

MOZAMBIQUE Food Security Update

April 2007

Summary

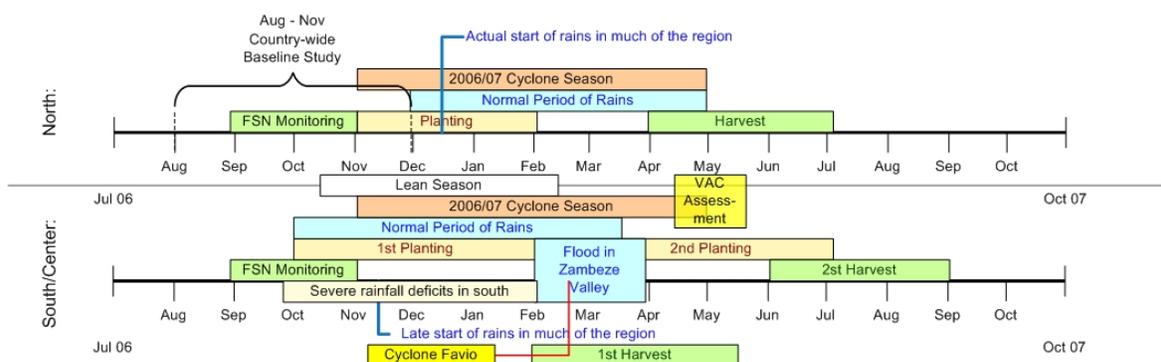
As the seasonal harvest progresses, food availability and access is improving for most households, and food security is relatively satisfactory. In the flood affected areas of the central region, around 147,000 people will continue to benefit from emergency food and non food assistance until June. The results from the national Vulnerability Assessment Committee (VAC) and the progress of the second season will determine if further assistance is necessary beyond June. In drought affected areas of the south, despite the poor first cropping season, most households are expected to be able to cope with the anticipated food deficits, and consumption patterns are considered adequate. Cassava and cow pea production may be able to compensate for poor maize production that was compromised by rainfall deficits.

Across the country, food prices are generally below average and declining, as is normal for this time of the year. Later in the marketing year, prices in southern Mozambique could begin to rise significantly as poor maize production and high maize prices in South Africa might encourage local millers and brewers to source their maize from Mozambican markets that are not normally used to meeting this demand.

Previous rainfall analyses have shown that the southern region received less than 70 percent of normal rainfall during the first half of the season (October-December 2006), negatively affecting the normal start and development of the main agricultural season. However, from the third decade of March, normal to above normal rains started occurring in much of the south and parts of the central region. These later rains have been favorable for second season planting and growing conditions. Agriculture inputs were made available in the areas affected by hazards this season, including the flood affected areas of the Zambeze valley, areas hit by cyclone Favio and some of the drought affected areas in the south. Input trade fairs (ITFs) implemented by the Ministry of Agriculture in partnership with FAO and NGOs provided seeds and tools to affected households.

Beginning in late April, the Technical Secretariat of Food Security and Nutrition (SETSAN) Vulnerability Assessment Group (Group) is leading the annual vulnerability assessment in the areas most affected by recent hazards including drought. The results will inform decision makers on priorities and interventions for the rehabilitation phase, as well as updated food security scenarios previously developed as new information will be available.

Seasonal Timeline



Current food security situation

In most of the country, particularly the central and northern regions, newly harvested maize is gradually coming onto the market, improving local food availability. In the south, some of the maize available in the south still consists of stocks from 2005/06 production, and is supplemented by some newly harvested maize from central and northern regions. As the seasonal harvest progress, rainfall continued in several places, and is likely to compromise the harvest. For grain to dry properly, it is essential that the humidity levels decline. In flood affected areas of the central region, households are benefiting from emergency food and non food assistance until next June. With flood recession in the Zambeze valley, households have started to take advantage of the residual moisture by preparing the fields and planting for the second season. This activity is however dependent on agriculture inputs availability of the households known to have lost part or all of their assets, including agricultural inputs. As noted before, the populations in Zambezi Valley live from subsistence agriculture and fishing. A majority of households are very poor and apart from houses, household assets typically include their clothing, agricultural tools, and items of their own manufacture, such as clay pots, sleeping mats, or occasionally pieces of locally manufactured furniture.

