KEY MESSAGES

- Following crop failure and significantly below-average main season production, Crisis (IPC Phase 3) outcomes are already present in semiarid areas of Gaza and Inhambane, requiring urgent food assistance. Food security is projected to deteriorate and extend to other southern and central areas, primarily Tete, through January 2019. However, in the north and some central areas, Minimal (IPC Phase 1) outcomes are expected to prevail through the scenario period due to favorable food availability and access.

- From June to September 2018, the majority of poor households are likely to consume food from their own production and market purchases. However, in areas facing Crisis (IPC Phase 3) outcomes, poor households are expected to employ coping strategies to try to cover their food gaps. From October 2018 to January 2019, during the typical lean season period, households are likely to employ even more unsustainable coping measures, including excessively consuming wild foods. The number of food insecure people is also likely to increase.

- In southern and central areas, incomes are expected to remain below average, particularly given the most likely El Niño impacts on the new agricultural season. However, through November, food access will be slightly facilitated by generally below-average maize prices in urban markets. Thereafter, prices are likely to continue rising, constraining purchasing power. In semiarid areas, below-average maize supplies, combined with increased demand, could push prices to above-average levels, particularly in remote markets.

SEASONAL CALENDAR FOR A TYPICAL YEAR

Source: FEWS NET

FEWS NET Mozambique
fewsinquiry.mozambique@fews.net
www.fews.net/mozambique

FEWS NET is a USAID-funded activity. The content of this report does not necessarily reflect the view of the United States Agency for International Development or the United States Government.
NATIONAL OVERVIEW

Current Situation

Current Food Security

Generally, most rural households are relatively food secure and consuming their recently harvested own food from the 2017/18 agricultural season, except in southern and central semiarid areas of Mozambique. These areas experienced crop failure or significantly below-average production due to erratic and poor rainfall and pest infestations. In these areas, without their own production to consume or sell, after enduring the previous lean period, and insufficient income for market food purchases, very poor and poor households are unable to meet their minimum food needs. Based on remote sensing information, crop failure was not as widespread in the central region compared to the south, but food gaps are emerging for poor households in both places, but more significantly in parts of southern Gaza and Inhambane. The most vulnerable households have employed all sustainable livelihood and coping strategies, forcing them to start engaging in unsustainable and crisis coping strategies, including reducing the frequency and quantity of meals, withdrawing children from school, and even consuming seeds and/or non-recommended wild foods. Consumption-based coping strategies are currently not as resilient, as many of the same affected households also lost most of their livelihood assets during the 2015/16 El Niño drought and were still recovering, earning below-average incomes during the 2017/18 agricultural season. In addition, due to the remoteness of most of these areas, as well as a poor marketing system, only a small percentage of poor households have the ability to earn extra cash through livestock sales or charcoal production.

Currently, the highest levels of food insecurity are in the semiarid interior areas of Gaza and Inhambane, where poor households are facing Crisis (IPC Phase 3) outcomes and requiring urgent food assistance. However, there are also currently large numbers of poor households in southern Tete experiencing Crisis (IPC Phase 3). Minimal (IPC Phase 1) acute food insecurity outcomes prevail over northern Mozambique and much of the central region, and portions of Inhambane and Maputo provinces, while Stressed (IPC Phase 2) outcomes are present in parts of Tete, northern and southern Sofala and Manica provinces, northern Maputo, and small areas in Gaza and Inhambane provinces.

2017/18 Agricultural Season Progress

While the main harvest has ended in the south, it is still ongoing in major producer areas in the central and northern regions. According to the Ministry of Agriculture and Food Security (MASA), due to the combination of inundations in the north, dryness in the south and central areas, and pests throughout the country, a total of 274,742 hectares of crops or 5.2 percent of total planted area was lost, which is overall quite minimal. The districts most impacted by dryness include Moatize, Chifunde, and Changara in Tete Province and Mapai, Chibuto, and Manjacaze in Gaza Province. MASA estimates 63,900 hectares were lost due to Fall Armyworm (FAW), with Gaza Province being the most affected.

