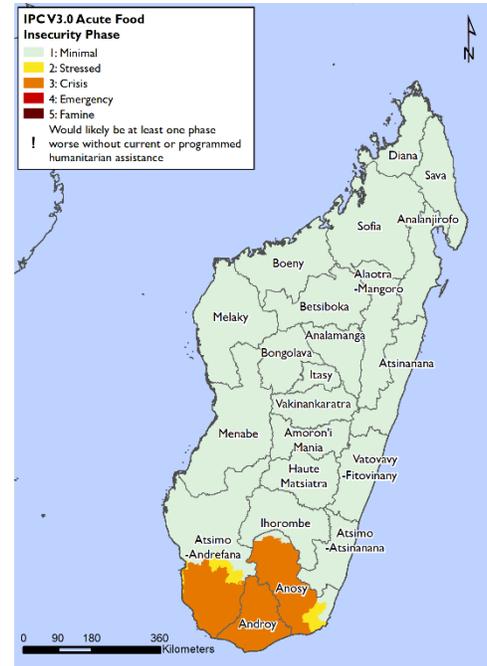


Second consecutive below-average season in southern Madagascar drives high 2021 needs

KEY MESSAGES

- Over the past six years (2015/16-2020/21) southern Madagascar has experienced five below-average rainy seasons. The past two consecutive below-average seasons have led to a severe reduction in staple food production and declined livestock herd size and body condition. Poor households' 2019/20 food stocks ran out in September, two months earlier than usual, and crops from the 2020/21 season will not be available until May and will likely be below average. Available information suggests poor households are selling more livestock and other productive assets for income to purchase food, and food aid through January helped mitigate consumption deficits for some households. Overall low income coupled with high staple food prices will continue to drive Crisis (IPC Phase 3) outcomes in much of southern Madagascar even during the 2021 harvest.
- Since January 2021, tropical storms Chalane and Eloise made landfall in Madagascar and provided heavy, temporarily favorable rainfall across northern and central areas for the current cropping season. Despite some damage to homes and infrastructure and localized floods, impact was negligible compared to the 2019/20 cyclone season. With three months remaining in the season, there remains the potential for additional storms to make landfall on the island, which could lead to flooding and negatively affect the cropping season.
- The indirect impacts of the COVID-19 pandemic persist, in particular in urban areas where prices remain above average and income earning opportunities are low. Unemployment remains high as many small and medium-sized enterprises remain closed. There are also fewer opportunities for seasonal migrants to earn income, and income from mining, textiles, and tourism is very low due to sustained low international demand. While most households in Toliara, Toamasina, and Antananarivo are still able to meet their basic food and non-food needs, worst-affected very poor households are likely to face Stressed (IPC Phase 2) food security outcomes from February to May.

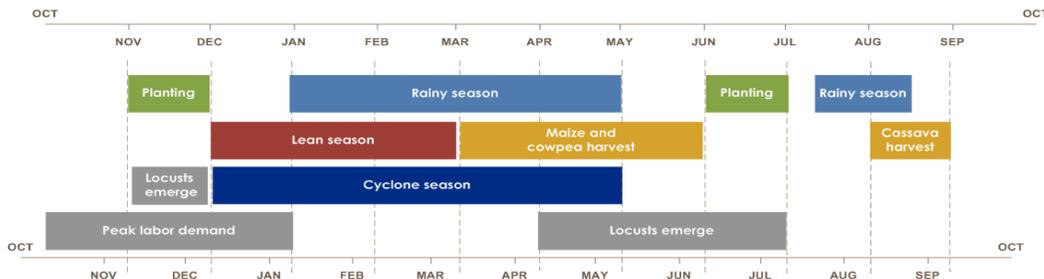
Current food security outcomes, February 2021



Source: FEWS NET

FEWS NET classification is IPC-compatible. IPC-compatible analysis follows key IPC protocols but does not necessarily reflect the consensus of national food security partners.

SEASONAL CALENDAR FOR A TYPICAL YEAR



Source: FEWS NET

NATIONAL OVERVIEW

Current situation

COVID-19 update: The official cumulative number of confirmed COVID-19 cases in Madagascar was 19,831 and 297 deaths as of February 28. After increasing throughout January, the number of weekly new cases decreased throughout February. Since early February, nurses have been on strike over lack of COVID-19 compensation, leaving just minimum personnel providing care in hospitals. No new movement restrictions or curfews have been imposed and the government has decided to not order vaccines, citing low case levels.

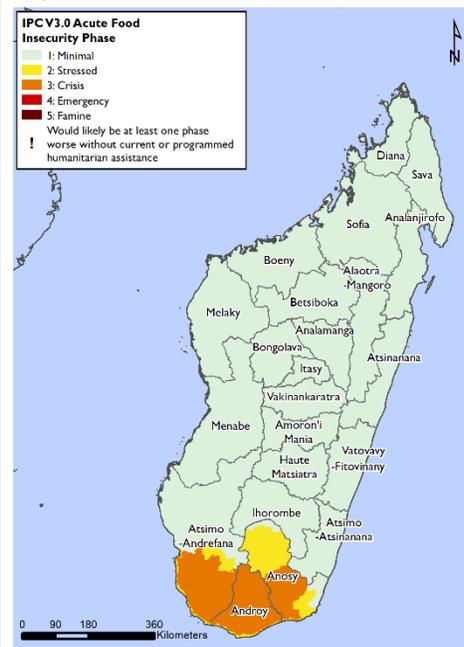
Rainy season and cropping progress: In northern Madagascar, the October to March rainfall season was near average and with normal distribution, allowing households to plant as normal. However, below-normal cumulative rainfall has been recorded in southern and parts of central Madagascar between October 2020 and February 2021, particularly in Alaotra Manogoro, Analamanga, Haute Matsiatra, and Ihorombe. The most severe rainfall deficit occurred at the start of the cropping season (the last quarter of 2020 and in early January 2021). Cropping conditions have been particularly poor in the south, as a result of these rainfall deficits. More than half of both planted and stored cuttings of cassava were destroyed by the heat and dry conditions from October to January, according to the preliminary ECDASA results. In addition, many poor households sowed maize and pulses several times with the onset of rainfall. Though given insufficient rainfall through February, crops did not develop, and ground information suggests that many households no longer have additional resources to replant.

