FEWS NET
FAMINE EARLY WARNING SYSTEMS NETWORK

SOUTHERN AFRICA Food Security Outlook — July 2021 to January 2022

Despite regional wide favorable 2021 harvest, conflict and drought likely to drive Crisis (IPC Phase 3)

KEY MESSAGES

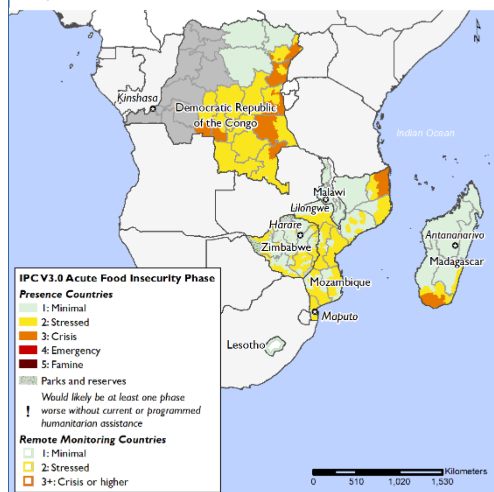
- Southern Madagascar is among FEWS NET's countries of highest concern due to consecutive droughts driving extreme losses in food and income access. Crisis (IPC Phase 3) outcomes are ongoing in the post-harvest period. Emergency (IPC Phase 4) outcomes are expected to emerge in Ambovombe and Ampanihy districts in October. Madagascar was affected by consecutive droughts leading to extremely low cereal and tuber production in the 2020/21 season. The forecast for the start of the 2021/22 rainy season is being closely monitored, given concerns about a possible late start of rainfall, which would have further negative effects on agricultural labor opportunities, wild food availability, production, and prices 2022.

- Conflict in eastern DRC and Cabo Delgado, Mozambique, continue to disrupt livelihood activities and disrupted the 2020/21 agricultural seasons. In DRC, clashes between the national army and rebel groups continue, and the number of displaced people continues to increase. This is leading to disruption of livelihoods and increased food insecurity. Crisis (IPC Phase 3) outcomes will therefore persist in Eastern DRC and Cabo Delgado through January 2022. In the rest of the region, Minimal (IPC Phase 1) and Stressed (IPC Phase 2) outcomes are expected to be widespread as households consume food from own production. Although, Crisis (IPC Phase 3) outcomes are expected to emerge in some deficit areas while Stressed (IPC Phase 2) outcomes become more widespread.

- Violent protests erupted in South Africa, resulting in more than 200 deaths, many injuries, massive looting, burning of trucks, buildings, destruction of property and infrastructure. The unrest resulted in the sudden loss of labor opportunities and employment for many vulnerable South Africans, let alone regional migrants. Among the affected areas was the Port of Durban, which could lead to some short-term impacts on regional supply chains as most regional markets depend on this port.

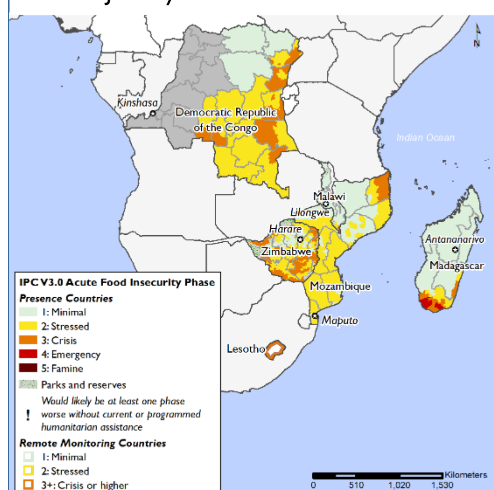
- Southern Africa is at the peak of the third wave of COVID-19, with a high number of cases and deaths being experienced across the region. As of July 1, 2.5 million COVID-19 cases and 72,000 associated deaths were reported across the region since the start of the pandemic. Most countries, including South Africa, Mozambique, Zimbabwe, DRC, and Malawi, have placed restriction measures to avoid further spread of the pandemic. The restrictions have slowed down economic activities and are negatively impacting trade, labor, and employment. In particular, labor migration and remittances have slowed down due to restriction measures in South Africa, the main regional labor market.