Apparently, in the southern region of Mozambique, where drought limited the extent of first season planting and crop growth, the food security situation is still considered satisfactory. Most of the families in this region are normally able to cope with likely food deficits through food purchases with income derived from remittances and sales of chicken, goats and alcohol, and consumption patterns are adequate. Widespread and significant food deficits expected in the drought stricken areas (interior of Gaza and coastal Inhambane provinces and Maputo province, as well as remotely located areas across the southern and central provinces) may not materialize. However, the poorest households in those areas are expected to face food deficits later (around July/August). With the improved rainfall in previously drought affected areas, second season planting is underway and promising, and will help compensate for the failure of the main season.

To date a number of factors have possibly contributed to minimize the negative effects of the rainfall deficits on household food security in the south. First, field reports suggest that cassava and cow peas, other main staple and drought-resistant crops, have both fared relatively well despite the poor rains. Secondly in some areas, fishing and livestock activities are important alternative sources of food and income, helping to offset the negative impact of crop losses on the annual household food basket. Third, markets had more or less stable supplies as a result of the superior harvest last year, and food prices have generally been affordable. Furthermore, households living close to the national road No1 (EN1) can benefit from informal trade, both as consumer and traders.

To support the ongoing second season in the flood and cyclone affected provinces of Mozambique, FAO, with emergency funds and NGOs (Action Aid, Save the Children, Cáritas and OSEO/ASB) with their own funding assisted households with second season planting that began in April. Over 70,000 households in various provinces benefited from the input trade fairs. World Vision distributed kits to households in remote areas where it was not possible to hold ITFs. Over 90 percent of the ITFs planned were implemented between April 2-18 – in time for second season planting – through 51 ITFs in 21 districts. Beneficiaries were able to choose required inputs among a range of agricultural inputs. A decision passed by the Disaster Management Coordinating Counsel chaired by the Prime Minister on April 5-6 advocated for the immediate implementation of ITFs with government funding in the drought affected provinces in the south to support the second agricultural season.

The national GAV is leading the annual round of vulnerability assessment in the areas most affected by recent hazards, including drought, beginning in late April. This assessment will be carried out through a survey of approximately 3,600 households in 39 districts in the central and southern provinces. The questionnaire will evaluate the nutritional status of children and the overall food security situation in the most affected areas. The assessment will project the food security and nutrition conditions for the

Table 1. Provinces and districts visited by the VAC

Province	Districts
Maputo	Boane, Magude, Matutuine, Moamba, and Namaacha
Gaza	Bilene-Macia, Chibuto, Chigubo, Chicualacula, Chokwe, Guija, Mabalane, Mandlakazi, Massangena, Massingir and Xai-Xai
Inhambane	Funhalouro, Govuro, Homoine, Inharrime, Jangamo, Mabote, Massinga, Morrumbene, Inhassoro, Panda, Vilanculos and Zavala
Sofala	Buzi, Caia, Machanga, and Marromeu
Manica	Tambara
Tete	Magoé, Mutarara, and Zumbo
Zambézia	Chinde, Mopeia and Morrumbala

remainder of the consumption year and recommend adjustments to interventions as necessary. Food security indicators (coping strategies index, consumption and dietary diversity, sources of income) and nutrition data (anthropometric measures and demography) will be analyzed in an integrated form. Results are expected in the end of May or early June. The provinces and districts visited are listed in Table 1.

The results of the assessment will also inform the decision makers on priorities and interventions for the rehabilitation phase, after the floods recede. It will also be useful to update food security scenarios previously developed as new information will be available.

