Atypically severe lean season expected starting from October in southern Madagascar

KEY MESSAGES

- A near-normal main rice harvest wrapped up in July in most surplus producing areas. The cassava harvest is still ongoing in southern Madagascar. Average production of the crop, around 85,000 MT, was observed in southwestern areas, above-average production of 100,000 MT in the coastal extreme south, and below-average production of 75,000 MT in middle south communes due to the drought.

- In monitored urban markets, staple prices are above the five-year average and last year prices due to below-average stocks, driven by movement and transport restrictions. Compared to July 2020, most staple food prices remained stable or decreased because of the relative improvement of supply with the main harvest.

- Newly confirmed COVID-19 cases slowed in early August and increased by four percent per week in mid-August compared to 27 percent in July. Restrictions have been lifted in Antananarivo and in Toamasina allowing for increased engagement in income-earning activities from 4:00 AM to 5:00 PM. Intracity public transportation is still banned in Antananarivo as is the inter-regional movement of people, limiting migratory labor.

- Most humanitarian food assistance ended in July. Information is not yet available on assistance plans during the lean season, and as a result assistance has not been incorporated into FEWS NET’s projection analysis. Historical trends do, however, show the resumption of assistance in the south is likely to start in September. Emergency responses to COVID-19 are continuing in early August with large food distributions by the government in Antananarivo, Fianarantsoa, and Tulear targeting around 25 percent of population and covering 75 percent of their needs.

- Between October 2020 and January 2021, area-level food security outcomes in the cassava, maize, and livestock rearing livelihood zone (MG 24) and in the cassava and small ruminants (MG 23) livelihood zone will likely deteriorate to Crisis (IPC Phase 3). In the previously locked-down cities, Antananarivo, Toamasina, and Fianarantsoa, Stressed (IPC Phase 2) outcomes are likely as income-earning opportunities gradually improve. Elsewhere, Minimal (IPC Phase 1) acute food insecurity is expected, though some poor households who depend on tourism and producers who are affected by low farm-gate prices will likely be Stressed (IPC Phase 2).
CURRENT SITUATION

A near-normal main rice harvest ended in July in most surplus producing areas. Markets are now supplied by stocks of large collectors and wholesalers. At the producer level, a large part of the harvest is stored in anticipation of better prices during the upcoming lean season, beginning in October. Therefore, prices have increased since June, but increases have been tempered by imported rice and tubers despite the slight disruptions caused by COVID-19 transport restrictions. The growing need for maize in animal feed and beer has severely limited its availability and has contributed to significant price increases. In the context of COVID-19, the aggregate cereal import requirement for MY 2020/21 (April/May) is estimated to be above the five-year average and up to 30 percent higher than the FAO estimate of 720,000.

The cassava harvest is still ongoing in southern Madagascar. Average production is expected in southwestern areas (Figure 1), whereas above-average production is expected in the coastal extreme south and below-average production is expected in middle south communes (Figure 2) due to the drought. It is expected that poor households in southern areas started to consume and sell fresh immature cassava in May because of the long and severe lean season. Thus, the overall volume available at the markets is lower than usual, and prices in July were above the five-year average, especially in Amboasary and Ambovombe districts. Nonetheless, poor households currently have access to cassava either from their own remaining stocks or by purchasing on markets with income generated from selling labor to better-off households to harvest tubers. Other sources of income are less profitable with movement restrictions of people as well as the limitation of working hours set by local authorities since July.

As of August 25, the total number of confirmed cases of COVID-19 is 14,475, with 178 deaths. New cases sharply increased in July, but the rate of increase declined in August, particularly in the capital and in other major urban centers such as Toamasina, Moramanga, and Fianarantsoa. Since the beginning of August, the weekly growth in new confirmed COVID-19 cases has been around 7 percent, whereas it was around 27 percent at the beginning of July. This improvement in the situation led the government to lift certain restrictions in mid-August, including the return to normal economic activities between 4:00 AM and 5:00 PM in the main big cities like Antananarivo. The movement of people to and from the capital remain banned except to and from Antsiranana region. In some recently affected regions, such as in the south, where the disease is on the rise, local authorities have stepped up restrictions and are limiting working hours and implementing a curfew from 3:00 PM to 5:00 AM. Thus, economic impacts of COVID-19 at the national level remain significant despite a gradual recovery in urban areas. Income of households dependent on tourism, exportation, transport, mining, and petty trade are still very low.

Most of the humanitarian assistance in the south ended in July, except for the long-term programs of CRS, ADRA, and Land o’Lakes which reach about 300,000 people concentrated in the districts of Tsihombe, Ampanihy and Beloha. Treatment for malnutrition is also available throughout the big south. Most current food assistance is concentrated in large urban centers affected by COVID-19: 70,000 households in the capital, Toamasina, Fianarantsoa, and Moramanga benefitted from TOSIKA FAMENO, a transfer program of MGA 100,000 in early August; around 200,000 other households also benefitted from VATSY TSIJNO and a 50-kilo bag of rice, one liter of cooking oil and some pulses/milk/or vegetables, associated with a voucher of MGA 30,000.

UPDATED ASSUMPTIONS

The current situation has not affected most of the assumptions used to develop FEWS NET’s most likely scenario for the period of September 2020 to January 2021. However, the following assumptions have been updated
2020/2021 rainy season: USGS and NOAA continue to project current ENSO neutral conditions with La Niña being slightly favored as the most likely ENSO state between November and January and as such, the most likely forecast is an on-time and average November to March main rainy season. NMME model forecasts near normal rainfall in most of southern Madagascar, except around Amboasary district where a slightly below normal rainfall is forecasted between September and November 2020.