Projected food security outcomes, June to September 2020



Source: *FEWS NET*

Projected food security outcomes, October 2021 to January 2022



Source: *FEWS NET*

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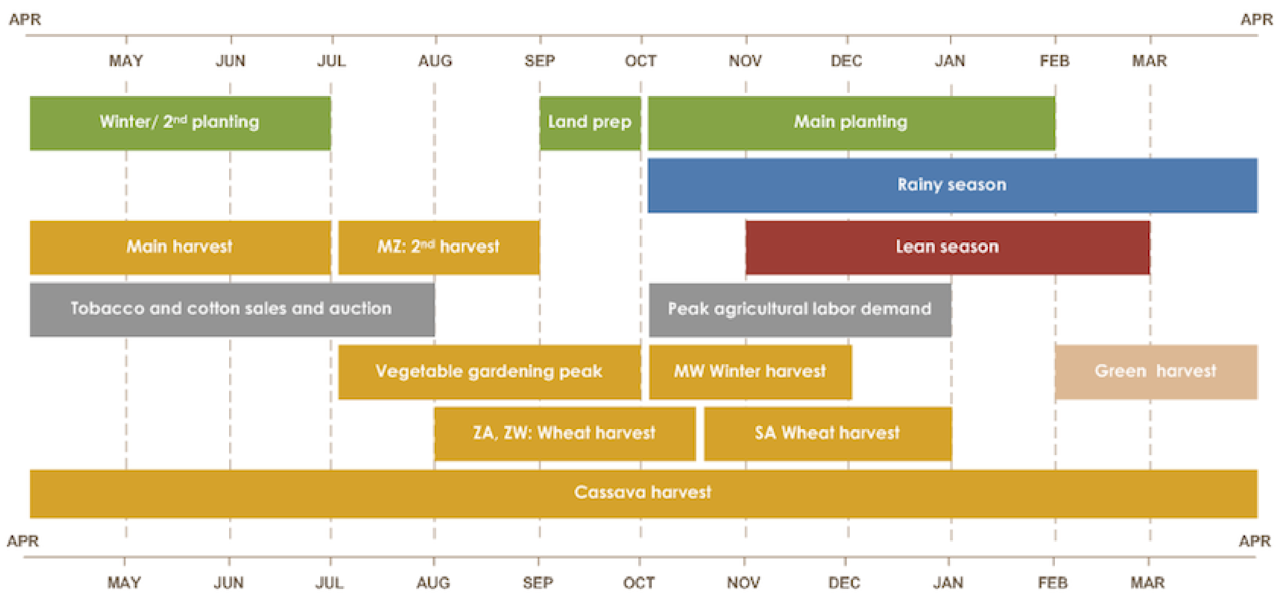
USAID FROM THE AMERICAN PEOPLE

- Despite civil unrest, conflict, and the pandemic, the 2021 harvest was favorable, with many countries recording surplus cereal production. Zimbabwe and Malawi are expecting a surplus, which is in part driving the above-average regional cereal supply. Owing to above-average cereal production, staple food prices are expected to be stable and declining in some areas. Nonetheless, Southern Madagascar was affected by a severe drought, with very poor production of cereal and tubers.

SEASONAL CALENDAR IN A TYPICAL YEAR



Source: *FEWS NET*

OUTLOOK BY COUNTRY

Democratic Republic of the Congo

- June marks the start of the main harvest for Season B production in the northeast and central-eastern areas of the DRC. Below-normal agricultural production is expected due to the combined effects of conflict and natural disasters marked by heavy flooding along Lake Tanganyika and its tributaries, the effects of restrictions linked to the COVID-19 pandemic, and a lesser extent, the eruption of the Nyiragongo volcano in North Kivu.
- With the state of siege decreed in Ituri and North Kivu and military deployment in eastern DRC, large-scale military operations against armed groups are expected. These military operations, which will exacerbate the population movement in the area, continuing to disrupt the living conditions of populations already affected by years of conflict. According to OCHA, the DRC is currently hosting 5.2 million displaced people and 2.2 million returnees, 64 percent of whom are in the two provinces mentioned above.
- The epidemiological situation of COVD-19 in the DRC continues to deteriorate with an increase in COVID-19 cases, particularly with the Beta and Delta variants. According to the Ministry of Public Health, the DRC is facing a third wave and is committed to strengthening restrictive measures for all.
- Due to the multiple crises ongoing, below-average harvests are likely, and despite the relative lull observed in the conflict areas of Tanganyika and Kasai) certain regions of the country will continue to be in Crisis (IPC Phase 3). In contrast, in the center-east and southeast, with areas having experienced an average agricultural year, Stressed (IPC Phase 2) outcomes are expected. The northern areas will likely be in Minimal (IPC Phase 1).

To learn more, see the February 2021 Democratic Republic of Congo Food Security Outlook.

Madagascar

- A significant scale-up of sustained assistance across southern Madagascar is required to prevent high levels of acute malnutrition and hunger-related mortality, particularly in Ambovombe and Ampanihy districts, where

Emergency (IPC Phase 4) outcomes are expected during the 2021/22 lean season, with some populations expected to be in Catastrophe (IPC Phase 5) in Ambovombe. Leading up to the 2021/22 lean season, area-level Crisis (IPC Phase 3) outcomes are expected in these districts with households in Emergency (IPC Phase 4). Other areas in southern Madagascar will likely face Crisis (IPC Phase 3) outcomes throughout the outlook period, with a significant number of poor households in Emergency (IPC Phase 4).