Preliminary estimates by MASA indicate total 2017/2018 production at 3.2 million MT of cereals (including maize, sorghum, millet, rice, and wheat), which is above the five-year average. Total production of maize alone is estimated at 2.45 million MT, representing an increase of 4.4 percent from last year’s production, which was already one of the best seasons in more than 10 years. The production of pulses (beans and groundnuts) at the national level is estimated at 832,000 MT, an increase of nearly 18 percent from last year’s total production. The total production of tubers and roots (cassava and sweet potatoes) is estimated at 14.9 million MT, an increase of 17 percent over the previous season. The national food balance sheet, which
illustrates food availability and deficits, as well as projected imports/exports during the 2018/19 consumption period, is yet to be published.

Since the start of the second season period in April, in areas that have residual moisture for planting, households are intensifying efforts to make up for shortfalls from the main season, which is a typical livelihood strategy. However, conditions continue to be much drier than normal. Also, this year’s average temperatures have been abnormally higher when compared to the historical average, exacerbating the dry conditions.

Market Supplies and Prices

Since the onset of the main harvest in April, the trend of maize grain prices, the primary staple food, have been decreasing seasonally as typical. However, current prices are decreasing at a much slower pace than usual. For example, in Tete market, the average decreasing rate is 50 percent, but currently is only declining at a rate of 19 percent. From April to May 2018, maize grain prices from the FEWS NET monitored markets decreased by 6.5 percent on average, with the largest recorded drop in Gorongosa, but there was also a 19 percent increase in Mocuba, also a central market. While the decreasing trend reflects the gradual increase of maize grain availability from the current season, the slowing rate of decline also reflects the delayed harvest in some places due to replanting. On average, May maize grain prices were 4.4 percent below last year’s prices and nine percent below the five-year average. Maize supplies remain adequate in the reference markets in the most accessible markets, but in remote markets in non-surplus-producing areas affected by this year’s shocks (dryness and pests), there is below-average availability. Prices of two maize substitutes, maize meal and rice, were relatively stable from April to May. On average, May maize meal prices were 21 percent below last year’s prices and 19 percent above five-year prices, while rice prices were seven percent below last year’s prices and 35 percent higher than the five-year average.

Northern Unrest and Potential Food Insecurity

According to various media reports, unidentified, armed rebel groups have caused unrest in parts of northern Cabo Delgado. Currently five districts, including Mocimboa da Praia, Palma, Nangade, Quissanga, and Macomia, have been affected, and some local, rural populations have been displaced, disrupting basic livelihoods, as they relocate to safer areas. This is the time when most households would be accessing food from their own crops, which according to the Water Requirement Satisfaction Index (WRSI) as of mid-June, indicates a favorable harvest, but food access is likely to be affected in insecure areas as people are forced to leave their homes and fields. As of the end of June, the magnitude of displacement and potential food assistance needs of the affected populations are unknown. The Government of Mozambique is encouraging households to return to areas that have been secured by defense and security forces. FEWS NET estimates that the majority of households are able to meet their minimum food needs and are in None (IPC Phase 1), but there is a possibility that some households may face Stressed (IPC Phase 2) or even Crisis (IPC Phase 3) outcomes due to forced displacement, which would require urgent food assistance. FEWS NET continues to monitor the situation.

SETSAN March to May 2018 Food Security Assessment Findings

Based on its March to May 2018 food security assessment, the Technical Secretariat of Food Security and Nutrition (SETSAN) estimates through September there will be nearly 500,000 people in Mozambique facing Crisis (IPC Phase 3) outcomes, requiring urgent food assistance. The National Institute of Disaster Management (INGC) through the Technical Council of Disaster Management (CTGC) is currently working with the Humanitarian Country Team (HCT) to mobilize the necessary resources for response. The plan is that humanitarian assistance would also cover other non-food needs, such as improving sanitation and providing needed inputs, like seeds, for the 2018/19 agricultural season.