Seasonal rainfall update

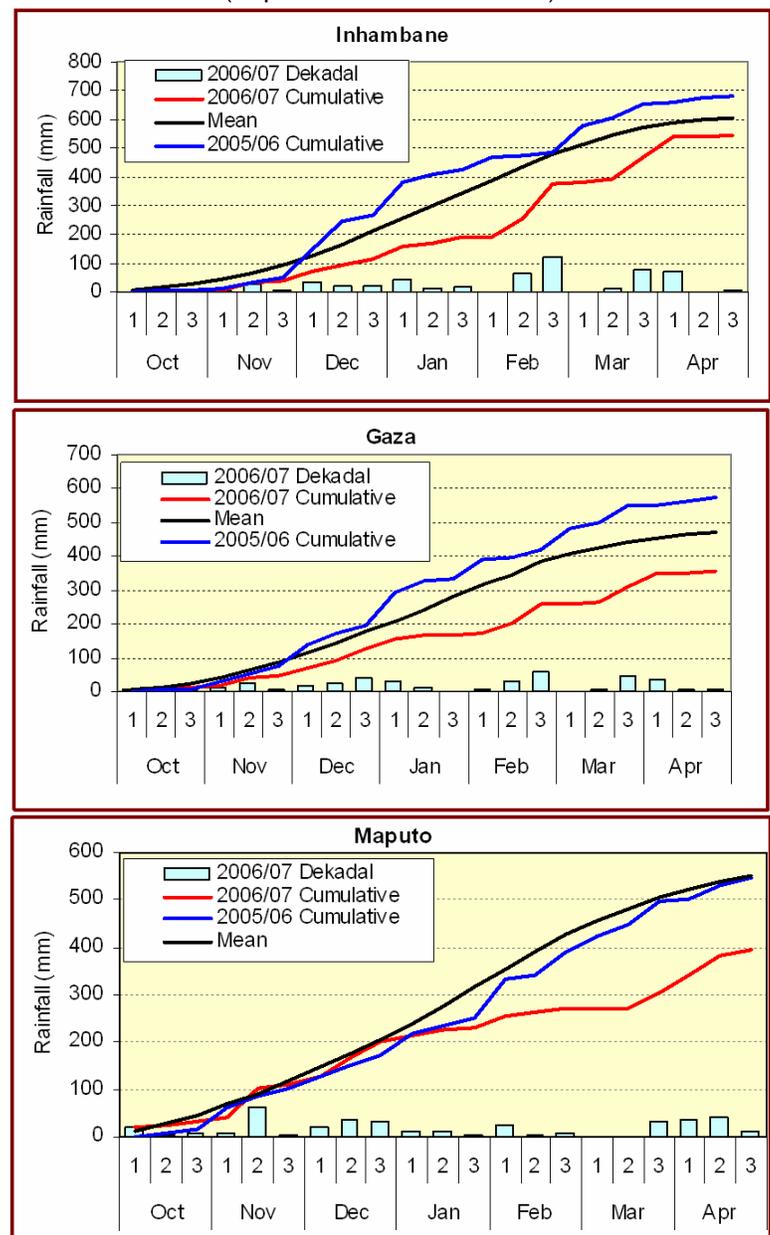
During the main cropping period of 2006/07 from October 2006 to mid March 2007, the southern region of Mozambique and parts of the central region received below normal rainfall. Previous rainfall analyses have shown that the region received less than 70 percent of normal rainfall during the first half of the period (October-December 2006), negatively affecting the normal start and the evolution of the agricultural season.

By the start of the second half of the rainy season in January, areas in the south had severe deficits of rainfall, with totals from less than 50 percent of normal to as low as 20 percent of normal in Maputo, Gaza and Inhambane provinces in the south. This has adversely affected the planting and growing stages of the first cropping season, and farmers have once again had to resort to replanting whenever rains and seed availability would allow. In many cases, these attempts have failed due to inadequate water requirements and the prolonged dry spells. This drought pattern continued in the south during February and early March.

Figure 1 shows the time series distribution of rainfall in the three southern provinces (Maputo, Gaza and Inhambane). The graphs show the cumulative 2006/07 rainfall (red line), cumulative 2005/06 (blue line), cumulative average (black line) and the decadal rainfall amounts represented by the light blue bars. In the three provinces, the onset of the rainy season was weak.

