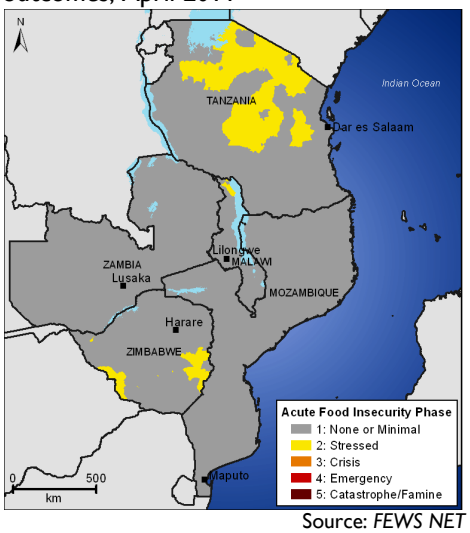
Current food security conditions

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

Figure 1. Current food security outcomes, April 2011



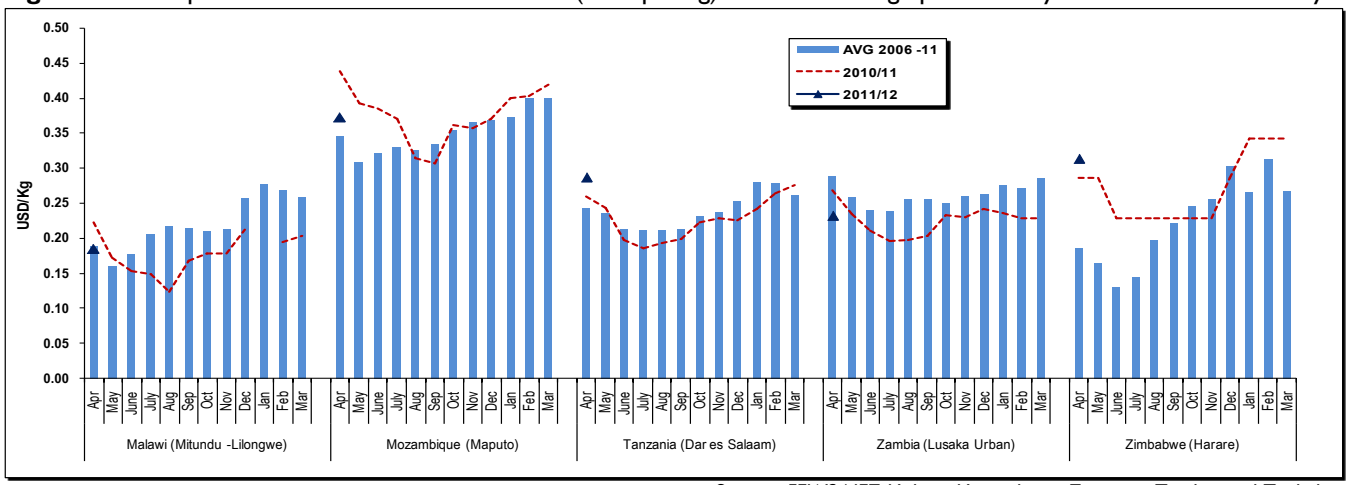
Source: *FEWS NET*

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

By April, staple food prices in most markets had stabilized and had started decreasing. Most markets were reported to be adequately stocked with this season's green and early harvests as well as last season's stocks which traders have been off-loading in preparation for this season's new crop. Persistent price increases have been observed only in some markets in Tanzania mainly as a result of the failed *vuli* season and the poor performance of the *msimu* and *masika* rains. Elsewhere, staple food prices are expected to continue to decline until the end of the harvest period (July/August) when prices should stabilize before rising again as the lean season approaches. In general, maize prices are below the April 2010 levels confirming reports of improved food supplies, however prices are still above the five-year average. Exceptions are noted in many markets of Tanzania where the April prices remain above both the five-year average and last year. In Mozambique, while prices are following the normal trend, they remain significantly above the five-year average, which is also much higher when compared to price levels in key markets in neighboring countries (Figure 2).

