

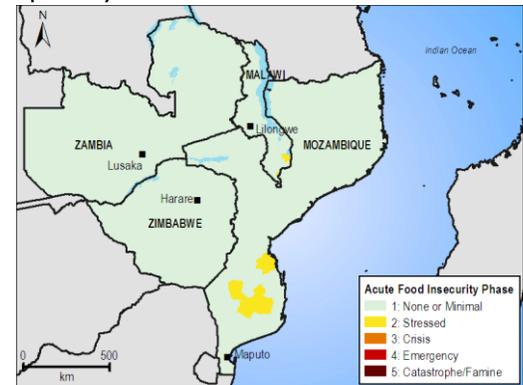
SOUTHERN AFRICA Food Security Outlook

April through September 2012

Key Messages

- Food security conditions over most parts of Southern Africa remain satisfactory and conditions are expected to remain so throughout the Outlook period. The projected average to above-average maize harvests are assessed to be sufficient to meet the region's requirements for the next six months and beyond.
- Current reports indicate that household food access has improved and increased on-farm food supplies have eased the pressure on local markets. Prices have stabilized, and in some cases, started dropping.
- The total regional cereal availability is expected to decline from the levels reached last season. This is mainly due to slight production declines in some countries that were impacted by floods and/or dry spells.

Figure 1. Current food security outcomes, April/May 2012

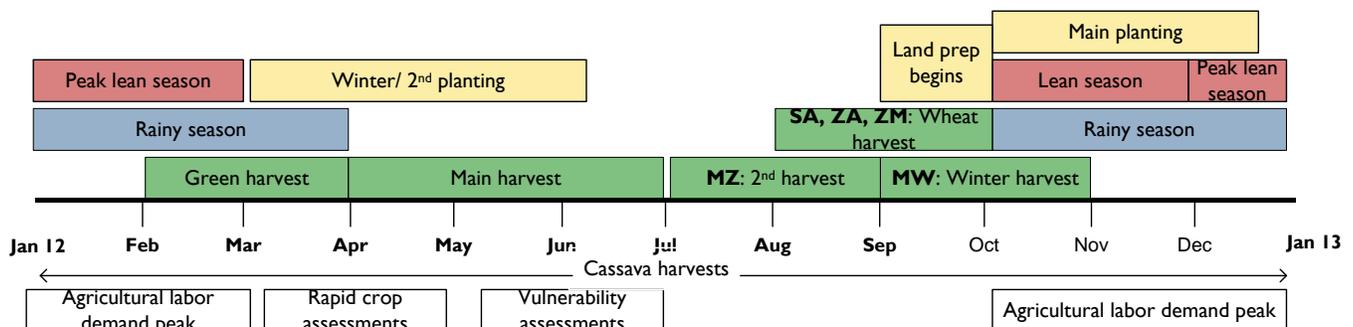


Source: FEWS NET

For more information on the IPC Acute Food Insecurity Scale, see www.fews.net/foodinsecurityscale.

- In Malawi and Zambia, the above average maize harvests will be complemented by large carryover stocks on account of the bumper harvests from the past two seasons. South Africa on the other hand is expecting a 74 percent reduction on its maize carryover (from 2.34 million to 614,000 MT), but with a 7 percent increase in the current harvest (over last season) the country will still have a sizable exportable surplus in 2012/13.
- Despite generally satisfactory national food availability, localized areas of concern exist where shocks to livelihoods have compromised food availability and access. These include parts of southern Malawi, the semi-arid districts of southern and central Mozambique, parts of the southern provinces of Zimbabwe, and most parts of Lesotho. Food will have to be moved from surplus to deficit areas, imported commercially (formally or informally), or distributed as food aid to cover the needs of populations facing food shortages.

Seasonal calendar and critical events timeline



Source: FEWS NE

This report provides an update to the March 2012 Outlook report for Southern Africa, which covered the March to June 2012 period.

The next Outlook report will be released in May 2012 and will cover the May to September 2012 period.