Humanitarian Assistance

As of the end of June, the World Food Programme (WFP) provided food assistance to more than 150,000 people across the country, with the largest distributions in central areas of the county. WFP’s June target was over 210,000 people, and distributions, which are a combination of in-kind, commodity vouchers, and cash, were still ongoing at the time of publishing. Other humanitarian organizations are planning to initiate assistance, primarily focusing on needs outlined in the most recent SETSAN findings, but are still in the process of mobilizing resources. FEWS NET will provide further updates on planned, funded, and likely humanitarian assistance provisions in future reporting.
National assumptions

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

**2017/18 Crop Production Estimates**

- **Average main harvest prospects.** Based on estimates from WRSI extended to June, which does not incorporate the effects of pests, maize grain production is expected to be good in the northern region, close to average in the central region, and well below average in the southern region. Overall, at a national level, the above-average production in the north will compensate for southern shortfalls.

- **Poor second season prospects.** Residual moisture levels for second season production in southern and central areas is expected to be below average through September. As a result, the total level of production is expected to be less than 50 percent of the five-year average.

**Carry-over stocks and food availability/access**

- **Carry-over stocks.** With MASA estimates of nearly 800,000 MT in maize surpluses from the 2016/17 agricultural season, the carry-over stocks for the current consumption year were well above average even for poor households. Generally, for poor households though these were exhausted before April 2018.

- **National maize grain availability.** Locally-produced maize grain will be sufficient for domestic needs due to the expected above-average maize grain production in the surplus areas, including much of the northern region, northeastern Tete, and central Manica and Sofala provinces despite large deficits in the semiarid southern and central areas. As a result, import and export levels will be close to typical levels at 175,000 MT and 110,000 MT, respectively.

- **Household stocks from 2017/18 season.** Throughout the scenario period, food availability at the household level will be close to average for much of the country but well below average in semiarid southern and central regions.

- **Availability of wild foods.** The quantity of wild foods are expected to be below average through the scenario period in semiarid areas of the south and central regions where they are an important source of food.

**Markets and Trade**

- **Maize grain prices.** Based on an analysis of current prices and drivers, FEWS NET’s integrated price projections for the national reference market of Gorongosa show that on average maize grain prices are expected to remain below the five-year average by 33 percent and below last year’s prices by 21 percent until November 2018. Thereafter, prices are likely to rise through January 2019 to levels about 10 percent higher than 2017 (see Figure 1).

- **Stable maize meal and rice prices.** Throughout the scenario period, due to adequate and stable supplies, prices for maize meal and rice, both direct substitutes for maize grain, are anticipated to remain generally stable but above the five-year average.

- **Informal internal flows.** Informal domestic trade flows are expected from both the north and producer areas of the central region to deficit areas. However, as typical, the flows from north to south, except for beans and groundnuts, are likely to be lower due to higher transaction costs.

- **Inflation.** Through August 2018, the inflation rate is forecast to remain below three percent, at significantly lower levels than the five-year average of 8.4 percent, but then is expected to gradually rise until January 2019.

**Seasonal forecast**

- **2018/19 Rainy season.** According to NOAA and USGS, given the most likely scenario is for El Niño conditions, below-average rainfall, which may also be delayed and erratic in terms of spatial and temporal distribution, particularly in southern areas of Mozambique, is likely between October 2018 to January 2019. There is some uncertainty in this forecast, particularly in regard to sea surface temperatures in the Indian Ocean.

- **Cyclones.** Between December 2018 and January 2019, there is an increased likelihood of reduced cyclone strikes to affect Mozambique due to the elevated probability for El Niño and a negative Southern Indian Ocean Dipole (SIOD).
Hydrology/Flooding Risk

- **Dam levels.** Central and northern dams are at average to above-average levels, while the major dams in the south, while better than February 2018, are still under 56 percent of their full capacity. The levels in the southern Pequenos Libombos dam have significantly improved, increasing the water capacity for Maputo, Matola, and Boane cities, but rationing measures through the dry season are still likely. Given the El Niño forecast, recovery during the next rainy season is expected to be minor for the southern region and moderate for the central region.