Staple food production: The rainfall deficit also severely impacted the performance of the early season rice in central and southern areas. In Alaotra Mangoro and Analamanga regions, key informants estimate that early season local rice harvests in December 2020 and January 2021 were 75 percent below average. As for the south, preliminary results from the rapid-CFSAM and ECDASA show that early local rice production in MG22 and MG20 is 50 percent below the five-year average, except in Betsiboka district where local rice production increased slightly compared to last year due to improvements to irrigation infrastructure. Furthermore, because of delayed rainfall across the south, green harvests of maize, squash, pulses, and availability of several wild foods typically consumed from December to February were reduced by more than 80 percent compared to last year, except in very localized areas surrounding large rivers (Linta, Menarandra, Onilahy and Mandrare Rivers).

Rice imports: During the last quarter of 2020, rice imports (measured by value) increased by 75 percent compared to the same period in 2019. In total, the annual value of rice imports increased by 27 percent in 2020 compared to the 2019 marketing year. Three main factors explain this increase. First, as a response to COVID-19 economic impacts, the government continues to import low-cost rice. Second, due to significantly decreased 2019/20 staple production in the south, there was increased demand for imported rice. Finally, the government and private sector anticipated that poor October-December 2020 rainfall would again drive higher demand for imported rice and imported more rice in December than is typical.

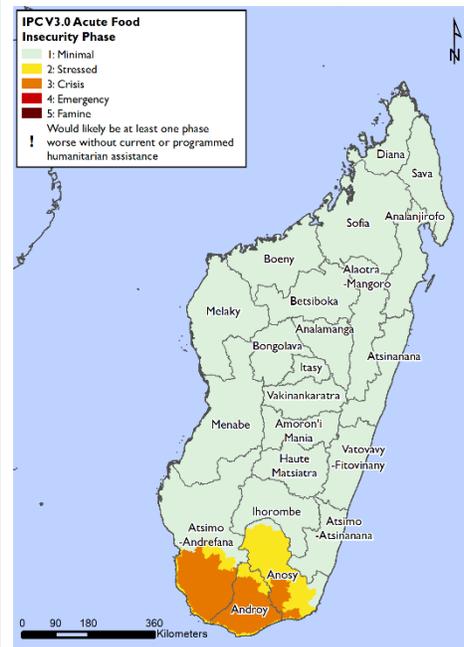
Export cash crops: Driven by the effects of COVID-19 and reduced international demand, the aggregate value of exports in 2020 decreased by 23 percent compared to the 2019 marketing year, which led to a reduction in small producers' income and government revenue. In addition to mining (53 percent decrease) and textiles (11 percent decrease), vanilla and other cash

Projected food security outcomes, February to May 2021



Source: FEWS NET

Projected food security outcomes, June to September 2021



Source: FEWS NET

FEWS NET classification is [IPC-compatible](#). [IPC-compatible](#) analysis follows key IPC protocols but does not necessarily reflect the consensus of national food security partners.

crops (litchi, cloves, etc.) decreased by 10 percent and 7 percent, respectively, compared to 2019. The government set the vanilla price at USD 350/kg, which is 50 percent below the 2018/19 price but still high compared to other countries. As a result, international traders prefer to purchase cheaper, often higher quality, vanilla elsewhere.

Livestock in the south: Following the poor 2019/20 cropping season, almost all households across wealth groups are selling more livestock (cattle, small ruminants, and poultry) than usual to meet needs. Hence, herd size has been below average throughout the 2020/21 cropping year despite new births and purchasing from other districts as livestock sales increased significantly compared to the previous year. In fact, in a typical year, herd size would not begin decreasing until November, in 2020 herd size began decreasing in September 2020, two months early. Furthermore, the rainfall deficit between October 2020 and mid-January 2021, negatively affected body condition, and number of births, and increased livestock deaths. Currently, herd sizes (cattle and small ruminants) are about 40 percent lower than last year. In February 2021, several households prefer to sell their small ruminants rather than to pay MGA 3,000 per day per head to feed them. As a result, the supply of small ruminants has increased on markets and the price has decreased 75 percent compared to the baseline year (2017/2018). As for cattle, while prices in large urban markets outside of the south are stable, prices in Tulear market decreased by 25 percent compared to last year. Other district-level markets reported price decreases of more than 50 percent compared to last year according to the qualitative information from rapid-CFSAM and ECDASA 2021.

Green harvest and wild food availability: The green harvest of pumpkin, watermelon, muskmelon, and cassava/sweet potatoes leaves were below average due to drought conditions at the end of 2020. Yellow cactus fruit is also less available due to the drought and more poor and very poor household are consuming atypical wild foods like wild nuts, cactus leaves, tamarind, and wild tubers, according to the preliminary ECDASA results. Those wild foods are considered less comestible and more dangerous for children as well as for pregnant and lactating women and their consumption is considered a signal of atypical coping due to low food access.

Cyclone season: Since January 2021, two tropical storms, Chalane and Eloise, made landfall in Madagascar and provided heavy but temporary rainfall, favorable for the current cropping season. Despite some damaged homes, infrastructure, and localized floods, impacts were negligible compared to the 2019/20 cyclone season. The Intertropical Convergence Zone also began its movement across Madagascar starting in mid-February, bringing increased rainfall and significantly increasing the depth of the main river around Antananarivo. BNGRC declared that the capital is under red alert (imminent danger) as a result. In total, the cumulative number of displaced people since the start of the current cyclone season is estimated at around 2,500.

Macroeconomic context: Between March-Oct 2020 the value of the MGA depreciated eight percent, it strengthened slightly vis a vis USD from October 2020 to January 2021 but remains below its January 2020 value. Currency depreciation since January 2020 has had negative impacts on domestic prices of imported food and non-food items and is hampering purchasing power of local producers. According to INSTAT, the Consumer Price Index in Madagascar increased by 0.4 percent on average per month in 2020. The national inflation rate was five percent between November 2019 and November 2020. At the national level, rice price inflation was three percent.

Fall Army Worm (FAW) infestation: In northern and central Madagascar, the level of FAW infestation between November 2020 and February 2021 was below normal. In addition, households have adapted and improved their strategies (knowledge of the treatment period, chemical and biological treatment, other technical capacities) since FAW first appeared in 2018. Nevertheless, 15 to 25 percent of maize producers preferred to cultivate other commodities to avoid FAW infestation. Contrarily, in the south, favorable rainfall combined with high temperatures between the end of January and mid-February created conditions favorable to infestation. More than 50 percent of new maize plants sowed since the end of January 2021 have been destroyed by FAW, according to the preliminary ECDASA results. Maize cultivated in the south is primarily used for livestock feed, FAW destroys the maize grain, but the rest of the plant can still be used as feed.