While, in general, the current food security situation is progressively improving, there remain localized areas of Stressed (IPC Phase 2) food insecurity conditions in almost all countries in the region. This is exemplified by current (April/May) conditions in the five FEWS NET presence countries in the region where more detailed information exists to enable food insecurity severity mapping (Figure 1). Reasons for these conditions include: effects of the December/January floods and/or the February/March prolonged dry spells, which have delayed the availability of early foods, forcing households to still rely on local markets and/or food distributions from on-going assistance programs. Some affected areas, such as those in southern Malawi (the Lower Shire Livelihood Zone), the semi-arid districts in south and central Mozambique, parts of Zimbabwe, southern and western Zambia, and the northern and north eastern pastoral areas of Tanzania, have faced consecutive years of poor harvests due to erratic rainfall, drought, and/or flooding.

Figure 2. Retail prices of maize in selected markets (USD per kg) based on average prices in key markets in each country



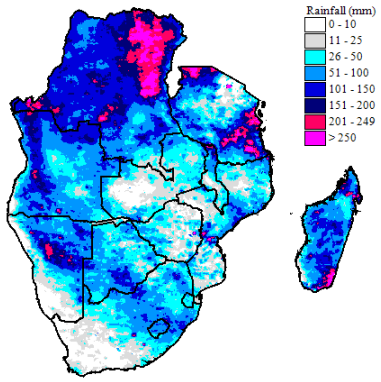
Source: *FEWS NET Malawi, Mozambique, Tanzania, Zambia, and Zimbabwe*

Some vulnerable households in these areas have been receiving food assistance which has helped to mitigate food insecurity. Resources for this assistance vary from country to country. In Zimbabwe, where despite the much larger case load of beneficiaries, reports from the World Food Programme (WFP) indicate an adequate food aid pipeline for the upcoming six months. In Malawi, the government and partners provided maize to assist some (but not all) targeted populations up to March. These households are now depending on carryover food aid and their meagre harvests, all of which will most likely run out by July. It is only in Mozambique that under-resourcing remains a serious concern with WFP reports indicating significant pipeline breaks beginning in May. Assistance is being provided to some, though not all, of the vulnerable households identified as food insecure during the last assessment of the Technical Secretariat for Food Security and Nutrition/Vulnerability Assessment Group (SETSAN/GAV). Urgent action is required to secure additional donor resources and to immediately increase food distribution to all targeted beneficiaries in order to avert prolonged food insecurity. In the flood-affected areas of northern Malawi (Karonga district) and the northern regions of Namibia and Lesotho, emergency interventions and responses have occurred to meet immediate needs of affected populations. More detailed information is expected from the various assessments that have been carried out including the on-going food security and vulnerability assessments, better informing the medium and long-term programming decisions.

Seasonal progress and harvest expectations

Although the April rains over some parts of the region have been good for pasture regeneration, they have led to concerns about the impact on the mature maize awaiting harvest. For the most part, field reports indicate that the rains have been more beneficial than detrimental. However, much of southern Malawi, southern Mozambique, Zambia, and Zimbabwe were primarily dry in April with scattered rainfall in some areas. Many parts of southern Mozambique and southern Zimbabwe have been dry since February, and the continued dryness is likely to have an impact on water and pasture availability in these areas, as well as in low-lying areas of southern and central Mozambique where a second cropping season is normal.

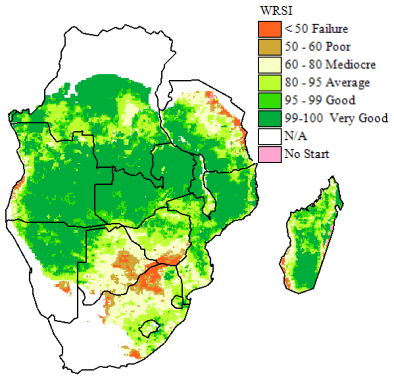
Figure 3. Rainfall for April 2011 (mm)



Source: *USGS/FEWS NET*

The water requirement satisfaction index (WRSI) was modeled to obtain an indication of potential crop performance based on water availability (Figure 4). The model was modified to account for late plantings reported in some areas including southern Malawi and southern Zimbabwe, and variations in crop cycle length due to elevation differences. The model suggests that several areas were significantly impacted by insufficient rainfall including northern South Africa, southern Zimbabwe, and northern Tanzania. Parts of southern Malawi were also negatively affected. As a result, permanent wilting occurred in some of the affected areas. In contrast, several areas received sufficient rains to get a good harvest, including much of Zambia, northern Mozambique, northern Malawi, northern Namibia, and central Zimbabwe. The model does not account for excess moisture which could result in either flooding or water logging.

