Below-average rainfall will likely affect the 2018/19 season in southern and parts of central regions

KEY MESSAGES

- Most poor households throughout the country continue to consume own foods from the 2017/18 harvest and are experiencing minimal (IPC Phase 1). Stressed (IPC Phase 2) outcomes are expected in several southern and central areas as well as Cabo Delgado. In some southern and central semiarid areas, planned and funded humanitarian food assistance is expected to prevent more severe outcomes and Stressed (IPC Phase 2!) is likely. However, in worst-affected areas with less or no assistance, Crisis (IPC Phase 3) outcomes are expected till the harvest in late March/April.

- October to November 2018 was characterized by below-average and erratic rainfall. In the Southern region particularly in southern Maputo Province, many early-planted crops have been lost and subsequent planting is also endangered due to erratic rainfall and continuation of high temperatures. In the central and northern regions, rainfall started in late November, but subsequent rains are crucial for crop development. Through the remainder of the season, below-average rainfall in southern and central regions and average rainfall in the north is forecast.

- Maize grain prices are highest in in southern semiarid areas and above average, due to relatively low market stocks. Conversely, maize grain prices in the north are volatile due in part to demand from regional millers. Prices throughout Mozambique are expected to gradually increase through February, and decrease after March, remaining above average in many southern areas. Poor households in semiarid areas, many of whom are expected to have below-average income, will face difficulty purchasing sufficient food to meet their basic needs.

SEASONAL CALENDAR FOR A TYPICAL YEAR

![Seasonal Calendar](image-url)
NATIONAL OVERVIEW

Current Situation

Rainfall to date across northern and central parts of Mozambique have been normal with some heavy rains in the central region, including northern Manica, Tete, and parts of Sofala province accompanied by heavy winds and thunderstorms. There are some reports of localized infrastructure damage with at least ten deaths due to lighting strikes. In the southern region, particularly in Maputo Province, southeastern areas of Gaza, and Inhambane provinces, the start of the season was delayed by ten to more than forty days.

Agricultural activities are ongoing across the country ranging from planting to cultivation. Most farmers are planting with own seeds retained from the previous harvests, which are typically of poor quality, less resistant to pests and diseases, and in most cases have low germination power. Sources from FAO and Ministry of Agriculture and Food Security (MASA) confirm there will not be any seed distribution this year apart from the provision of seeds to the normal marketing system.

According to the Crop and Early Warning Unit (DCAP), crops planted in October in the south, were affected by early season moisture stress due to insufficient soil moisture and high temperatures, which prevailed until mid-November. Replanting is ongoing with an average delay of three weeks (Figure 1). In the central region, rainfall started in late November and to date farming activities are progressing normally, with existing crops ranging from the germination to vegetative stages. In the northern region, with well-established rainfall planting activities are ongoing. However, in areas affected by sporadic attacks in coastal Cabo Delgado, there is concern ongoing attacks may be affecting farming activities. Information from these areas continue to be limited.

Cahora Bassa hydroelectric dam in the central region has started gradually increasing the quantity of water discharged through the end of the year. Dam authorities are calling for precautionary measures downstream in the Zambezi River, in Tete, Tambara, Mutarara, Chemma and Caia districts with the anticipated rise of the river levels, although below alert levels. However, water levels are lower in southern dams as the Pequenos Libombos dam is 22 percent of capacity, forcing water authorities to continue restrictions on irrigation and drinking water to major southern cities including Maputo, Matola and Boane. Other important southern basins such as Corruman and Massingir are 35 and 40 percent of capacity, respectively.

Agricultural labor opportunities are gradually increasing, particularly for planting and weeding, although opportunities are not consistent due to erratic rainfall. In semiarid areas, due to reduced payment power by middle and better-off households, payment will likely be delayed until after the harvest. Apart from agricultural labor, poor households are selling poultry or small ruminants and searching for casual labor and self-employment opportunities to access income. As more and more people engage in these activities, selling opportunities and prices decrease, limiting incomes.