Humanitarian assistance: Currently, all large-scale humanitarian assistance has ceased as is the typical end of the lean season. There were some small-scale distributions of humanitarian food assistance in February; however, it's estimated that no more than 10 percent of the population in each district received a 15-day ration. Some activities like resilience, social protection, agriculture, school feeding, and nutrition cover the majority of the district. These activities provide nutritional food, cash for agricultural and non-food items (like education items, agricultural equipment, seeds, etc.) to specific beneficiaries (vulnerable groups, association of farmers, pregnant and lactating women, child under five, etc.).

Migration and remittances: Above-average migration from the south is ongoing, with many households sending one or more family members to urban centers further north. However, there are few opportunities in urban areas (Toliara, Majunga, and Tamatave) because of COVID-19 related impacts. Middle and better-off households prefer to reduce their expenditures linked to services from very poor and migrant households. Most small and medium enterprises in the formal and informal sector that closed during the crisis are still closed. This results in a high rate of unemployment in urban areas. As for rural areas, migrants

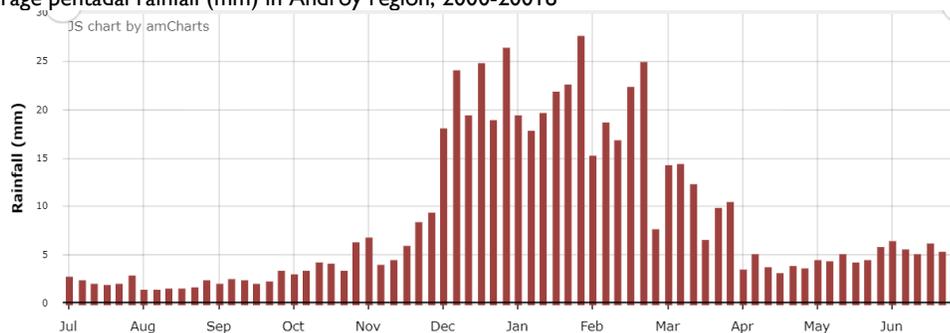
seeking opportunities in the productive northern and western parts of the country (Boeny, Sofia, SAVA, DIANA, and Menabe) are driving high localized labor supply. Migrants include those from the southeast, who typically earn income in the cash crop sector, those affected by drought in the south, and those most affected by COVID-19 (areas around the capital). The remittances received by very poor households are lower than average.

Assumptions

The most likely scenario for February to September 2021 period is based on the following national level assumptions.

- 2019/20 rainy season:** From February to March 2021, cumulative rainfall across central and northern Madagascar is expected to be average, supporting normal cultivation of rice and cash crops. Below-average cumulative rainfall is expected across southern Madagascar. In the south, since rainfall didn't begin in earnest until the first dekad of February, the main cropping season for maize, pulses, and sweet potatoes began three months late. Between March and June, rainfall is forecast to be average, according to NMME and Direction Générale de la Météorologie (DGM) forecasts. However, the March to June period receives, on average, 5 to 10mm of rainfall per pentad, less rainfall than the normal cropping period, December to February, when rainfall typically totals around 20 mm per pentad (**Figure 1**). Therefore, it's expected that March to June rainfall will not be sufficient for normal maize, pulse, and sweet potato development. For cassava, however, those households which still have viable cuttings will be able to plant at the end of February/start of March and, with average forecasted rainfall, could see sufficient rainfall for the start of crop development.

Figure 1. Average pentadal rainfall (mm) in Androy region, 2000-20018



Source: USGS

- Cyclone:** In the October 2020 National Climate Outlook Forum (NCOF), the DGM predicted above-normal cyclone activity during the 2020/21 season, with three to five events that could threaten the east and west coasts with one to two direct impacts, one of which could be high intensity. With three months remaining in the season, there remains the potential for additional storms to make landfall on the island, leading to flooding and negatively affecting the cropping season.
- Rice production:** Nationally, the intermediate and early rice harvest between January and March is expected to be 70 percent below last year and 25 percent below the five-year average due to rainfall deficits in southern and central areas from October to mid-January. Nationally, main season rice production is expected to be 10 percent lower than last year, which was near average. Upland rice cropped area will be very limited and April-May production is expected to decrease by 50 percent due to lack of rainfall in the highlands from November to mid-January. However, with the expected normal rainfall during the first quarter of 2021, the main irrigated rice harvest, which makes up about 80 percent of national rice production, will be slightly above last year but still below the five-year average.
- Other staple food production:** As a result of below-normal rainfall between October and mid-January, maize and cassava production is expected to be below last year but near the five-year average. In the south, green harvests (maize, watermelon, cassava, etc.) are expected to reduce by more than 80 percent due to below-average rainfall and limited means (financial, seeds, materials, etc.) following last year's poor harvest and the impacts of COVID-19 restrictions, namely reduced incomes earning opportunities since March 2020.
- Rice imports:** Rice imports are expected to be above average, between 50,000 and 80,000 MT per month, from March to June 2021, much of which will be used as government low-cost rice and humanitarian food assistance. Elevated rice imports are driven by demand from the government, humanitarian organizations, as well as the private sector to meet demands following the poor harvest last year in the south, combined with falling production at the national level expected for the 2020/21 cropping season. Monthly imports will likely decrease between July and September,

with the main harvest, but will likely remain near average between 10,000 and 20,000 MT per month. More than 600,000 MT of rice will likely be imported in the 2020/21 marketing year.