- **Flooding in the north.** With the increased probability of an El Niño during the 2018/19 season, based on historical events, there is a higher risk for flooding in the northern region in January 2019.

Agricultural inputs

- **Second season.** The majority of poor households are unable to afford short-cycle seeds needed for second season planting. Since seed distributions by partners are extremely low, FAO has not planned any input assistance, there will be inadequate supplies at the household level.

- **2018/19 Main season.** FEWS NET assumes that as usual, for main season planting, a large proportion of farmers will use retained seed, which are typically of poor quality and less resistant to pests and diseases, including FAW. Though not sufficient, FEWS NET expects seed distributions will likely take place in August and September, key times, but if they are received past the onset of rains in November/December, this will affect yields.

Pests

- Fall Armyworm (FAW), rodents, and other typical pests, including, elegant and spiny grasshopper, African Armyworm, and stalk borer, are likely to remain a threat to irrigated and rain-fed maize and other crops through January 2019.

Agricultural Labor Demand and Wages

- From June to August, agricultural labor activities for second season production in southern and central areas, where this is feasible, are expected to be below-average. From September to January 2019, agricultural labor opportunities are expected to improve; however, with the prospect of El Niño, they could be at average to below-average levels. Even though the wealthiest households from the southern and central regions managed to earn near-average income during the 2016/17 harvest, wages are expected to be below average due to 2017/18 shortfalls and the prospects of another poor season. In the north and central producing regions, the level of the agricultural labor will remain close to the five-year average.

Alternate Labor Opportunities

- **Self-employment.** Through the entire scenario period, with an increasing number of people engaging in self-employment activities to supplement their incomes, opportunities to sell services and/or goods and earn income will be reduced.

- **Migration.** During the entire scenario period, it is anticipated there will be above-average migration to urban centers in Mozambique and South Africa, particularly by young people from the south, to earn income from petty trade.

Livestock Body Conditions, Prices, and Movement

- Average livestock body conditions, productivity, and trekking distances are expected to persist during the scenario period, except in semiarid southern and central regions where there is likely to be a deterioration in pasture and water availability from August to October, which may affect livestock body conditions. This may lead to some distressed sales, which combined with sales for income to purchase food, may lead to below-average prices due to a possible oversupply of livestock in markets.

Northern Insecurity

- Throughout the scenario period, there is the potential for localized displacement and livelihood disruptions in parts of Cabo Delgado, primarily Mocimboa da Praia, Palma, Nangade, Macomia, and Quissanga districts, that are experiencing insecurity, which may require humanitarian assistance.

Emergency Humanitarian Assistance

- WFP has planned and funded assistance through January 2019 to assist a varying number of beneficiaries (see Table 1). As previously mentioned there was June assistance to beneficiaries across the south, central, and northern regions. Per the below table, the number of beneficiaries decreases through August, there is no planned assistance in September, and then it will initially resume in October in the south. From November 2018 to January 2019, the current available resources will allow WFP in theory to assist the same 128,000 people in southern and central areas. Given SETSAN’s estimates of the number of people in need through September, before the peak of the lean season begins, these plans...
would cover only about 25 percent of the population. However, WFP intends to scale up its assistance plans to reach approximately 400,000 people if it is able to secure funding.