- Three districts in the southeast are also expected to face Crisis (IPC Phase 3) outcomes from October 2021 to January 2022 as a result of a severe rainfall deficit in January 2021 that negatively affected rice crop development at the transplanting phase. This led to lower household food stocks and lower income earning, forcing very poor households to sell more productive assets and livestock than usual.
- The persistence of Crisis (IPC Phase 3) and Emergency (IPC Phase 4) outcomes in southern Madagascar is driven by below-normal staple crop production, high food prices, and low labor opportunities resulting from successive years of drought. Rainfall forecasts call for below average precipitation between October and December 2021, the start of the 2021/22 rainfall season, lowering expectations for significant recovery.

To learn more, see the June 2021 Madagascar Food Security Outlook.

Malawi

- Most rural households are currently consuming food from their own production following the April to June harvests, supporting improved access to food. Minimal (IPC Phase 1) outcomes are expected to persist in most rural areas throughout the outlook period. However, in the Lower Shire livelihood zone districts of Nsanje and Chikwawa where prolonged dry spells resulted in production shortfalls for many households, the emergence of Stressed (IPC Phase 2) outcomes is expected around September/October with further deterioration to Crisis (IPC Phase 3) expected around November/December. In Malawi's main cities, improvement from Stressed (IPC Phase 2) to Minimal (IPC Phase 1) outcomes is expected around July 2021 alongside improvements in economic activity in the post-harvest period.
- Staple maize prices have continued to decline alongside the progression of harvesting. In May 2021, maize prices were 17 to 35 percent below prices at the same time last year and 7 to 20 percent below the five-year average across monitored markets. Below-average prices are projected to persist through July and then seasonally increase—trending near average levels—through the rest of the projection period. In May 2021, retail prices of maize averaged MWK 134 per kilogram at the national level and were lower than the government-set minimum farm-gate price of MWK 150 per kilogram in most markets, though above-average maize production is generally expected to compensate farmers for the lower selling prices. Production and income from tobacco and cotton—the main cash crops—are expected to be below normal.
- Since mid-June 2021, the number of new COVID-19 cases reported daily has been increasing. As of June 30, the seven-day moving average of new daily cases had increased to 129, up from under 15 from May 1 to June 14. While this is still significantly lower than during the peak of the second wave in early 2021 when the seven-day average of new daily cases approached 1,000, more contagious variants have been confirmed in Malawi and the government has closed borders to the entry of foreigners as of mid-June. Though not the most likely scenario, renewed

To learn more, see the June 2021 Malawi Food Security Outlook.

Mozambique

- Across Mozambique, most households are consuming the 2020/2021 agricultural season harvest driving None (IPC Phase 1) and Stressed (IPC Phase 2) outcomes as households recover from previous shocks such as cyclones, drought, and flooding. In Cabo Delgado, the ongoing conflict continues to displace households and disrupt livelihoods driving Crisis (IPC Phase 3) outcomes that are expected to persist through the scenario period. Of concern are inaccessible areas where households hide in the bush and are at risk of facing Emergency (IPC Phase 4) outcomes.
- The increasing number of IDPs in Cabo Delgado who have lost access to their typical livelihood activities and require emergency food assistance are burdening host families/communities and straining the current capacity of the humanitarian response. The 2021 Mozambique Humanitarian Response Plan (HRP) estimates around 950,000 people need food security in Cabo Delgado, Niassa, and Nampula, with 750,000 people targeted for humanitarian

food assistance (HFA). In May 2021, humanitarian partners provided HFA to 651,867 people in Cabo Delgado and Nampula provinces, approximately 87 percent of the initial HRP target.

- While agricultural production estimates for the 2020/2021 season are not yet available, the Ministry of Agriculture and Rural Development (MADER) expects a production increase of around 8 percent over last year. This is largely in line with the Water Requirement Satisfaction Index (WRSI), which estimates near-average to above-average production for maize grain. However, in eastern Nampula and eastern Cabo Delgado, agricultural production is expected to be well below average due to below-average rainfall and, particularly in Cabo Delgado, the impact of conflict. Below-average production is also expected in northern Maputo province and the lower Limpopo valley in Gaza due to dry spells at the beginning of the season and flooding in February.
- In most markets, the May 2021 maize grain prices decreased between 6 and 23 percent compared to April, driven by improved availability from the harvest. However, maize grain prices had mixed trends compared to respective prices last year and ranged between 6 and 94 percent above the five-year average. However, in Chimoio, the maize grain price in May was more than double last year's prices and the five-year average. Possible causes could include successive price rises over the past three years due to consecutive shocks (mostly floods associated with cyclones) that may have decreased local availability. As typical, maize meal and rice prices were relatively stable from April to May, with mixed trends compared to prices last year and the five-year average.