- **Pests:** The impact of FAW on maize crops will likely be similar to the past three years with the expected normal rainfall from March-May. The impact of locust on staple crops will be limited following the drought period before February and aided by the government monitoring and the locust early treatment program. In the south, vegetable and pulse crops will be affected by several typical insects from February to April. With limited access to pesticides, the impact of the below-average rainfall combined with pests, vegetable and pulse production is expected to be more than 50 percent below the five-year average, according to key informants.
- **Humanitarian assistance:** General food and cash distributions will likely continue in only a few communes and reach less than 10 percent of the population across the extreme south through May 2021.
- **Exports and exchange rate:** Aggregate national exports will likely be below the five-year average due to lower demand, driven by reduced mining and cash crop exports. In addition, tourism will be below normal with borders likely to remain closed throughout the outlook period. Considering the high demand for food and non-food imports, the value of MGA will likely depreciate further until the second quarter of 2021. Currency depreciation will drive up prices of imported goods especially rice.
- **Livestock movements and prices:** Nationally, cattle herds will seasonally decline until May 2021, due to high demand and high prices in large urban centers. In addition, the drought conditions from October to January in the south negatively impacted on birth rates and livestock body conditions thereby affecting herd sizes. However, this will mostly impact poor and middle households who will sell livestock to the better off households in the same areas for income. While livestock prices in large urban markets will likely be similar to last year levels and higher than the five-year average through September, prices in remote areas of the south will remain as low as last year prices and below the five-year average as these households cannot directly access large urban markets where prices are more favorable. Particularly for poor households who depend on poultry and at most two goats, between March and May, income from livestock sales will be below average due to lower prices and low herd size. They will buy very few poultry during the harvest period in June-July. In August-September, they will begin selling their poultry again.
- **Labor demand, migration, wages, and remittances:** During the outlook period, in urban areas, income-earning opportunities will remain below average because of COVID-19 related impacts. Wages, however, will likely remain near average because they are already relatively low, just barely enough to buy daily food and non-food needs. Petty trade and services as well as urban transport (bus and rickshaw) will be less profitable than usual. In rural areas, excluding the south, labor demand linked to agriculture will likely remain near-average because of the average forecasted growing conditions. Agricultural labor wages will likely be below-average because of increased labor supply from the south where an atypical migration is expected to western and northern areas. Remittances per household will be lower than average, particularly for the southern migrants, who depend heavily on remittances in drought years, and are more numerous than usual and more recent than other migrants.
- **COVID-19 pandemic and restrictions:** Despite an increase in cases since January 2021, after lifting most restrictions from the end of October 2020, it's likely that the government will implement localized restrictions in areas where cases are increasing at high rates before re-implementing national restrictions or banning regional travel. However, impacts on tourism, cash crops, and mines will remain similar to last year due to low international demand.
- **Cash crop exports:** Following the global economic impacts of COVID-19, the demand for vanilla exports – a key cash crop and main foreign exchange earner for Madagascar – is expected to remain below average. While production is above average, the quality is relatively poor, and buyers will likely be more attracted to cheaper vanilla prices in other countries. Overall, small producers' income and government revenue from this source will be below average.
- **Domestic trade flows:** Due to expected below-average staple food production (rice, cassava, and sweet potatoes) in the traditionally surplus areas in the south, wholesalers will rely on other production areas, further north, like Andonaka and Fianarantsoa and will drive prices up in those markets. However, from August to November 2020, cassava production in Betioky was exceptionally high compared to the last year and the five-year average as result of favorable rainfall and extended cropped area in September-December 2019. Medium and small traders from other districts in the big south will temporarily buy from Betioky until April 2021.
- **Staple price:** According to the FEWS NET price projections, local rice prices in Antananarivo will continue increasing in February 2021 before low-cost rice from the government program will begin supplying markets in quantities by the

end of February. Prices will start to decrease as the harvest progresses until June 2021. In Toliara, imported rice will remain around 2,500 MGA/kg (50 percent above the five-year-average) due to below-normal local rice production in 2020 as well as the expected poor rice production in the south as a result of the rainfall deficit from October to mid-January. In the south, staple food prices will be higher than the five-year average especially in Ampanihy and Ambovombe where maize and dried cassava prices will be just slightly above the already elevated 2020 price levels, only during the peak of the harvest in May 2021.

Most likely Food Security Outcomes

Generally, at the national level, as staple production and food supply is near normal, most poor households will meet their basic food needs and experience None (IPC Phase 1) acute food insecurity from February through September 2021. However, some districts in the south (MG20 and the MG22 part of Betioky) affected only slightly by the drought conditions, including minor decreases in early rice production, pastures, and agricultural labor opportunities. As a result, these districts will likely experience Stressed (IPC Phase 2) food security outcomes. In addition, poor households throughout the country working in the tourism, informal mining, and cash crop sectors have experienced significantly reduced income since March 2020 and are therefore expected to face Stressed (IPC Phase 2) acute food insecurity from February to September. Additionally, a segment of the population, about 25 percent of poor and very poor households in the four districts in the south-east (Manakara, Vohipeno, Farafangana and Vangaindrano) are reportedly consuming wild food collected in the forest due to high food prices. This population will likely face Stressed (IPC Phase 2) acute food insecurity in February. Food access will likely improve with the early and main harvest, after which poor households will likely face None (IPC Phase 1) through September.

Across Androy region, and Ampanihy, Betioky, and Amboasary districts, the two successive rainfall deficits led to a severe reduction of staple food production, herd size, and body condition of livestock in the south. Across these areas, 2019/20 food stocks have run out. Furthermore, early and green harvests in January and February amounted to nearly zero, and the main harvest expected from May to September 2021 will likely be severely reduced. As a result, poor and very poor households, facing low incomes and limited food sources, are likely to face at least slight to moderate food consumption gaps during the projection period, even with the slight improvement expected during the harvest period in June-September. In addition, poor and very poor households are forced to sell more livestock and other productive assets and will consume immature cassava as well as cereal and pulse seeds. Thus, these areas are expected to experience Crisis (IPC Phase 3) food security outcomes from February to September 2021. Very poor households that have been heavily impacted by drought and without the financial means for a family member to migrate north and therefore have very limited income earning opportunities will adopt emergency coping strategies such as selling their last female poultry. This population is expected to face Emergency (IPC Phase 4) outcomes through the outlook period.

The northern part of the district of Ambovombe, Bekily, and Amboasary within MG22 will experience Crisis (IPC Phase 3) food security outcomes from February to May driven by the two successive droughts, which severely reduced 2019/20 rice production as well as cassava and onion production from June to December 2020 compared to the five-year average. Poor production reduced food access and income earning opportunities. In addition, as a result of the recent rainfall deficit, the start of the main rice and maize harvest will be delayed two months and will be moderately lower than the average. Subsequently, Crisis (IPC Phase 3) food security outcomes will persist until May. During the rice, cassava, and onion harvest in June-September, poor and very poor households will likely improve their food consumption and their livestock herd size and body condition and will experience Stressed (IPC Phase 2) acute food insecurity due to rice harvests, allowing poor households to achieve minimally adequate food consumption and avoid having to depend on crisis coping strategies.