### Table 1. WFP Planned and Funded Food assistance (2018/19)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>South</td>
<td>34,500</td>
<td>22,500</td>
<td>22,500</td>
<td>0</td>
<td>28,000</td>
<td>28,000</td>
<td>28,000</td>
<td>28,000</td>
</tr>
<tr>
<td>Central</td>
<td>136,183</td>
<td>50,390</td>
<td>31,000</td>
<td>0</td>
<td>0</td>
<td>100,000</td>
<td>100,000</td>
<td>100,000</td>
</tr>
<tr>
<td>North</td>
<td>40,000</td>
<td>20,000</td>
<td>20,000</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Total</td>
<td>210,683</td>
<td>92,890</td>
<td>73,500</td>
<td>0</td>
<td>28,000</td>
<td>128,000</td>
<td>128,000</td>
<td>128,000</td>
</tr>
</tbody>
</table>

Source: WFP

### Nutrition

- Based on the March/April 2018 nutrition assessment conducted by SETSAN, the overall prevalence of Global Acute Malnutrition (GAM) in the assessed districts is Acceptable (GAM <5 percent), with the exception of Namuno District in Cabo Delgado, which has a 6.4 percent GAM rate, which indicates an Alert situation (GAM by WHZ 5-10 percent). This prevalence of acute malnutrition is expected to be sustained through September, but then an overall deterioration is expected through January 2019. However, most of the analyzed districts are expected to remain at the same levels. However, geographical disparities exist (underlying non-food security factors are driving these higher rates), with a projected level of acute malnutrition expected to deteriorate from Acceptable to Alert/Serious (GAM by MUAC 6-10.9 percent) in Balama and Chiure in Cabo Delgado, Marara in Tete, and Macossa in Manica Province.

### Most Likely Food Security Outcomes

From June to September, the majority of poor households in the north and much of the central region are expected to maintain good food availability and access; however, this will not be possible for poor households in semiarid southern and central areas. With below-average harvests or total crop losses and limited or no available livestock for sale, poor households are not expected to have enough income to meet their minimum food needs. In addition, staple food prices are expected to rise to above five-year averages in local markets in these areas, further constraining household purchasing power. In order to obtain money for market food purchases or to pay for key non-food expenditures, if still possible, households will be engaged in typical self-employment activities. In August and September, the second season harvest, which typically replenishes household food stocks, is likely to be minimal or nonexistent for those that experienced below average or no harvesting since residual moisture for planting was not available. (Poor households, who are unable to produce any of their own food stocks from second season production, are not likely to have any until the next main season.) Competition for labor opportunities, including self-employment, is expected to increase during this period, further limiting needed income-earning opportunities. Between June and July, some of the districts that had previously been in Stressed (IPC Phase 2), including the majority of districts in Gaza Province, excluding Chigubo in Gaza, which was already facing Crisis (IPC Phase 3) outcomes; western Inhambane Province, and southern Tete Province, are expected to experience Crisis (IPC Phase 3), as poor households in those districts will be unable to meet their minimum food needs. In response, they are likely to intensify typical livelihood and coping mechanisms that are usually employed during the height of the lean season, including forgoing expenditures on needed livelihood investments and selling more charcoal and firewood. However, even with these strategies, more poor households, as early as August, will be forced to start engaging in unsustainable and crisis coping strategies, including reducing the frequency and quantity of meals, withdrawing children from school, and even consuming seeds. Those with livestock will desperately sell in an unsustainable manner, while others without, will atypically consume wild foods even though excessive consumption for longer periods of time, particularly *xicutsi*, can lead to health problems, including malnutrition. Other nearby districts, with less semiarid characteristics and better access to markets, income-generating activities, and second season production possibilities, are expected to experience Stressed IPC (Phase 2) outcomes (far southern areas of Gaza, parts of Inhambane, northeastern and central Maputo, north-central Tete Province, and northern and southern areas of both Sofala and Manica provinces). The rest of the country is expected to remain in Minimal (IPC Phase 1).