To learn more, see the June 2021 Mozambique Food Security Outlook.

Zimbabwe

- Minimal (IPC Phase 1) and Stressed (IPC Phase 2) outcomes are present across the country and are expected through September following the above-average 2021 harvest. In areas where Stressed (IPC Phase 2) outcomes are present, crop production was relatively low partly due to excessive 2020/21 rainfall and continued below-average household income. Beginning in October, Stressed (IPC Phase 2) and Crisis (IPC Phase 3) outcomes are expected in most typical deficit areas as own-produced food crops deplete and households rely on markets with below-average purchasing power. Throughout the outlook period, Stressed (IPC Phase 2) outcomes are expected in urban areas as poor households are likely to meet their basic food needs but face difficulty meeting their non-food needs.
- Volatile macroeconomic conditions are expected to continue through the outlook period. Despite the declining triple-digit official annual inflation rate, the cost of living continues to increase monthly, with household income increasingly constrained. Prices of some goods and services increased in June in USD and ZWL terms following the introduction of a policy aimed to ensure application of the official exchange rate for enterprises, sourcing foreign currency through the auction system. The ZWL currency further weakened against the USD on the parallel market by nearly 20 percent between May and June.
- The government has reinstated a national lockdown following a spike in COVID-19 cases; most economic activities are allowed under reduced staffing and working hours. Intercity passenger travel has been banned. Stricter localized lockdowns have been imposed in hotspots in Mashonaland West, Mashonaland Central, Midlands, and Masvingo Provinces and Bulawayo. Land borders remain closed to non-essential travel. The COVID-19 containment measures continue to impact income-earning activities, especially for informal sector activities in urban areas.

To learn more, see the June 2021 Zimbabwe Food Security Outlook.

Countries Monitored Remotely[i]

Lesotho

- Most of Lesotho is expected to face Minimal (IPC Phase 1) outcomes between June and August as the recent above-average harvest significantly improves household food and income access. However, as own-produced food stocks of very poor households deplete through August, Stressed (IPC Phase 2) outcomes are likely to return around September as households become increasingly market-dependent despite limited incomes. From October 2021 through January 2022, Crisis (IPC Phase 3) outcomes are expected for very poor households as demand for market purchases and staple food prices seasonally increase through the lean season.
- Since April, the COVID-19 incidence rate has been stable with very low to no new confirmed cases. Currently, there are minimal COVID-19-related restrictions in Lesotho. Many livelihood activities have improved since the lockdown

was lifted in March. However, the seven-day rolling average of confirmed COVID-19 cases has increased from one in early June to 16 by June 16, 2021. Additionally, the rapid increase of confirmed cases in South Africa since May 1 poses a risk of another outbreak in Lesotho given the volume of people travelling to and from South Africa. A return of lockdown restrictions will slow economic activity and impact household access to income.

- Between December 2020 and April 2021, maize meal prices in Maseru have been gradually increasing, likely driven by high demand during the lean season and a 19 percent increase in maize meal prices in South Africa around January. However, between June and September 2021, maize meal prices in Maseru are expected to stabilize as the local harvest increases and reduces household dependence on market purchases. Additionally, a good harvest in South Africa will maintain the market supply of grains at reasonable prices for local millers in Lesotho.
- With the ongoing peak of the winter season, sporadic snowfall has been reported across the country. While near freezing to freezing temperatures can negatively impact pasture and vegetable conditions, the residual moisture from the snow is likely to benefit the start of 2021/2022 agricultural activities in November, particularly for households in the mountains who typically rely on residual snow melt at the start of the agricultural season.

To learn more, see the June 2021 Lesotho Remote Monitoring Report.

EVENTS THAT MIGHT CHANGE THE OUTLOOK

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

Area	Event	Impact on food security outcomes
Southern Africa	Escalation of unrest in South Africa with disruption of supply chains	With South Africa being the main source or at least transit route of many food and basic commodities to most of the regional, disruption of supply chains may affect regional food and basic non-food supplies as well as other essentials including medicines and inputs. Countries likely affected are Botswana, Namibia, Lesotho, eSwatini, Zimbabwe, Mozambique, Malawi and Zambia. Interruption of Port Durban will likely affect major imports.

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.

[i] *With remote monitoring, an analyst typically works from a nearby regional office, relying on a network of partners for data. Compared to countries above, where FEWS NET has a local office, reporting on remote monitoring countries may offer less detail.*