EVENTS THAT MIGHT CHANGE THE OUTLOOK

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

Areas	Events	Impact on food security
National	Cyclone	2020/2021 cyclones will continue until April. Potentially powerful cyclones are still forecasted from the Northwest, which will likely improve rainfall projections along the western and southwestern parts of the island but may damage and flood rice fields and cash crops in northern areas. Depending on the strength of the cyclone, food insecurity in the affected areas may deteriorate.
Urban areas	Re-implementation of COVID-19 restrictions	Reduced movement between regions and limited labor migration and remittances will worsen food security outcomes to Stressed (IPC Phase 2) with populations in Crisis (IPC Phase 3) in some urban areas which are already in lean season.

AREAS OF CONCERN

Mahafaly Plain: Cassava, Goats and Cattle (MG 23) - Ampanihy district

The area of interest constitutes 80 percent of the territory of Ampanihy district, excluding the northwest part of MG22 and the coastal fokontany in MG27 (Figure 2). It is one of the driest areas in the country. The poverty accentuated by the different phases of drought before and after El-Niño (2015-2016) illustrates a very high level of vulnerability to economic shocks. Selling of assets has also been observed, with an estimated 45 percent of the population no longer own livestock according to the HEA baseline study in 2017. Approximately 45 percent of the population in the zone are very poor according to the HEA Baseline report in 2017, totaling about 184,000 individuals.

Current Situation

Rainy season: Cumulative rainfall between October 2020 and January 2021 was lower than the five-year average and erratically distributed (Figure 3). The first significant rainfall, allowing for agriculture activities to begin in earnest, occurred at the end of January and early February. As a result, green harvests of watermelon, maize, and early varieties of pulses consumed in January and February, were in very low quantity. As for the main harvest, repetitive sowing of maize and pulses occurred between October 2020 and February 2021 because of false starts to the rainy season. Drought conditions and high temperatures destroyed both planted cassava and stored cuttings. Subsequently, availability of seeds and tuber cuttings is very low, and prices are very high in February. With the first significant rainfall at the end of January and early February, the main cropping season for maize and pulses is now affected by the lack of physical and financial means following last year's poor harvest as well as repetitive cropping this year.

Recent harvests and food stocks: Food stocks from own production have depleted for the majority of very poor and poor households. Currently, almost all very poor and poor households do not have stocks from their own production and depend on markets. Own production stocks were depleted earlier than usual last year because the latest cassava production in the area reduced by 30 percent compared to the previous year due to a rainfall deficit during the first quarter of 2020. In addition, the 2019/20 rainfall deficit also reduced other staple food production like maize, pulses, and sweet potatoes by more than 75 percent compared to 2018/19 production, according to preliminary result of the CFSAM. As a result, households depended heavily on the consumption of fresh cassava and immature tubers from April to July 2020, reducing the total volume of dried cassava available for current lean season, starting in October 2020.

Market supplies: Market accessibility is generally good due to relatively average road conditions, the result of below-average rainfall to date. However, in January, maize prices were 56 percent above the five-year average, driven by high demand for seeds during the rainy season. As for dried cassava, prices increased by 10 percent compared to last year and were 45 percent above the five-year-average in January. High cassava prices are due to the overall impact of the 2020 drought on rice, cassava, and maize in the south.

Food sources: Below-normal rainfall from October 2020 to January 2021 significantly reduced the availability of watermelon and yellow cactus fruit in January and February. Very poor households, therefore, currently consume more wild tubers, red cactus fruit, and more wild fruits than usual as the green harvest is absent and they have limited means to buy staple foods on the market. Other food sources like purchasing, gifts, remittances, and humanitarian assistance are largely below baseline levels due to the global impact of the drought across the big south and across all wealth group.

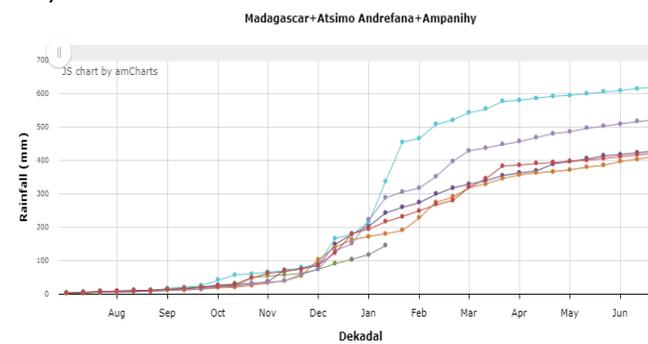
Income sources: Very poor households depend on daily agricultural labor and livestock tending for better-off households with below-average opportunities due to the rainfall deficit, affecting all wealth groups. Despite low

Figure 2. Location of the Mahafaly Plain: Cassava, Goats and Cattle livelihood zone



Source: FEWS NET

Figure 3. Cumulative rainfall in Ampanihy district in 2020/2021 rainy season



Source: USGS/NOAA

opportunities, wages in Ampanihy are stable and near the five-year average (MGA 3,000 per day). Additionally, mining, charcoal/firewood, and other forms of forest exploitation fill the gap but will earn less income than usual during the scenario period with the global and regional economic recession following the COVID-19 pandemic and the effects of the drought. Furthermore, even though unpaid debt from 2020 is still high, very poor households continue to borrow money to meet needs.

Migration and remittances: Above-average migration from the Ampanihy district is ongoing, with many households sending one or more family members to urban centers further north. However, there are few opportunities in urban areas (Toliara, Majunga, and Tamatave) because of COVID-19 related impacts. Middle and better-off households prefer to reduce expenditures linked to services from very poor and migrant households. Most of the small and medium enterprises in the formal and informal sector that closed during the crisis are still closed today, resulting in high rates of unemployment in urban areas. In rural northern and western parts of the country (Boeny, Sofia, SAVA, DIANA and Menabe), there are also few opportunities for agricultural work and high supply as migrants from many parts of the island search for income opportunities. Remittances (per household) in Ampanihy are lower than the baseline level (2017-2018).