Currently, livestock movement, body conditions, and prices are average. Poor households possessing livestock are selling as needed in a sustainable manner. However, in semiarid areas poor households are selling their livestock atypically more than compared to the rest of the country. In these areas, water and pasture availability is still below average, although there have been some improvements due to the onset of rains. Livestock prices in the semiarid areas are still relatively below average.
Maize grain prices in November in Gorongosa, the national reference market (Figure 2), are 24 percent below the five-year average and 5 percent above last year’s prices. Maize grain demand is above-average given the reduced maize grain availability in deficit areas; however, market supply is near average due to carryover stocks from the 2017/18 season.

However, in southern markets, the maize grain supply is limited due to below-average supplies within the region. As the price ceiling indicates, prices are not anticipated to go above the levels during the 2015/16 drought years. The retail prices of maize meal and rice, maize grain substitutes, have remained typically stable since April 2018. Currently, maize meal prices are 60 meticais/kg, which is 25 percent above the five-year average and 8 percent below last year’s prices, while rice prices are currently at 50 meticais/kg, 43 percent above the five-year average and same as last year. Rice prices have been at the same level since mid-2016.

Migration in search of employment opportunities to urban centers and South Africa continue to increase, particularly by young people. The migration to South Africa is a common practice in the southern region, but due to difficulties finding work, most migrants are unable to send remittances to relatives in Mozambique. Also, an unspecified number of people, particularly young people, are moving to areas with mining opportunities, particularly in Tete, Manica, and Zambézia provinces, for subsistence or artisanal mining labor.

According to the Technical Secretariat of Food Security and Nutrition’s (SETSAN) data gathered in August/September 2018, food consumption outcomes were indicative of Stressed (IPC Phase 2) or Crisis (IPC Phase 3) outcomes in several worst-affected areas. In Gaza Province, 14 percent of households reported a Poor food consumption score (FCS) and 24 percent reported a Borderline FCS. The same survey indicated Tete Province estimated 25 percent of households had moderate or worse FCS, followed by Inhambane with 24 percent, Manica with 23 percent, Cabo Delgado with 20 percent households with moderate or worse FCS. All other provinces had less than 20 percent of households facing borderline or worse food consumption. According to the Reduced Coping Strategies Index (rCSI), an indicator of consumption-based coping, Maputo Province had the highest percentage of households with rCSI indicative of Crisis (IPC Phase 3) or worse outcomes, with 26 percent of households, followed by Sofala with 23 percent and Tete with 20 percent. Furthermore, in Inhambane, Gaza, and Sofala at least 20 percent of the households where engaging in livelihood coping that would be indicative of Crisis (IPC Phase 3) or worse.

Based on the March/April 2018 nutrition assessment conducted by SETSAN, the overall prevalence of Global Acute Malnutrition (GAM), as measured by weight-for-height z-score (WHZ), is Acceptable (GAM <5 percent measured by (WHZ), with the exception of Namuno District in Cabo Delgado, which recorded a GAM (WHZ) prevalence of 6.4 percent, indicative of Stressed (IPC Phase 2) or worse.

Based on estimates by FEWS NET, there are currently an estimated 800,000 people facing Crisis (IPC Phase 3) or worse outcomes, specifically in the semiarid areas of Maputo, Gaza, Inhambane, Tete and Sofala provinces. Poor households in these areas are reporting food consumption that is indicative of Stressed (IPC Phase 2) or worse outcomes and are employing coping strategies indicative of Stressed (IPC Phase 2) or worse, including reducing the frequency and quantity of meals, withdrawing children from school, consuming seeds and/or wild foods in excess and inappropriate foods and/or drinks such as traditional brewed drinks given to children. However, based on information from the Food Security Cluster (FSC), approximately 172,000 people in Gaza, Tete and Cabo Delgado provinces received food assistance through in-kind or cash/voucher distributions in December. In-kind food assistance and cash/vouchers for market purchase are targeted to
districts facing Crisis (IPC Phase 3), and both estimated to cover nearly 70 percent of the minimum required Kcal. As a result, it is expected the most semiarid areas in Gaza and Tete provinces and displaced households in Cabo Delgado will be in Stressed (IPC Phase 2!) with the delivery of humanitarian food assistance.

