

*Favorable harvest prospects if rainfall distribution remains good through March*

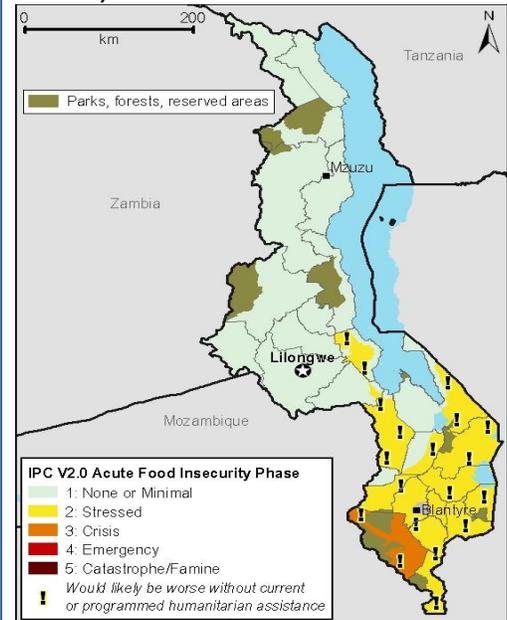
**KEY MESSAGES**

- Average national retail maize prices continued to be high in January and were 89 percent above the five-year average and 58 percent higher than last year's price levels. FEWS NET expects these price increases to continue through the lean season. When the harvest arrives in April, prices will decrease but are expected to remain above both the five-year average and the previous year's level throughout the remainder of the outlook period.
- With nearly all resources secured, humanitarian assistance is currently reaching 1.97 million food insecure people and is expected to continue as planned through March. Households in 15 of the 16 districts receiving assistance are expected to remain Stressed (IPC Phase 2) through March, while households in Chikhwawa district are expected to remain in Crisis (IPC Phase 3) due to high levels of mandatory sharing of rations and extremely limited migratory labor. Between April and June, all households will experience Minimal (IPC Phase 1) food insecurity outcomes as harvests become available for consumption.
- The Department of Climate Change and Meteorological Services (DoCCMS) reported that since the start of the season through early February, normal to above normal rainfall has been achieved across the country and this is likely to continue throughout February, increasing chances of flooding in flood-prone areas.

**CURRENT SITUATION**

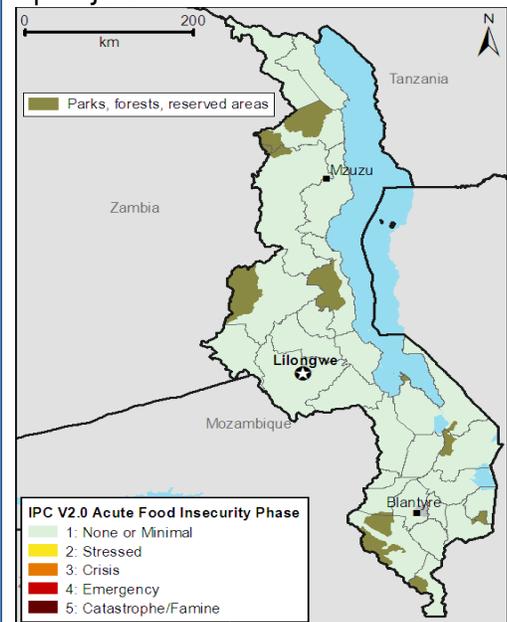
- According to the DoCCMS, between the start of season and early February, most areas in Malawi have achieved normal to above normal rainfall and this has contributed to crop and pasture development. An analysis of the normalized difference vegetation index (NDVI) products for Malawi shows that current vegetation levels compared to the long-term averages are mostly the same due to improved rainfall.
- The DoCCMS has reported that some early maturing maize crop varieties that were planted in early December have started maturing in the Lower Shire livelihood zone (LSH) and parts of Shire Highlands livelihood zone (SHI). In the rest of the country maize crop development is in varying stages and is reportedly doing well.
- According to the DoCCMS forecast, continued average to above average rainfall is expected for the month of February and this will

**Figure 1. Current food security outcomes, February-March 2013**



Source: FEWS NET

**Figure 2. Projected food security outcomes, April - June 2013.**



Source: FEWS NET

This map represents acute food insecurity outcomes relevant for emergency decision-making, and does not necessarily reflect chronic food insecurity.

likely result in continued flooding in flood-prone areas throughout the country.

- Under the coordination of the Department of Disaster Management Affairs (DoDMA), humanitarian assistance continues to be distributed to all 1.97 million food insecure people in southern Malawi in the form of food assistance or cash transfers.
- The World Food Program (WFP) December 2012 post distribution monitoring (PDM) report found that that 100 percent of beneficiaries were sharing their rations. This is expected since voluntary sharing is a normal practice in Malawian culture in difficult times. It is assumed that when beneficiary households deplete their rations, they are accessing food through market purchases using income earned from limited *ganyu* (labor) opportunities. Mandatory food sharing by village leaders was prevalent among 62 percent of beneficiaries in Chikhwawa district, suggesting that there are more non-beneficiary households in this district when compared to others that are unable to access food through markets due to limited household incomes.
- According to the Ministry of Agriculture and Food Security’s Agriculture Market Information System (AMIS), maize prices continued to increase nationwide in January. Average retail maize prices were 89 percent above the five-year average and 58 percent higher than same month previous year’s levels. In the southern region average maize prices in Ngabu market rose by 24 percent between December and January, while prices in Lunzu market increased 7 percent during this same period.
- The main drivers of high maize prices in northern Malawi are pressure from informal trade to the Horn of Africa, increased domestic demand from southern and central markets, and the continued depreciation of the local currency, which is contributing to increasing food inflation. In central Malawi markets the drivers are the depreciation of local currency, which is contributing to higher farm input prices, increased demand from southern Malawi markets, and dwindling stocks as we enter the peak of the lean period. In southern Malawi rising prices are in response to the depreciation of the local currency, which is contributing to increased transactional and transport costs, increased source market prices in the northern and southern region, along with trade flow reversals into Mozambique markets which have normally supplied Malawi markets in the past.
- Green harvests are expected in March and harvests in April-June. The harvest will improve household food availability through own food stocks, decreasing reliance on local market purchases for food.

**UPDATED ASSUMPTIONS**

The current situation has not changed the assumptions used to develop FEWS NET’s most likely scenario for the period of January to June 2013. A full discussion of the scenario is available in the [Malawi January Food Security Outlook](#) report.

**SEASONAL CALENDAR IN A TYPICAL YEAR**