Livestock: Between 2017 and 2019, very poor households re-stocked their small ruminants. However, following the rainfall deficit during the first and last trimesters of 2020 and the impact on livelihoods (selling, few births, and disease), livestock holdings have reduced, and households depend on just a few poultry. For middle and better-off households, cattle herd size and body condition also reduced as a result of the drought. Cattle prices are 50 percent below the three-year average according to the qualitative information from the ECDASA 2021.

Water availability and pasture conditions: According the WASH Cluster, several areas in Ampanihy district were classified in Alert and in Emergency in December 2020. The situation worsened compared to previous months. In addition, groundwater monitoring shows that, in December, the availability of spring drinking water is still very low and decreasing. A 20-litre tin of water cost MGA 1,000 in remote area, 25 percent above the last year price in the same area. Furthermore, pastures are poor and vegetation did not re-generate well due to drought. The NDVI anomaly indicated that vegetation in the south is less than 60 percent of median year (**Figure 4**).

Humanitarian assistance

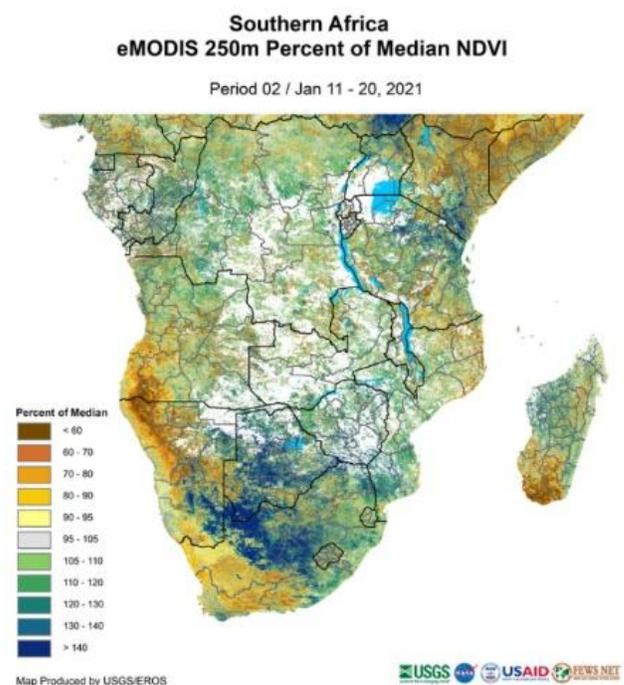
In February, all large-scale humanitarian assistance that had been ongoing ceased. ADRA, CRS and WFP distributed 15 days rations only for a few fokontany and limited the number of beneficiaries. However, some activities like resilience, social protection, agriculture, school feeding, and nutrition cover the majority of the *fokontany* but with few beneficiaries. Those activities provide food, cash, and non-food items.

Assumptions

The most likely scenario for the February to September 2021 period is based on the following zone level assumptions.

- **Rainy season progress:** Overall below-average rainfall is expected from October 2020 to March 2021 due to the rainfall deficit during the last quarter of 2020. However, the majority of rainfall this season occurred during the first dekad of February and marked the three-month delayed start of the cropping season for maize, pulses, and sweet potatoes. For the period April to June, NMME forecasts average rainfall but it will likely be insufficient for crop development given the three-month delay in planting. In addition, the main cropping season is and will continue to be severely impacted by lack of seeds and pest infestation from February to May 2021. As a result, localized production will be 20 percent less than the five-year average. The rainfall deficit and low availability of cuttings will reduce cassava production. Fresh cassava, which is typically harvested in May, will be reduced to almost zero and cassava typically harvested between June and August will be reduced

Figure 4. Percent of median NDVI, January 2021

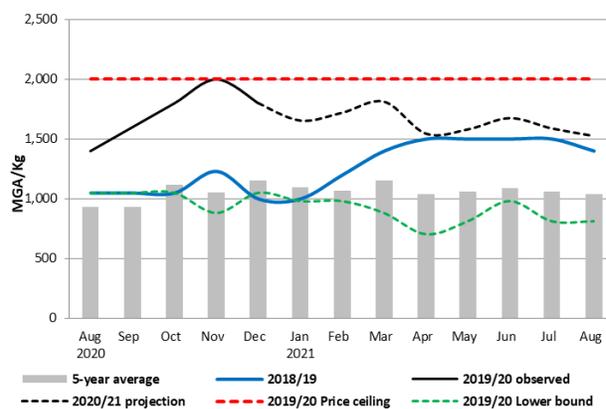


Source: USGS

by 50 percent because several households will decide not to plant, waiting for next year instead. Sweet potato production will be below average as well, only wealthy households who have land on the banks of large rivers will have favorable production.

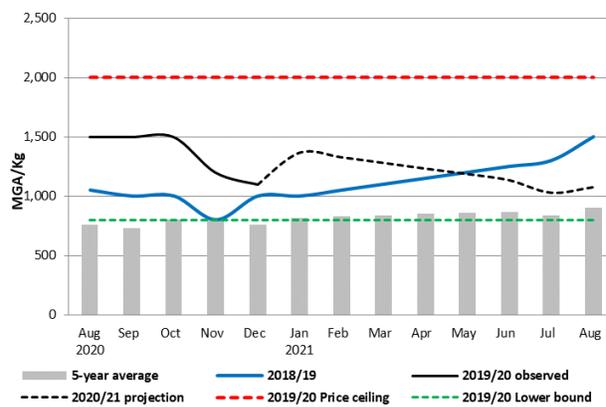
- Pests:** FAW will infest new maize crops from February to May 2021 with normal expected rainfall. In addition, poor and very poor households do not have access to adequate means of treatment. The level of infestation will likely remain as high as last year (more than 75 percent).
- Market supply:** Road conditions will deteriorate significantly with the onset of the rainy period from February to May and affect market functioning and accessibility. Remote markets, specifically, will see fewer traders, reduced frequency of supply, and high transport costs. In addition, as dried cassava stocks in Betioky depleted significantly in January, wholesalers will change to suppliers in Toliara, Andonaka, Ambalavao, and Fianarantsoa from February to May 2021 and prices will increase despite quality deterioration.
- Food sources:** From February to May 2021, in addition to limited food purchases, poor and very poor households will rely more on wild food and borrowing food on credit because their purchasing power is lower than average. However, yellow cactus fruit will be less available than usual, and its price will be slightly higher because of the rainfall deficit between October 2020 and January 2021. From June to September 2021, with the main harvest of maize (May-June) and cassava (July-September), consumption of wild food will slightly decrease but market dependence of poor and very poor households will remain high because the consumption from own production will be very low (less than a one-month ration), especially for cassava.
- Income sources:** From February to May 2021, the main source of income will be the sale of small ruminants (goat and sheep) and meat for middle and better-off households and poultry for the poor. The sale of wild foods for middle and better-off households across the south will also earn more income from March to May, compared to February, for poorer households with average forecasted rainfall in February and March. In addition, poor and very poor households will rely on daily labor wages (agricultural labor, livestock tending, and other services) and charcoal/firewood activities with fewer opportunities. Some poor households will borrow money from the better-off households. From June to September, sweet potato and cassava harvesting labor will earn more income for poor households compared to February to May, in addition to their own production. However, those opportunities will likely be below average as tuber production is expected to be below average.
- Prices:** In January, dried cassava prices increased because of high demand and depleting supplies from Betioky stocks. According to FEWS NET projections, from February to May, dried cassava prices will remain above 1,000 MGA but trend downward until May when substitutes become available (maize from surplus areas, and rice from MG22). From June to September, with the first harvest of fresh cassava, the price of dried cassava will decrease significantly but will remain above the five-year average due to the rainfall deficit in the last quarter of 2020 (**Figure 5**). As for maize, prices significantly increased at the national level and in the south, reaching similar levels as those observed three years ago in Ampanihy market when the crop was affected by FAW. The rainfall deficit between October 2020 and January 2021 also drove upward pressure on prices. High demand for