In less affected adjacent areas and in areas where the second season was relatively good, Stressed (IPC Phase 2) outcomes are present. Stressed (IPC Phase 2) outcomes are also present in areas affected by sporadic attacks in Cabo Delgado, where some households were forced to abandon their homes, which has restricted their access to typical sources of food and income and livelihood assets. In these areas, although less than 20 percent of each total district population, there are some worst-affected households facing Crisis (IPC Phase 3) outcomes and require urgent food assistance. Throughout the rest country, most poor households are relatively food secure and consuming own foods from the 2017/18 agricultural season or purchasing from the market and are facing no acute food insecurity (IPC Phase 1).

**National assumptions**

The Food Security Outlook for December 2018 to May 2019 is based on the following national-level assumptions:

- According to NOAA and USGS, seasonal rainfall during the November 2018 to March 2019 period is forecast to be below average across southern and central Mozambique, with average rainfall most likely across northern Mozambique. Below-average rainfall is driven by the forecast weak El Niño.

- Between December 2018 and March 2019, a near average number of cyclone strikes is expected due to the forecast weak El Niño.

- Due to the forecast of normal to below-normal rainfall during the 2018/19 season, low prospects in the recovery for southern dams. There is a low to moderate risk of flooding during the entire rainfall season except for the high risk of flooding in Megaruma and Messalo river basins in the north, during the second half of the season (January to March 2019).

- Wild food and pasture for livestock is expected to increase to near normal levels. However, in the semiarid areas where rainfall may be suppressed, wild foods and pasture may will remain below average. Green foods are expected to be available at average levels across most of the country in March prior to the harvest.

- Fall Armyworm (FAW), rodents, and other typical pests, including African Armyworm, Panama diseases, hornworm caterpillar, and stalk borer, are likely to remain a threat to irrigated and rain-fed maize and other crops. This will likely have normal impacts on crops as pest management is not likely adequate.

- Overall, near-average crop production is likely for Mozambique, with above-average production likely in the northern region, average in the central region, and below-average production in the southern region.

- FEWS NET estimates, based on the Water Requirements Satisfaction Index (WRSI) and preliminary estimates by the Ministry of Agriculture and Food security (MASA), maize grain availability for the 2018/19 marketing year (April 2018 to March 2019), will be close to the five-year average. It is important to note that the overall national estimates mask the regional deficits in semiarid areas of Tete, Gaza, Inhambane, and Manica provinces.

- Informal and formal trade is anticipated to be relatively stable as imports are expected through normal channels. However, cross border trade with Zimbabwe is anticipated to increase relative to average due to worsening economic situation in Zimbabwe. The number of middle and better-off households from Zimbabwe anticipated to travel to Mozambique to purchase processed foods will likely increase. During the entire scenario period, the flow of food commodities within Mozambique will take place as normal for major staples, including maize grain which will move from producing to deficit areas.

- Through January 2019, maize grain prices will gradually increase to their peak in January/February then will likely remain stable until March before start decreasing rapidly through May/June as traders anticipate the harvest. During the entire projection period (December 2018 to May 2019), maize grain price will remain below the 5-year average by 13 percent on average and above last year’s price by 30 percent on average.
Agricultural labor opportunities are expected to be close to normal across most of the country with semiarid areas in South and central areas, likely to earn their wages during and after the harvest.

Livestock body conditions will likely gradually improve as water and pasture replenish throughout the country. However, in the semiarid areas where rainfall may be suppressed, availability of water and pasture may remain below average, although with some improvement as compared to the period prior to the onset of rains. Livestock prices will likely remain average due to the expected good body conditions of animals, with sales expected to lessen with the start of the harvest in March. Although livestock prices in semiarid areas are estimated to be below average as households sell more livestock than normal.

From December to April, migration to urban centers in Mozambique and South Africa, particularly in the South, will likely decrease as households focus on farming activities. As prospects of the season become evident, poor prospects may increase in the number of young people migrating to major urban cities.

Humanitarian food assistance is planned, funded, and likely to be delivered to an estimated 300 thousand people, covering an estimated 20 to 40 percent of the population in the worst-affected areas, including Gaza, Tete, Inhambane, and Cabo Delgado provinces. The estimated ration size to beneficiary households is around 70 percent of kilocalorie needs.