Staple prices: Following an expected decrease in local rice prices with the main harvest from May to July, FEWS NET price projection updates indicate that in Antananarivo, local rice prices will likely start increasing in August and will continue increasing until the end of the outlook period with the start of the lean season, remaining 7 to 10 percent above average. Meanwhile, imported rice prices in Tulear I will likely increase in August to return to April 2020 levels by the end of the outlook period, which means 30 percent above average, due to below normal food supply during the coming lean season. In Ambovombe, maize price projections have been revised upward. It will likely continue increasing until the end of the outlook period because of lower supply in the markets and will likely be the double of five-year average as stocks will deplete earlier than normal. Dried cassava prices will likely remain at MGA 1,000 per kilogram, about 65 percent above the five-year average, until the end of the outlook period as it will be sourced from further away areas like Betioky.

COVID-19 and related restrictions: Almost all restrictions have been lifted in Antananarivo and Toamasina. Periodic lockdowns in localized areas when/if there are spikes in cases are expected through January.

Humanitarian Assistance: In response to the extension of the lean season in the south, ADRA’s School Feeding Initiative (SFI) in Ampanihy will likely resume when schools start in September and October. ADRA’s Zina project which consists of supporting small farmers, will likely continue throughout the outlook period. FAO’s PROACT project supporting agricultural diversification will likely continue up to October 2020. ACF will likely programs to treat undernutrition and food insecurity in 6 districts. UNICEF as well will likely support nutrition programs by taking around 9,000 children into severe acute malnutrition PECMAS centers. In response to the effects of COVID-19 on food access, the government likely continue to transfer 100,000 MGA to each of 240,000 poorest households in Antananarivo, Fianarantsoa, and Toamasina in September.

PROJECTED OUTLOOK THROUGH JANUARY 2021

In the Extreme south: cassava, maize, and livestock rearing livelihood zone (MG 24), most poor households have more access to fresh tubers from own production. Despite this, most will experience Stressed (IPC Phase 2) outcomes through September, and some worst-affected households will likely be in Crisis (IPC Phase 3) because they ran out of their staple food stock. From October onwards, more households will likely deteriorate to Crisis (IPC Phase 3), as they deplete stocks from the below-normal production and prices of livestock will likely be low because of their poor body conditions and lower demand.

In the Southwest: cassava and small ruminants (MG 23), consumption has improved during the harvest even for the very poor households who increased their frequency and quantity of meals to near normal. Available information suggests meals are more diversified and include cooking oil, meat, wild foods, fish, and cassava and sweet potatoes from the ongoing tuber harvest, especially during the national holidays and during the peak of the cassava harvest in August. Poor households in the area will likely experiencing Stressed (IPC Phase 2) acute food insecurity situation in August and September 2020, though some worst-affected populations will likely be in Crisis (IPC phase 3), because they ran out of stocks and earn below-normal income from below normal crop sales. Between October 2020 and January 2021, food consumption of poor households will likely decrease in terms of frequency and amount, and reliance on wild food consumption will increase. Poor households will also likely send some members to eat at better-off households. Very poor households will likely start selling kitchen tools and animals. Very poor households in the zone will likely experience Crisis (IPC Phase 3) acute food insecurity again between October 2020 and January 2021. Although humanitarian food assistance is typically distributed between October and January and likely this year, the current absence of planned and funded assistance could result in some very poor households will experience Emergency (IPC Phase 4) food security outcomes.

In the previously locked-down cities because of COVID-19, Antananarivo, Fianarantsoa and Toamasina, staple food stocks have started to reduce because of the post-harvest period and because market functioning is deteriorating with the start of the lean season so food prices are increasing in October 2020 will remain above normal because of the COVID-19 context. Some pockets of food insecurity will likely remain, resulting in those cities likely being Stressed! (IPC Phase 2!) in August and September 2020, with the ongoing humanitarian assistance in Antananarivo and Fianarantsoa targeting around 25 percent of the population. With improved income earning opportunities expected from October, the previously locked-down cities are expected to remain in Stressed (IPC Phase 2) between October 2020 and January 2021.
Elsewhere, no major shocks greatly affected the area-level food security. Therefore, poor households throughout Madagascar will remain in None (IPC Phase 1) acute food insecurity from August 2020 through January 2021 outside the areas of concerns. Some pockets of households who depend on tourism and producers who are affected by low farm-gate prices will likely experience Stressed (IPC Phase 2) outcomes throughout the outlook period.

**MOST LIKELY FOOD SECURITY OUTCOMES AND AREAS RECEIVING SIGNIFICANT LEVELS OF HUMANITARIAN ASSISTANCE***

Each of these maps adheres to IPC v3.0 humanitarian assistance mapping protocols and flags where significant levels of humanitarian assistance are being/are expected to be provided. — indicates that at least 25 percent of households receive on average 25–50 percent of caloric needs from humanitarian food assistance (HFA). — indicates that at least 25 percent of households receive on average over 50 percent of caloric needs through HFA. This mapping protocol differs from the (!) protocol used in the maps at the top of the report. The use of (!) indicates areas that would likely be at least one phase worse in the absence of current or programmed humanitarian assistance.

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.