Figure 5. Integrated price projection of maize grain in Ampanihy



Source: FEWS NET

Figure 6. Integrated price projection of dried cassava in Ampanihy



Source: FEWS NET

seeds in February-March will drive prices up further. Prices will reach their lowest point of the outlook period in April once the sowing period has passed and demand for maize seed decreases. Prices will then slightly increase until June with anticipated below-normal production. During the cassava harvest, maize demand and prices will reduce until November 2021 with the first rainfall for the next cropping season (**Figure 6**).

- **Humanitarian Assistance:** During the outlook period, all large-scale humanitarian assistance will have ceased. However, some activities like resilience, social protection, agriculture, school feeding, and nutrition cover the majority of the district.
- **Wild foods:** Consumption of wild food will intensify from March to May and slightly decrease from June to September. The availability of typical wild food (yellow cactus fruit and Malagasy prune) will likely be below normal because it was consumed earlier following the extension of the lean season at the beginning of 2020. More poor and very poor households will consume atypical wild food like wild nuts, cactus leaves, tamarind, red cactus fruit, and wild tubers. Wild food prices will also increase.
- **Livestock herds and prices:** Livestock sales will likely continue to seasonally increase until May and prices will remain low. With the expected normal rainfall until May, body conditions will improve. From June to September, livestock from Taolagnaro, Betroka, and Betioky will be sold in the market at higher prices than in February but still below the average price.
- **Pastures and water availability:** Pastures are expected to continue improving until June with the expected normal rainfall in March-May. Water availability will also likely improve, especially with the TRANSMAD project in the coastal and central part of Ampanihy. Water prices will likely be set at MGA 500 at most for a 20 liter can. From July to September, pasture and water availability will slightly decrease.

Most Likely Food Security Outcomes

The indicators from the SMART survey in November 2020 indicated that in Ampanihy, 77 percent had a poor food consumption score (FCS), 42 percent showed crisis or higher on the household hunger scale (HHS), 53 percent had a high Reduced Coping Strategies Index (rCSI), and 11 percent practiced emergency coping strategies. These indicators point to Crisis (IPC Phase 3) or worse outcomes. FCS pointed to Emergency (IPC Phase 4) outcomes; however, this indicator is also reflective of dietary diversity and a poor FCS is not necessarily indicative of large food consumption gaps. As for nutrition and mortality indicators, GAM prevalence was 9.7 percent, crude mortality was 0.1 percent and under five mortality was zero percent.

According to key informants, in February, very poor households are still forced to reduce the frequency of their meals on a daily basis to rarely two meals per day. The rations are not very diversified and consist of cheaper foods such as cassava leaves or wild vegetables accompanied by dried cassava. Consumption of wild food partially meets energy needs. Other food groups such as milk, meat, fish, fruit, and oil are almost completely absent from the household diet. Sending children to eat with wealthier households is also widely practiced. Furthermore, all households have reduced their non-food expenditures, even better off households. However, for the poor and very poor, essential expenses like health and education for children will continue to be cut because of lack of food sources. Very poor households have sold their small ruminants and are forced to go into more debt, pawn their land, and engage in illegal activities such as making charcoal or informal mining.

Considering the level of food insecurity in November 2020, food access and livelihood deterioration between November and February, increased migration during the same period, historical trends of food security and nutrition outcomes over the last five years, the area is likely facing Crisis (IPC Phase 3) outcomes with many of the poorest households facing Emergency (IPC Phase 4) food security outcomes. In addition, there is no evidence indicating that the GAM and mortality rates will significantly deteriorate from November 2020 levels due of food insecurity.

Between February and May 2021, food consumption will likely deteriorate slightly because of reduced and delayed maize and pulse production. In addition, consumption of dried cassava will likely decrease because of elevated prices. Consumption of wild food, particularly yellow and red cactus fruit, will likely increase. In addition, very poor households will likely continue to sell their productive and non-productive assets as well as their last livestock (poultry). However, some households will have increased income earning opportunities with the expected average rainfall from March to June. They will be able to sell wild food or water, to engage in petty trade, or to sell charcoal and firewood. Furthermore, GAM prevalence is expected to remain between 10 and 15 percent considering the massive malnutrition treatment by UNICEF/ONN. Mortality linked to food insecurity will remain very low.

Between June and September, most households except the very poor will likely consume fresh tubers and sweet potatoes from their own production. The frequency of meals and diet diversity will slightly increase with the arrival of the main harvest and agricultural labor opportunities linked to the harvest period for very poor households. However, poor and very poor

households will consume immature cassava as well as cereal and pulse harvests including those which would be used for seeds for the 2020/21 cropping season. They are expected to continue to reduce non-essential expenditures, especially for education, health, and agricultural investment. GAM prevalence and mortality rates are expected to remain similar to February levels due to the massive nutrition program of UNICEF and ONN.

