Most parts of the region continue to experience significant staple deficits due to below average harvest.

**KEY MESSAGES**

- Typically at this time of year, food security outcomes significantly improve as it is the post-harvest period and most households increase consumption of own foods; however, this year households with a below average harvests and continue to experience Crisis (IPC Phase 3) and Stressed (IPC Phase 2). Conflict in the DRC, macroeconomic challenges in Zimbabwe, and the lasting impacts of cyclones in Mozambique, Zimbabwe, and Malawi are driving these outcomes. During the September to January period more households are expected to face Crisis (IPC Phase 3) with atypically high levels of acute food insecurity across the region with the highest concern in Zimbabwe, central and southern Mozambique, and parts of Lesotho.

- Preliminary production estimates indicate regional maize grain supply will be insufficient to cover regional food needs. National production across the region is generally below average with the largest deficits in Zimbabwe and Mozambique; however, Malawi is expected to have a slightly above average harvest. Most markets around the region are well supplied, besides in Zimbabwe where the macroeconomic challenges and limited harvest is limiting market supply. Limited domestic and regional supply are most likely going to require international imports to fulfill the regional consumption needs.

- Agriculture and non-agriculture labor opportunities are expected to be below average across parts of the region through at least October, when rainy season typically starts. This is the result of limited cash and food stocks in better-off households. This will limit poor household incomes to purchase food. Livestock conditions are also likely to be affected across the region as pasture conditions and water availability are below average in many areas.

- Staple food price trends from April to May were mixed across the region. In Madagascar and Mozambique, staple prices decreased although remained near or above average. On the contrary, in Lesotho and Malawi prices were slightly increased. In Lesotho, this trend is expected to continue due to increased reliance on markets for food by drought affected households. Staple food prices in Zimbabwe continue to increase due to limited supplies and high inflation levels.
OUTLOOK BY COUNTRY

Democratic Republic of the Congo

- Despite average harvests at the end of this growing season, June marks the harvest period throughout the eastern region of the Democratic Republic of Congo (DRC). The availability of basic commodities will improve with earlier than usual lean periods: August for the northeastern and central-eastern parts of the country and September for the southeast.

- Uncertainty in the last three months in the Masisi and Rutshuru territories in North Kivu, the Djugu territory in Ituri and the Uvira territory in South Kivu, as well as the persistence of the Ebola epidemic in Beni and Lubero, continue to disrupt agricultural activity, limiting people’s access to their livelihoods. This situation could compromise agropastoral activities in the eastern part of the DRC in the medium term.

- The low food availability associated with recurrent epidemics has had a significant impact on the nutritional situation in the DRC. According to the National Nutrition Program (PRONANUT), 57 health zones (11 percent) have been on nutritional alert in the first quarter of 2019, including 43 health zones (75.4 percent) in the Kasai, Kwango and Kwilu regions. Analysis of the three previous quarters shows sharp fluctuations and a nutritional situation that is far from under control, despite the response from health services.

To learn more, see the June 2019 Democratic Republic of Congo Food Security Outlook.

Malawi

- Minimal (IPC Phase 1) outcomes are present in most northern areas, while humanitarian food assistance is mitigating outcomes in central and southern areas with Minimal! (IPC Phase 1!) and Stressed! (IPC Phase 2!) outcomes present, respectively. Incomes from agricultural labor, livestock sales, and self-employment are below average as a result of a bad 2017/18 production season with most households relying on markets for food.

- According to the Ministry of Agriculture’s second round crop estimates, national food production is anticipated to be average to above average. Crop production specifically for cereals and tubers is most likely to be above average. The Ministry of Agriculture currently estimates that the national production of maize will be about 10 percent above the five-year average. However, localized production shortfalls exist in areas hit by heavy rains and flooding, especially in southern Malawi.

- Prices for maize continue to be higher than normal, despite the start of the harvest and anticipated average to above average national crop production. This is the result of localized production shortfalls in southern Malawi which is atypically increasing market demand. Current and projected prices are estimated to be about 20 percent above the five-year average and much higher than last year’s prices. This will likely lead to reduced food access for low income households.
• Overall food security outcomes in central and most of northern Malawi are favorable with Minimal (IPC Phase 1) outcomes present and anticipated to prevail through January. Stressed (IPC Phase 2) outcomes are most likely for some southern districts in the postharvest period due to below average harvest and income with atypically high market prices. Crisis (IPC Phase 3) outcomes are anticipated to emerge in some southern districts starting in October 2019 and persist through January.

To learn more, see the June 2019 Malawi Food Security Outlook.

Mozambique

• Mozambique is experiencing its worst food insecurity emergency since the 2015/16 drought with an atypically high number of households in need of emergency assistance. This is the result of multiple shocks including tropical cyclones Desmond, Idai, and Kenneth with associated torrential rainfall and severe flooding and drought in southern semiarid areas. These shocks have significantly impacted crop production across the country and livelihoods, specifically in Cyclone affected areas.

• Most of the country is facing Stressed (IPC Phase 2) and Crisis (IPC Phase 3) outcomes. In southern semiarid areas this is the second consecutive poor season and households have little to no food stocks, which is atypical for this time of year. Tropical Cyclone affected households lost their crops for the 2019/20 consumption year and are continuing to rebuild their livelihoods. The rest of the country is experiencing Minimal (IPC Phase 1) outcomes due to a normal harvest.