Information on the situation in Cabo Delgado remains scarce. The continuation of sporadic attacks is likely and is expected to continue disrupting farming activities of the affected households. Should this occur, some households would likely lose the opportunity to produce their own food. This is an area that require close monitoring. Depending on the intensity and frequency of sporadic attacks in Cabo Delgado by unidentified groups in the remote villages, further displacement may also occur.

**Most Likely Food Security Outcomes**

Through January 2019, food security is likely to slightly deteriorate as most areas of the country continue to experience the typical effects of the lean season. Households typically exhaust most of their food stocks, local food supplies are low, and food prices are above-average. In most areas, though, poor households will be able to access sufficient food through market purchases and own stocks and Minimal (IPC Phase 1) outcomes will prevail. However, during this period, Crisis (IPC Phase 3) outcomes are expected to continue in the semiarid areas of south and central Mozambique, mostly in Gaza, Inhambane, Tete, and Sofala provinces. Most poor households in these areas will not have food stocks during this time and will engage in agricultural and casual labor to meet their basic food needs. However, given the poor start of the season, which is lowering income earning opportunities, and high food prices, food access through market purchases will be lower than normal. Many poor households in these areas are already reporting difficulty meeting their basic food needs and this is expected to persist during the lean season as food and income sources remain below-average, and many will rely heavily on wild foods. However humanitarian assistance will likely mitigate these outcomes and these households will be in Stressed (IPC Phase 2!) in the semiarid areas of Gaza and Tete province. Overall, in adjacent areas less affected by dryness in 2017/18 and areas affected by the attacks in Cabo Delgado Stressed (IPC Phase 2) outcomes will persist.

In February, the majority of poor households in the areas affected by dryness early this year, will still have below-average incomes and constrained purchasing power, particularly in south and center, as food prices will likely continue to be above-average and households still employ coping strategies and rely on market purchases for food. As a result, these households will continue to face Crisis (IPC Phase 3) outcomes through March. Humanitarian assistance is planned, funded, and likely to reach roughly 300,000 people in the worst-affected areas in January, then will be scaled-up to reach about 380,000 people in February and then distributed again at the same level in March. As a result, it is expected most of the semiarid areas in Gaza and Tete provinces will likely be in Stressed (IPC Phase 2!) with humanitarian assistance.

As green foods become available and the harvest starts in late March/April, most poor households will gradually reduce their dependency on coping strategies and market purchases and start to rely on green foods and harvested crops. The poor and late start of rainfall and forecast of below average rainfall in southern areas affected by dryness in 2017/18 season will likely reduce the chances of post-harvest recovery of households currently facing Crisis (IPC Phase 3) outcomes. Although, overall, from April, with the availability of harvested crops, most poor households will be accessing food from their own production and food insecurity outcomes will likely improve to Stressed (IPC Phase 2) and Minimal (IPC Phase 1) depending on the harvest and the household’s ability to recover from the poor 2017/18 season.
Through February the general prevalence of acute malnutrition is anticipated to deteriorate across the country, however in most districts the prevalence is expected to remain with an Acceptable level according to the WHO classification for the severity of malnutrition. Nevertheless, some geographical disparities will persist, with a projected deterioration of GAM from Acceptable to Alert (GAM 5-9.9% WHZ), for Balama in Cabo Delgado, Marara in Tete, Milange in Zambézia and Macossa in Manica Province. The situation is expected to continue in Alert (GAM 5-9.9% WHZ) in Namuno in Cabo Delgado. From March 2019, overall wasting level in the country is expected to improve to Acceptable (GAM <5%) due to increased food access after main harvest season.

**AREAS OF CONCERN**

**Southern Semiarid Cereals and Cattle (Livelihood Zone 22)**

Many areas in this livelihood zone had total crop failure in 2017/18 season and the impacts continue through the next harvest in March/April 2019. The lean season started atypically early in July/August. Maize grain is currently only in Chókwe market, but other markets are offering a diversity of mostly processed food, such as maize meal, rice, oil, and sugar. Maize grain is typically supplied by local producers, but currently it is being imported from the central region increasing prices. In November, maize grain prices were 21 percent above the 5-year average and 34 percent above last year’s prices (Figure 4). To access food poor households are gathering wild foods, but the availability of wild foods is below-average.