In conclusion, access to food and income is not expected to significantly change from February to September as result of the rainfall deficit during the start of the 2020/21 cropping season. Despite some crisis and emergency coping strategies adopted by poor households, food consumption is expected to remain at a similar level as February throughout the outlook period. Therefore, Crisis (IPC Phase 3) acute food security outcomes are expected to continue throughout the outlook period of February to September.

Other areas of concern

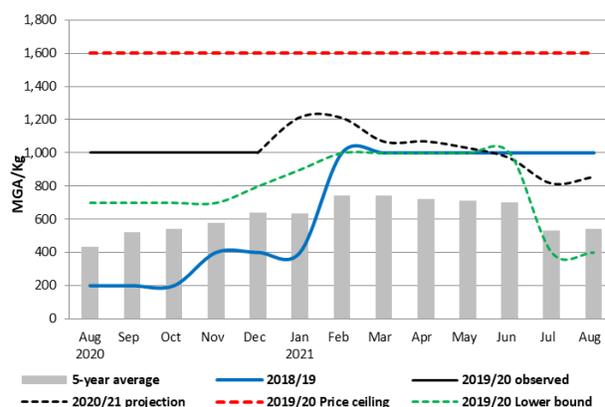
MG 24: Extreme south: cassava, maize, and livestock

Rainfall and cropping season: As was the case in MG23, a rainfall deficit occurred in the start of the cropping season (last quarter of 2020 and in the two first dekads of January 2021). As a result, cassava plants and cuttings were destroyed by the dryness and heat. In addition, most households sowed maize and pulses each time the rain started but without success as rainfall wasn't consistently sufficient until February. By then, three months after the typical start of planting, poor and very poor households had used up their inputs (seeds, cuttings, finances, and productive assets) and no longer had the means to plant. Green harvests of watermelon, muskmelon, pumpkin, maize, and early varieties of pulses, reduced to almost zero. The performance of the tuber campaign will be significantly impacted by the rainfall deficit and low availability of cuttings. Fresh cassava, which is typically harvested in May, will be reduced by 75 percent compared to average. Cassava typically harvested between June and August 2021 will be reduced by 30 percent because several households will decide to not plant cassava this year and wait for the 2021/22 cropping season. Sweet potato production will be reduced by 20 percent compared to the five-year average due to lack of cuttings.

Staple food prices: Food prices are currently very high in the area and inaccessible to very poor households who already have limited income sources. The overall impact of the 2020 drought on rice, cassava, and maize in the south drove price increases, especially for dried cassava and maize, for which demand is high during the planting period for seeds. In December 2020, prices of the two commodities were 150 percent above last year and 60-80 percent above the five-year average.

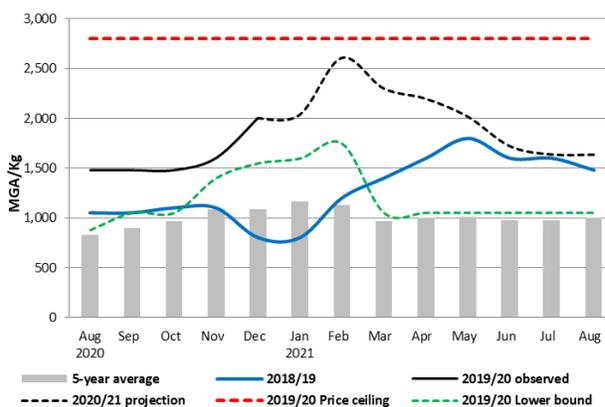
According to the FEWS NET projections, from February to May, dried cassava prices will remain above 1,000 MGA with a slight decrease until May when substitutes (maize from surplus area, and rice from MG22) become available. From June to September, with the first harvest of fresh cassava, the price of dried cassava will decrease significantly but it will be above the five-year average as result of lack of rainfall as well as cassava cuttings (**Figure 7**). As for maize, prices will slightly decrease in March until June at the end of harvest period but will remain very high. During the cassava harvest in June-September, maize demand and prices will reduce until November 2021 with the first rainfall in the next cropping season (**Figure 8**).

Figure 7. Dried cassava price projection, Ambovombe



Source: FEWS NET

Figure 8. Maize price projection, Ambovombe



Source: FEWS NET

Most Likely Food Security Outcomes

HEA Outcome Analysis results show that very poor households in Ambovombe district in MG24 livelihood zone will not be able to meet their annual survival needs during the 2020/21 consumption year. Very poor households will incur a survival deficit equivalent to four percent of their annual needs. In November 2020, the SMART survey conducted by the Nutrition Cluster in Ambovombe reported that 66 percent of the district had a poor FCS, 47 percent had crisis or higher on the HHS, 46 percent practiced high food based coping strategies, 28 percent of households adopted crisis coping strategies, and 43 percent adopted emergency coping strategies. Nutrition and mortality indicators pointed to Crisis (IPC Phase 3), GAM prevalence was 9.7 percent, under five mortality was 1.33 percent, and crude mortality was 1.06 percent. Between October to February, food prices remain high. However, during the rainy period in February, very poor households have more opportunities compared to November for agricultural work, water selling, and charcoal/firewood activities to avoid large food consumption gaps.

Between February to September, the situation in the MG24 is similar to the MG23 with similar contributing factors of food security (food and income access, harvest outlook, livestock, prices, labor opportunities, migration, and humanitarian assistance) Thus, the MG 24 will experience Crisis (IPC Phase 3) acute food security outcomes until September taking in account the current food gap, livelihood degradation, and the poor expected harvest forcing poor households to continue the practice of crisis/emergency coping strategies.

EVENTS THAT MIGHT CHANGE THE OUTLOOK

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

Areas	Events	Impact on food security
MG 23 and MG24	Change in rainfall forecast	If rainfall in February-April is below average rather than the forecasted average, the impact on staple food production as well as livestock body conditions and herd size will be much worse than the current state and the area will likely experience Emergency (IPC Phase 4) food security outcomes.
MG23 and MG24	Cyclone activity	If cyclones pass through the deep south between February and April, this will improve significantly production, water availability, and pasture conditions and the area could improve to area-level Stressed (IPC Phase 2) outcomes but with significant populations still facing Crisis (IPC Phase 3) outcomes.

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.](#)