• Due to the significantly below-average harvest, the lean season is expected to begin atypically early. Household food stocks are likely to be exhausted by September, even though efforts are ongoing to maximize the second season, which typically contributes a small portion to the annual households’ food stocks, particularly for cereals. In October/November, agricultural labor opportunities are expected to seasonally increase with the start of the rainy season but is expected to remain below average.

• In areas most affected by this year’s shocks, namely in Gaza, Inhambane, Sofala, Manica and parts of Zambézia provinces, poor households are expected to continue engaging and increasing their reliance on livelihood coping strategies to meet their minimum food needs. The poor and very poor households are expected to continue facing Crisis (IPC Phase 3) food security outcomes in January 2020, with humanitarian food assistance needs most likely increasing until the harvest in April 2020.

To learn more, see the complete June 2019 Mozambique Food Security Outlook.

Madagascar

• The 2018/19 rainy season concluded with cumulative above normal rainfall in northern and southwestern parts of Madagascar, below normal along the central-west and the central-east coasts and normal to slightly below normal throughout the rest of the country.

• Overall national rice production will likely be 3.3 million MT, maize production will likely be around 215,000 MT, and cassava production around 2.6 million MT. Each of these similar to last year. Production of sorghum and millet is also increasing, particularly in Androy and Itasy regions.

• Most food security programs and projects like ASOTRY and FARANO of FFP, CRS’s HAVELO, ADRA’s ZINA and HOPE, and WFP’s emergency projects are at their end-line evaluations and closure. Other projects are expected starting in October 2019, but with lower coverage.

• In June 2019, poor and very poor households in the southwest and far south of Madagascar are experiencing Stressed (IPC Phase 2) except in Ampanihy district, Beloha district and the four most vulnerable communes of Fort-Dauphin which are in Crisis (IPC Phase 3).

To learn more, see the June 2019 Madagascar Food Security Outlook.

Zimbabwe

• The deteriorating macroeconomy and significantly below average 2018/19 crop production are expected to drive widespread Crisis (IPC Phase 3) food security outcomes through at least January 2020. In high production northern areas and some central parts of the country Stressed (IPC Phase 2) outcomes are expected through August, after which Crisis
(IPC Phase 3) outcomes are expected. Some worst-affected households are likely to be in Emergency (IPC Phase 4) outcomes in districts of highest concern: Kariba, Binga, Hwange, Gokwe North, Mbiere, Mudzi, and Chipinge districts from October through February, the peak of the lean season.

- The long-standing economic challenges are expected to continue driving poor and highly volatile macroeconomic conditions. Some basic commodities like bread, sugar and cooking oil are likely to continue in short supply. Fuel shortages and increasing fuel prices are also contributing to the economic hardships faced by both rural and urban populations as household incomes and purchasing power rapidly erode.

- The Ministry of Agriculture currently estimates maize production for the 2018/19 season to be about 776,600 MT, 45 percent of last season and 59 percent of the five-year average. Early international forecast indicate, near average rainfall is likely for the start of the 2019/20 season. Despite this forecast, agriculture labor opportunities are likely to be below average. In addition, access to agriculture inputs is anticipated to be limited.

To learn more, see the June 2019 Zimbabwe Food Security Outlook.

Countries Monitored Remotely

Lesotho

- Most of Lesotho is experiencing Stressed (IPC Phase 2) food security outcomes, supported by limited 2019 harvests. However, this status is expected to be short lived and Crisis (IPC Phase 3) outcomes will likely re-emerge by September.

- Following a poor 2018/19 rainfall season, the below-average 2019 harvest is one of the main drivers of food insecurity in Lesotho this year. Unofficial estimates suggest that maize production is about 20 to 40 percent below reference year levels and sorghum production, an important cereal crop, is less than last year and significantly below the five-year average.

- Market staple food prices in Maseru are still favorable, however reports indicate a gradual increase. Price projections by FEWS NET (Figure 1) show that maize meal prices in Maseru will likely increase to above-average levels during the outlook period. They are expected to fluctuate between 4–12 percent above 5-year average between July 2019 and February 2020, driven by price increases in South African source markets. Market supplies should remain stable across Lesotho.

To learn more, read the June 2019 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.

<table>
<thead>
<tr>
<th>Area</th>
<th>Event</th>
<th>Impact on food security outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Southern Africa</td>
<td>Below average start to the 2019/20 rainy season</td>
<td>Another season of below average trains will negatively affect crop and livestock production including decreasing livelihood options like casual labor, livestock sales and engagement in on farm agriculture activities. This situation will likely worsen the food insecurity outcomes for most households currently experiencing Crisis (IPC Phase 3) especially during the period October to January</td>
</tr>
<tr>
<td>Malawi, Madagascar,</td>
<td>Increase in Cyclone Activities between December and January</td>
<td>With anticipated average rains, increase in cyclone activities will likely affect farming activities and will result in loss of production to affected areas.</td>
</tr>
<tr>
<td>Zimbabwe and Mozambique</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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.
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.

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.

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.