Poor households continue to engage in atypically high levels of self-employment and agriculture labor to earn an income for market purchases, although these activities remain very limited in remote areas due to poor access to markets and labor opportunities. Agricultural labor opportunities are slowly increasing with the start of rainfall, however, due to the reduced payment power by middle and better-off households, access to income through these activities are likely to be delayed until after the harvest. In addition, poor households with small livestock holdings are increasing the sale of poultry and small ruminants to supplement their income as necessary.

According to SETSAN data collected in August/September 2018, FCS is indicative of Stressed (IPC Phase 2) or Crisis (IPC Phase 3) outcomes in Gaza and Inhambane provinces. In Gaza, 14 percent of households reported a Poor FCS with 24 percent of households reporting a Moderation FCS and in Inhambane 18 percent of households had an FCS of Moderate with 6 percent having Poor FCS. In addition, 23 percent of households had accelerated depletion/erosion of strategies and assets. The majority of poor households in the zone are likely to continue facing Crisis (IPC Phase 3) or above outcomes until the next harvest in late March/April 2019 as households are anticipated to resort to wild foods as their main food source and self-employment activities will decrease as households focus on planting. Humanitarian food assistance was delivered in December to the four of most affected districts in Gaza Province (Chicalualua, Chigubo, Guijá and Mapai) with about 43,000 people receiving food assistance in the form of in-kind or cash/vouchers. Stressed (Phase 2?) outcomes are now present in these districts. Humanitarian food assistance is planned, funded, and likely to be scaled up to include more households in Gaza province and to include households in Panda and Funhalouro districts in Inhambane in January. The food assistance will reach an estimated 150,000 people through March. As a result, Stressed (IPC Phase 2?) outcomes are likely in these areas through March.

Rainfall will increase the availability of seasonal wild foods and green foods, improving food availability, however large food gaps will persist until the harvest in March/April 2019. Food access will start improving gradually with the availability of newly-harvested crops as the majority of households will start accessing own foods. As food becomes available at the household level, poor households will rely less on market purchases. Pasture and water for livestock will also improve significantly, resulting in improvements in cattle body conditions and milk availability. Livestock sales will likely decrease as households...
will likely earn an income from the sale of their own production. The availability of water or residual moisture following the main harvest will also be an opportunity for households to start investing in second season planting starting in April/May. The majority of poor households will face Stressed (IPC Phase 2) or Minimal (IPC Phase 1) outcomes.

**Central Semiarid Cotton and Minerals (Livelihood Zone 15)**

Areas of this livelihood zone were also affected by mid-season dryness and pest infestation, although to a smaller extent than the Southern Semiarid Cereals and Cattle Zone (LHZ 22). Carryover stocks and near average production in 2017/18 in surplus producing areas is providing near average maize grain market availability. November maize grain prices are 24 percent below the 5-year average and 10 percent below last year’s prices. Although, due to the normal depletion of household food stocks, the majority of poor households are relying on market purchases for food. Wild foods are primarily gathered for sale as is typical for this time of year but are atypically being consumed. Fishing, only accessible near Cahora Bassa Dam and along rivers is an important food and income source. Poor households are selling livestock for income and intensifying their engagement in self-employment opportunities to compensate for the inability to sell staple crops, but as competition increases, incomes from these opportunities decrease. Employment opportunities and livestock sales coupled with high maize grain prices, household purchasing power is constrained.

In last ten days of November, heavy and widespread rains occurred and continued into December. Agriculture labor activities are at near average level, as planting and weeding are ongoing with rainfall. However, payment is likely to be delayed until the harvest in April. The intensification of seasonal rains increase pasture availability likely improving livestock body conditions.