From October to January 2017, food security is still not projected to change for northern and some central areas, Minimal (IPC Phase 1) outcomes will still prevail; but the number of poor households facing Crisis (IPC Phase 3) outcomes in the country’s semiarid areas is expected to increase. This is the period in which the country starts experiencing typical effects of the lean season, but this year the level of severity will be heightened. Poor households will further intensify crisis coping strategies that they had already been employing, further reducing the frequency and quantity of foods due to income shortages, and excessively consuming wild foods. Agricultural labor opportunities are expected to increase during this period.
as the next season begins, providing a slight income cushion, but overall they are expected to be slightly below average. With the forecast El Niño, farmers are likely to be slow to plant. In general, the onset of the November rains will provide a variety of wild and seasonal foods that will gradually help to fill some food gaps among poor households until the green food becomes available in February and March 2019. However, if there are delayed and erratic rains, this could limit the availability of seasonal wild foods. In the areas already in Crisis (IPC Phase 3), and in additional areas, including most of Govuro in Inhambane Province, Machanga and Chemba in Sofala Province, and Chiuta and Chifunde in Tete, also affected by dry conditions and pests during the main 2017/18 season, Crisis (IPC Phase 3) outcomes will persist and start emerging. A greater number of poor and very poor households are expected to have food consumption gaps, and for some of the most vulnerable, the gaps will increase even further. For many poor households, the seasonal wild foods will be their only major source of food, particularly in areas that have been in Crisis (IPC Phase 3) longer, and for those who have limited earning potential. It is possible there could also be smaller, worst-affected populations, particularly elderly, widows, and/or children living alone, with less capabilities to engage in any of the indicated alternative activities, especially in parts of Chigubo in Gaza Province. These people could experience larger gaps in their basic food needs and face more severe outcomes in the absence of assistance.

AREAS OF CONCERN

Southern Semiarid Cereals and Cattle (Livelihood Zone 22)

Current Situation

Based on WRSI satellite estimates (see Figure 3), and confirmed by FEWS NET ground assessments, less than 20 percent of the total livelihood zone area had a main season harvest. The only households which managed to harvest were those who had some late-planted crops that survived due to the late rains in February, with highest success rates in Massangena District but lowest in Chigubo since it has the least amount of water resources. All previous planting attempts failed. Due to the widespread crop failure or extremely low yields, currently food reserves at the household level have been exhausted or are extremely low, which is atypical.

Poor households have reduced the area planted for second season production as they do not have enough seeds due to multiple replanting attempts during the main season, and they lack the income to purchase needed inputs. Agricultural labor income earned from the main and second season production to date has been below average, which is constraining needed food market purchases. May prices from Chókwe, the major reference market in the zone, were above the five-year average and last year’s prices by 17 and 25 percent, respectively, but in remote, interior areas of the zone, staple food prices were well above these margins.

FEWS NET estimates more than 20 percent of very poor and poor households in the zone are facing food gaps and Crisis (IPC Phase 3) outcomes. In order to attempt to cover their minimum food needs, poor households sell chickens if they can, which is atypical for this time of year; increase their engagement in casual labor and self-employment to earn cash for market food purchases; and consume less preferred and non-recommended wild foods. According to the May 2018 SETSAN acute IPC analysis results, during the time of the assessment in April, 25 percent of households had Poor food consumption and 32 percent had Borderline food consumption. In addition, 25 percent of households had extreme depletion/erosion of strategies and assets and 45 percent had accelerated depletion/erosion of strategies and assets. In June, WFP assisted 29,500 people in the south of Mozambique, including many in this zone, but exact numbers are unknown. The very poor and poor account for nearly 211,000 people in the zone, so the numbers being assisted in this zone are likely quite low.

Assumptions

In addition to the National level assumptions, the following assumptions apply to this area of concern:

- **Above-average maize grain flows into the zone.** Through the entire scenario period, local and formal trade flows from the central region are expected to atypically increase to make up southern market supply shortfalls. Regardless, the overall maize grain availability will remain below average through January 2019 and until the harvest in March 2019. In remote areas, access for maize grain, which atypically is difficult, will be even more challenging during the scenario period.
• **Above-average maize prices.** Based on an analysis of current prices and drivers, FEWS NET’s integrated price projections for the national reference market of Chökwe show that through October, maize grain prices are likely to remain stable, and from November, they will gradually rise, peaking in January 2019. During the entire projection period, on average, maize prices are expected to be slightly above the five-year average by nine percent and above last year’s prices by 28 percent. However, in the remote areas away from the Chökwe market, maize grain prices will be abnormally much higher than the projected prices in Chökwe.