In Gaza and Inhambane, consistent rains only began in early December and were followed by low amounts of rainfall in January, while in Maputo, there were significant rains in mid November and again in mid December followed by a very dry January. In all the three provinces,

Figure 1. Rainfall decadal estimates in the three provinces of South for 2006/07 season (Maputo, Gaza and Inhambane)

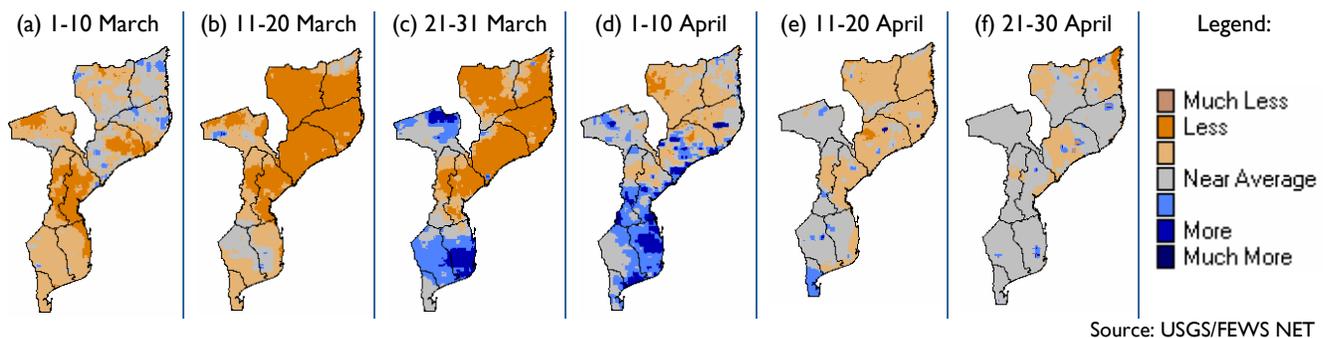


Source: FEWS NET

some significant rains have occurred in late March and early April, especially in Maputo province. These rains occurred in time for second season planting.

From late March, when rains normally begin to wind down and harvests begin, normal to above normal rains started over much of the south and parts of central region. As shown on figure 2 (c), (d) and (e), rainfall was near to above average in much of the Limpopo Basin, coastal Inhambane province, and Maputo province. While benefiting second season planting, these rains also had an adverse affect on first season crops that require dry conditions in the late stage. However, the overall impact was positive as the first season crop was small this year. These late rains from mid March will create favorable conditions for the second season planting, and low temperatures typical for this period will allow crops to benefit from residual moisture.

Figure 2. Rainfall anomalies (satellite estimates)



The updated seasonal prognosis for the April-June 2007 period indicates a greater likelihood of normal to below-normal rainfall for the greater part of the SADC region, including Mozambique. According to the SADC Drought Monitoring Centre, there is a 25 percent probability for rainfall to be above-normal; a 40 percent probability for rainfall to be normal; and a 35 percent probability for rainfall to be below normal.

Much of the central and northern region had received normal to above normal rainfall especially during the critical stage of the planting and growing phases. The floods in the Zambeze valley and localized floods in Nampula, Niassa and Cabo Delgado provinces had partially affected crops, but the overall production of the region is good and will contribute to the overall growth of the country's production.

Staple food prices decreasing, but could rise significantly in the south later in the year

As normally occurs at this time of year, staple food prices have started to decrease in various markets in response to the ongoing food supply from the surplus production areas. Prices for maize, the main staple food in Mozambique, in the selected reference markets of the north (Nampula), center (Beira) and south (Chokwé and Maputo), shown in figure 3, show a decreasing pattern from February to March. This trend is expected to continue until May/June, when the turning point will occur according to the normal seasonal pattern.