Figure 4. Water Requirement Satisfaction Index (WRSI) as of 30 April 2011



Source: *USGS/FEWS NET*

Harvest Prospects

South Africa, Malawi, Mozambique, and Zambia are anticipating harvests that are close to, or above, their respective five-year averages. This level of production, which, with the exception of Malawi and Zambia, is similar to or slightly below, last year's levels, has been achieved despite the adverse impacts of excessive rains and floods and mid-season dry spells. Although official crop estimates have not yet been released in most countries, field reports support these projections.

As usual, the largest cereal harvest is expected in South Africa (Table 1), which on average contributes 40 to 45 percent of the region's total production. Following the 14 percent reduction in the area planted (in response to the over-supply of maize), total production also dropped 14 percent even after the impacts of the excessive rains and dry spell. The latest production forecast (as of April 20th) estimates a

South African maize crop of 11.49 million MT, or eight percent above the five-year average of 10.62 million MT. The bulk of the rest of region's maize comes from Malawi, Tanzania, Mozambique, and Zambia – countries which in good years produce more than sufficient quantities to meet their own domestic requirements and leave sizable exportable surpluses. In the past five years these four countries have produced over 90 percent of the harvest of all countries excluding South Africa. In all four countries more favorable prospects were diminished by localized weather shocks as described above. In April, Malawi had issued a forecast based on the second round estimates suggesting a total maize crop of 3.85 million MT. This figure is 13 percent above last year's bumper harvest of 3.42 million MT because the effects of drought and flooding experienced in the southern area of the country were less severe this year. In May, Zambia also issued its crop estimates which indicated that maize production was eight percent above last year and 69 percent above the five-year average. Qualitative estimates from elsewhere suggest that production levels are slightly less (Tanzania) or the same (Mozambique) as those achieved last year.

Elsewhere in the region, and especially in the BLNS countries (Botswana, Lesotho, Namibia, and Swaziland), current projections also suggest that crop production has been considerably impacted by the excessive rains, floods, and droughts. With the exception of Swaziland, harvests are estimated to be below last year's levels, especially in areas where floods had a more severe impact this year. Similarly, production prospects in Zimbabwe have been diminished by the mid-season dry spell despite earlier favorable expectations related to good rainfall performance in the first half of the season and the improved availability and access to inputs, especially seeds and fertilizer. Nonetheless, current projections based on the recent government crop survey suggest an improved cereal harvest (maize and small grains) that is six percent above last season's 1.52 million MT. This still indicates a production level that is 34 percent above the five-year average for these crops.

Table 1. SADC regional preliminary production forecasts: 2010/11 compared to 2009/10 ('000 MT)

	Maize			All Cereals		
	09/10	10/11	% Change	09/10	10/11	% Change
South Africa	13,421	11,489	-14	15,094	13,301	-12
Other SADC*	15,943	15,170	-4	19,903	18,719	-5
TOTAL	**29,364**	**26,659**	**-9**	**34,996**	**32,020**	**-8**

* Excludes South Africa, DRC, and Madagascar.

Source: *SADC National Early Warning Units and Central Statistics Office*

Most likely regional food security scenario

In view of the dependence of households on the agricultural cycle and related activities, the evolution of food security conditions in the outlook period will largely be determined by the size of the main season harvests (and where practiced - the second season). Consequently, because of the current harvest expectations, the most likely food security scenario for the SADC region between April and September should see a continuation of the current generally food secure conditions in most areas, except where shocks such as floods and dry spells have compromised food availability, access, and/or utilization. The outlook of generally stable food security in the region is projected based on the forecasts of average to above-average cereal harvests which should be largely sufficient to meet the region's consumption requirements for the next six months and beyond. Preliminary regional maize supply/demand projections for the 2011/12 marketing year suggest that maize availability (boosted by the bumper harvests and large carryover stocks from South Africa) will meet the region's needs and will leave a surplus that could be exported outside of the region. Although maize imports will not generally be critical to meet requirements in the six months of this outlook period, traditional importers of South African maize (primarily the BLNS countries) will benefit from the current maize price levels on the South African Futures Exchange (SAFEX) which are trending below the increasing international prices. This will enhance access for many of the poorer farming and non-farming households who normally depend on markets to access food shortly after the June harvest period.