**Most Likely Food Security Outcomes**

The number of poor households in this zone facing food consumption gaps are expected to increase through January 2019. As a result, emergency food assistance will be required throughout the scenario period to cover very poor and poor households’ minimum food needs. They will not have any of their own production, and with below-average incomes from both agricultural labor and self-employment, at a time of rising staple food prices, needed market food purchases will be constrained. People are expected to resort to wild foods for their main food source. Migration to major urban cities and neighboring South Africa in search of temporary casual labor, mostly by young people, will likely continue at above-average levels until at least the planting season begins. With expected El Niño conditions, agricultural labor activities may be delayed and below-average, further constraining incomes or in-kind payment. By November, the food supply in local markets will decline, but household demand will increase, pushing staple food prices higher, further limiting food access. It is expected that the consumption of wild foods and likely humanitarian assistance, despite an unknown response, will help the most vulnerable households sustain their lives. On a positive side, even with forecasted erratic rainfall, the level of planting, if there are sufficient seeds and rainfall amounts, could be at atypically higher levels to make up for the previous poor season. Though the rainfall will increase availability of seasonal wild foods, improving food availability, food gaps will persist until crops are harvested in March/April 2019, beyond the scenario period. Crisis (IPC Phase 3) outcomes are expected to persist across the zone, with only the most vulnerable households, particularly in Chigubo District, likely to potentially face more severe outcomes in the absence of sustained humanitarian assistance.

*For a more detailed description of the analysis, please see the Scenario Summary Table for this area of concern.*

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

**Current Situation**

This is another zone of concern, which was also affected by dryness and pest infestations, particularly FAW. However, based on WRSI for maize grain and data collected by SETSAN during the March/April food security assessment, the level of food unavailability and access is not as constrained as compared to Livelihood Zone 22. WRSI shows there was main season crop failure in parts of Mágoe and Cahora Bassa districts of Tete Province, and poor crop conditions across much of the rest of the zone, which was confirmed by local agricultural authorities. Some harvest was only possible in small lowland areas. Since there was not a typical replenishment with the harvest, the majority of poor households are relying on market purchases for their basic food needs. Wild foods are primarily gathered for sale but are also being consumed, and fishing is an important food and income source, if accessible. As in the other area of concern, there are below-average agricultural labor opportunities, particularly as second season production is limited to small islands along the Zambezi River. However, a reported infestation of FAW has severely affected second season maize crops.

As this zone is a high goat breeding area, livestock sales for needed cash are more feasible for some poor households in this zone compared to the other area of concern, but livestock holdings remain low. Poor households, if they have the required skills and ability, are intensifying their engagement in self-employment to compensate for the inability to sell staple
crops, but competition has reduced earning opportunities, constraining purchasing power. In Tete, the major reference market in the zone, the maize supply is adequate, but in local markets it is below average. In addition, May maize grain prices in Tete were higher than last year’s prices by 16 percent but the same as the five-year average.

Currently, the most vulnerable population in the zone are poor households in southern Tete, who are removed from major markets and cannot access lowland areas. They are already facing food gaps and Crisis (IPC Phase 3) outcomes. As a result, they are trying to cover their food gaps by consuming less preferred and non-recommended wild foods. However, the majority of poor households in the zone are currently still able to meet their minimum food requirements but are forgoing essential non-food needs. They are facing Stressed (IPC Phase 2) outcomes, which reflects the current area classification for the zone. According to the May 2018 SETSAN acute IPC analysis, during the time of the assessment in April, 11 percent of households had Poor food consumption and 42 percent had borderline food consumption, which was not as severe as Livelihood Zone 22. In June, WFP assisted more than 121,000 people in central areas of Mozambique, including in this zone, but exact numbers are unknown. The very poor and poor account for nearly 602,000 people in the zone, so the numbers being assisted in this zone are likely quite low but perhaps slightly better than Livelihood Zone 22.