According to SETSAN data collected in August/September 2018, indicate at least 15 percent of households in Manica, Sofala, and Tete have Moderate FCS with very few households indicating poor FCS. This is indicative of Stressed (IPC Phase 2) outcomes, however this data is representative at the Provincial level and it is important to note there is variation in the outcomes at the district level. The majority of poor households are facing food gaps and Crisis (IPC Phase 3) outcomes as they are forced to engage in unsustainable and coping strategies indicative of Stressed (IPC Phase 2) and Crisis (IPC Phase 3) outcomes, including reducing the frequency and quantity of meals, relying on less expensive foods, borrowing food from relatives or better off households and consuming less preferred and non-recommended wild foods in excess. However, with below average income and high food prices from the local markets, coping strategies will not be sufficient to meet poor households’ minimum basic food needs despite consuming less preferred foods and reducing the number of meals. The less affected households are facing Stressed (IPC Phase 2) outcomes as they are still able to meet their minimum food requirements but are forgoing essential basic non-food needs. Humanitarian food assistance in December reached 100,000 people in five districts (Cahora Bassa, Chítua, Doa, Mágoe, Marara). In the presence of Humanitarian Food Assistance these districts face Stressed (IPC Phase 2!).

Crisis (IPC Phase 3) outcomes will likely continue through January 2019 and into February/March as most households will not access own foods and will likely continue to be reliant on market purchases, wild foods, expanded coping strategies. The availability of green foods in March are anticipated to gradually improve food security outcomes. Humanitarian assistance is anticipated to continue through March reaching 120,000 people in Cahora Bassa, Chítua, Doa, Mágoe, Marara mitigating outcomes. These districts will be in Stressed (IPC Phase 2!). Starting in April through May 2019, food security outcomes are expected to continue to improve with the main harvest in April/May and households will rely less on market purchases and food consumption will improve significantly. Pasture and water for livestock are anticipated to improve significantly, resulting in better cattle body conditions. As a result, livestock sales will likely be minimal as most households will be receiving their needed income from the sale of their own produce and in-kind payment for their agricultural labor. The availability of water or residual moisture following the main harvest will also be an opportunity for households to start investing in second season.
planting in May. Household food security will improve as households are expected to be in Stressed (IPC Phase 2) or Minimal (IPC Phase 1).

EVENTS THAT MIGHT CHANGE THE OUTLOOK

Table 1. Possible events over the next eight months that could change the most-likely scenario.

<table>
<thead>
<tr>
<th>Area</th>
<th>Event</th>
<th>Impact on food security outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Southern and central regions</td>
<td>Significantly below average and early cessation of rainfall</td>
<td>• This may worsen the situation beyond the overall indicated level above and the anticipated recovery in April/May, may not occur and increase the number of households in need of humanitarian assistance.</td>
</tr>
<tr>
<td>Livelihood zones 15 and 22</td>
<td>Inadequate response by traders</td>
<td>• If traders do not respond as anticipated, and no additional stocks flow to deficit areas, local markets will continue to be undersupplied. This would push staple food prices higher than current expectations increasing food deficits, especially for poor households.</td>
</tr>
<tr>
<td>National</td>
<td>Severe flooding</td>
<td>• Severe flooding from December 2018 to March 2019 would negatively affect poor households in the major river basins, particularly in the north, coastal areas, and Lower Zambezi and Limpopo rivers. As a result, poor households would likely need food aid for at least three to four months, until the post-flood crops are harvested, which is beyond the scenario period.</td>
</tr>
<tr>
<td></td>
<td>Category 3 or higher cyclone</td>
<td>• Poor households in particular could temporarily face acute food shortages, but the total number is not expected to exceed 20 percent of the total population of the affected area, and therefore the areas projected to be at Minimal (IPC Phase 1) outcomes may worsen to Stressed (IPC Phase 2).</td>
</tr>
<tr>
<td>Coastal Cabo Delgado</td>
<td>Intensification of the attacks in Cabo Delgado</td>
<td>• If instability caused by sporadic attacks in Cabo Delgado, continues, the level of acute food insecurity may worsen from Stressed (IPC Phase 2) to Crisis (IPC Phase 3) outcomes and may affect households’ livelihoods for post-harvest period, as households will not adequately invest in farming activities given insecurity.</td>
</tr>
</tbody>
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ABOUT SCENARIO DEVELOPMENT

To project food security outcomes, FEWS NET develops a set of assumptions about likely events, their effects, and the probable responses of various actors. FEWS NET analyzes these assumptions in the context of current conditions and local livelihoods to arrive at a most likely scenario for the coming eight months. Learn more here.