At the sub-national level, most rural households will have access to their own food production until the onset of the next lean season (October/November). Even in the marginal grain production areas, the April/May harvests are expected to meet farming household consumption requirements over the next four to six months. Once own production is exhausted these households (and those that are market-dependant) are expected to be able to access adequate food from local markets, as prices are expected to continue to decline, remaining stable until the beginning of the lean season. Market supplies are expected to remain good across the region due to expected good harvests and modest carryover stocks from last year. However, staple food prices are expected to stabilize at levels above the five-year average due to increased

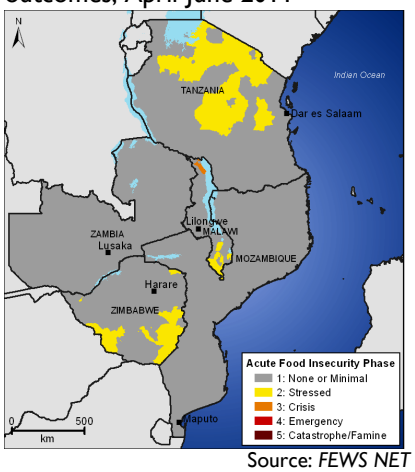
transportation costs and high input costs being incurred by most farmers in the region. SAFEX prices in South Africa are expected to continue tracking international price trends and to remain above their recent five-year averages.

Notwithstanding the generally food secure outlook outlined above, in identified areas of concern (mapped in Figures 5 and 6 for the five countries for which FEWS NET has a presence and collects data), food insecurity conditions are assessed for vulnerable households in areas that are facing food shortages as a result of poor harvest prospects due to weather related shocks and/or marginal productivity of the land. These areas include: northern, northeastern, and central areas of Tanzania due to poor *vuli* harvests in most parts of bimodal areas and the poor performance of the *msimu* rains in the unimodal areas; the flood-affected and mid-season drought-affected areas of central and southern Mozambique; the western and southern districts of Zimbabwe (Masvingo, Manicaland, Matabeleland South, and Midlands provinces); the extreme southern and western parts of Zambia (Gwembe and Luangwa Valleys); and the southern districts of Malawi (Mangochi, Machinga, Balaka, Neno, Mwanza, Blantyre, Chiradzulu, Thyolo, Mulanje, Zomba, Balaka, Chikhwawa, and Nsanje) and parts of the flood-affected district of Karonga in northern Malawi.

Some households in these areas of concern (especially the very poor and poor) are currently facing Stressed (IPC Phase 2) food insecurity conditions and are estimated to remain so through the outlook period unless external assistance is provided and/or scaled up. It is only in Malawi (Karonga district and some of the southern districts) that the food security conditions are likely to deteriorate to Crisis (IPC Phase 3) in the second half of the outlook period from July through September if a lack of assistance persists. Households will then have to employ not only the coping strategies that are normal for this time, but also crisis coping strategies that could further erode their livelihoods.

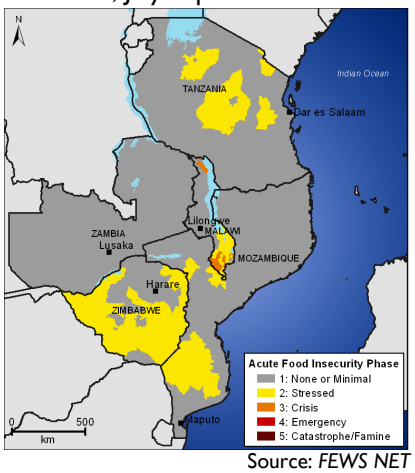
Results from the annual vulnerability and food security assessments that will be conducted in May/June will provide more detailed information that will assist decision makers in determining the level of support required by affected households and the timeframe in which assistance will be required.

Figure 5. Most likely food security outcomes, April-June 2011



Source: *FEWS NET*

Figure 6. Most likely food security outcomes, July-September 2011



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