Assumptions

In addition to the National level assumptions, the following assumptions apply to this area of concern:

- **Reduced maize grain flows within and into the zone.** While Tete market will remain well-supplied from northern Tete producer areas through informal and formal trade during the scenario period, the other local markets within the zone will be either undersupplied or only relatively well-supplied but with abnormally higher prices.

- **Maize prices.** Based on an analysis of current prices and drivers, FEWS NET’s integrated price projections for the national reference market of Tete show that maize prices through August are expected to remain at their lowest levels and will then gradually and seasonally increase, peaking in January 2019. Throughout the scenario period, on average, prices are expected to remain below the five-year average by 11 percent and above last year’s prices by 36 percent. However, in the remote areas away from Tete market, maize grain prices will be abnormally much higher than the projected prices in Tete.

**Most Likely Food Security Outcomes**

Beginning in July, food availability and access are likely to be further constrained, and the majority of poor households, particularly in northern areas of the zone, will move from Stressed (IPC Phase 2) to Crisis (IPC Phase 3), as they are either depleting their livelihood assets to meet their minimum food needs or are already facing food gaps. Initially they will continue to expand some of their typical livelihood strategies, including consuming wild foods and opting for less preferred foods, but this will be three to four months earlier than normal. However, their main source of food will still be from market purchases through the end of September. Above-average staple food prices outside of Tete City, combined with limited income from casual labor and self-employment, is expected to limit purchasing power. Some households, who have poultry or small-sized livestock, will sell their animals to make needed food purchases. By September, poor households are likely to employ some crisis coping strategies, such as skipping meals or reducing the quantity. Although illegal in some protected areas, hunting is expected to be a growing food source for poor households in remote areas of the zone. As the rainy season and typical lean period begins in November, additional households are likely to face food gaps. With continued low household incomes, even for agricultural labor activities, the local market food supply is expected to fall and staple food prices are likely to rise further in remote markets. It is possible that some areas in the zone may receive average rainfall, while others below-average amounts, so there could be some differences in agricultural labor demand. Regardless, consumption of wild foods, which will improve with the rains, and likely humanitarian assistance, despite an unknown response, will help the most vulnerable households sustain their lives. Crisis (IPC Phase 3) outcomes are expected to persist in the zone through the entire scenario period and until the harvest in April 2019. The only exception is in Tambara and Guro districts in Manica Province, which had higher levels of 2017/18 crop production, but still below average, and are likely to remain in Stressed (IPC Phase 2).

*For a more detailed description of the analysis, please see the Scenario Summary Table for this area of concern.*
## 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>National</td>
<td>Average to above-average rainfall</td>
<td>• Timely onset, well-distributed and average to above-average rainfall would change the projected scenario in a positive way by providing more wild foods and other seasonal crops, increasing household food availability and consumption. Also near-average agricultural labor opportunities would be more likely, and there would be better pasture and water availability. Green food could potentially be harvested as early as January, improving outcomes beyond the scenario period. Regardless, food assistance would still be needed until the March/April 2019 harvest.</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 the deficit areas, local markets would be undersupplied. This would push staple food prices higher than current expectations. Food deficits, especially for poor households, would expand.</td>
</tr>
<tr>
<td></td>
<td>Inadequate humanitarian assistance</td>
<td>• An inadequate response to humanitarian assistance needs would mean a greater number of poorer households would face larger food gaps and a potential deterioration in acute malnutrition. There is the possibility that an area, particularly Chigubo District in Gaza Province at the peak of the lean season, could face even more severe outcomes than initially projected.</td>
</tr>
<tr>
<td>National</td>
<td>Severe flooding</td>
<td>• Severe flooding in January 2019 would negatively affect poor households in the major river basins, particularly in the north of the country, but also in the coastal 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>
</tbody>
</table>

## 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.