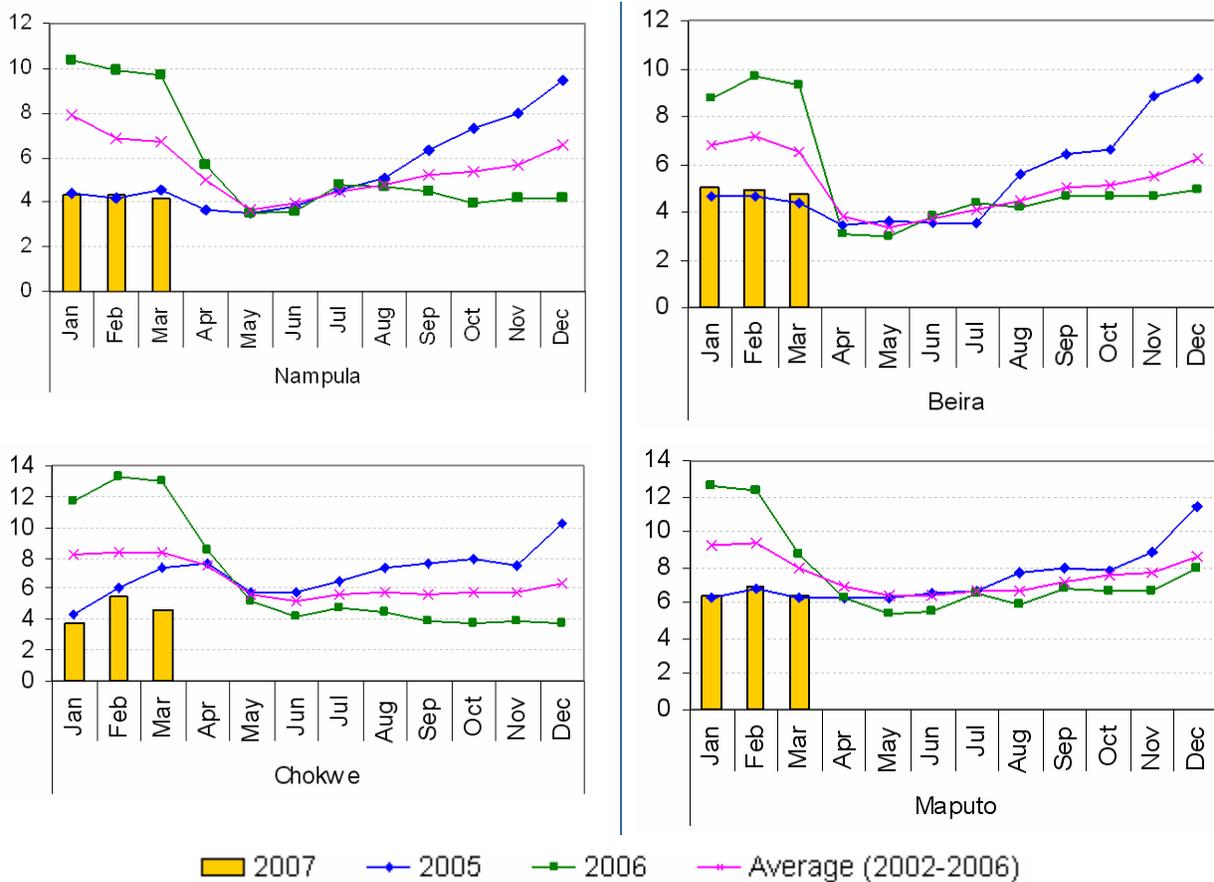
From August, maize prices in southern Mozambique could see some significant increases. Millers and brewers typically rely on South African maize for their inputs. Because maize production was very poor in South Africa this season, and export prices are expected to be high this marketing year, millers and brewers may turn increasingly to Mozambican markets to source their maize. These markets are not normally used to this demand, and consumer prices are expected to rise as a result.

This year, prices are well below the five-year average (2002-06) and last year's prices, and are in most cases similar to 2005 prices. The relatively lower food prices are favoring food access through market purchases and hence contributing to a stable food security situation throughout the country. Exceptions may include the remote areas, where markets are not as

well supplied. In these areas, food access may be limited but still possible through various coping mechanisms and, for the time being, at least some food from the recent, but poor cropping season.

Although production prospects in south were unfavorable this year, staple food prices, especially maize, are lower than average and last year. This is caused by the continuous food flow from the surplus areas of central and northern region to the deficit areas of south since the excellent harvest of last season. It should be recalled that the last season's production was the best since 2001/02, and therefore food reserves from that season are still available at the household level and at the market, which is keeping prices below average.

Figure 3. Real maize retail prices in selected markets, in meticaais per kg



Source: SIMA

In general, the current situation is characterized by production surpluses in the north and much of the central region and deficits in south. Traditional export markets for surplus maize production from northern and central Mozambique, such as southern Malawi, had an excellent harvest this season. This should encourage the flow of maize to markets in southern Mozambique. Measures to promote the flow of maize from north to south should be taken, and good storage practices should be promoted.