FEWS NET Southern Africa
Tel: +27 12 362 6494
Fax: +27 12 362 5651
southernafrica@fews.net

FEWS NET Washington
1717 H St NW
Washington DC 20006
info@fews.net

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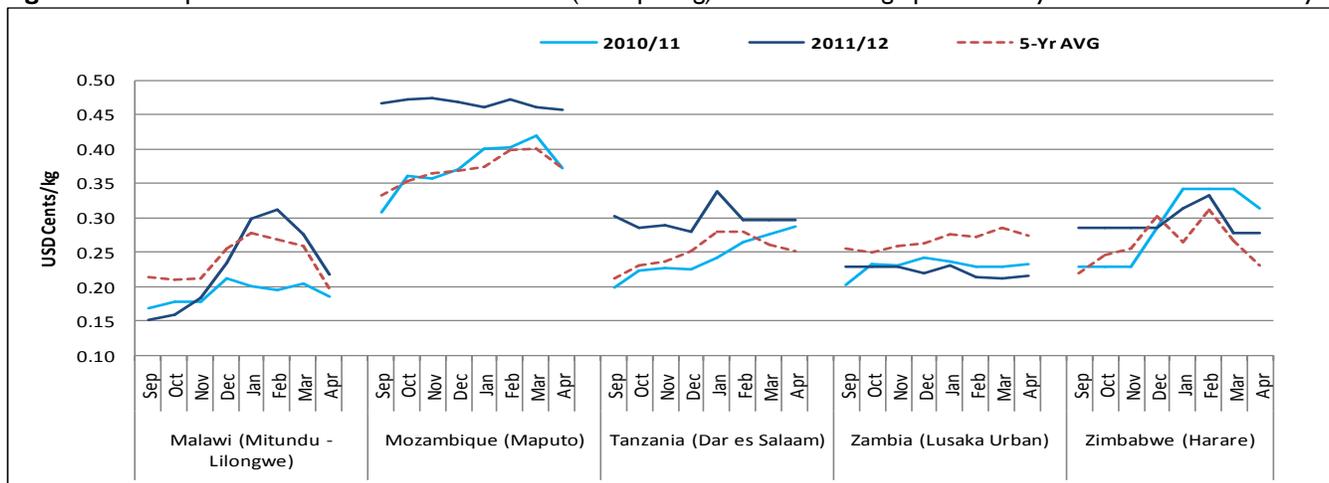
Current conditions

Monitoring and assessment reports indicate a general improvement in food security across most of the Southern Africa Development Community (SADC) region coinciding with the end of the lean season (March/April). Food supplies have improved as seasonal crops and early maize harvests become increasingly available on farms and in local markets. Food security has been particularly enhanced in areas where crop production benefited from favorable rainfall performance, and where minimal exposure to production shocks was experienced. Increased on-farm food availability has eased pressure on local market supplies, in turn easing the pressure on prices.

By April, staple food prices in most markets had stabilized and had started decreasing. Most markets were reported to be adequately stocked with this season’s green and early harvests as well as last season’s stocks which traders have been off-loading in preparation for this season’s new crop. Staple food prices on most markets are expected to continue to decline until the end of the harvest period (July/August) when prices should stabilize before rising again as the lean season approaches. In general, maize prices this April are above the April 2011 and five-year average levels; a trend that has been prevailing for much of the past year due mainly to rising input and transportation costs. Exceptions have been observed in Zambia where, due to ample maize surpluses, 2011/12 prices were below both last year and the past five-year average, and in Zimbabwe where prices were above the five-year average, but below those pertaining in 2010/11 marketing year. In Mozambique, while prices are following the normal trend, they remain significantly above the five-year average, which is also much higher when compared to price levels in key markets in neighboring countries (Figure 2).

While, in general, the current food security situation is progressively improving, there remain localized areas of Stressed (IPC Phase 2) food insecurity conditions in some parts of the region. This is exemplified by current (April/May) conditions in the four FEWS NET presence countries in the region where more detailed information exists to enable food insecurity severity mapping (Figure 1). Reasons for these conditions include: effects of the January floods and/or the January/February prolonged dry spells, which have delayed the availability of early foods, forcing households to still rely on local markets and/or food distributions from on-going assistance programs. Some affected areas, such as those in southern Malawi (the Lower Shire Livelihood Zone), the semi-arid districts in south and central Mozambique, parts of southern Zimbabwe, and the northern and north eastern pastoral areas of Tanzania, have faced consecutive years of poor harvests due to erratic rainfall, drought, and/or flooding.

Figure 2. Retail prices of maize in selected markets (USD per kg) based on average prices in key markets in each country



Source: FEWS NET Malawi, Mozambique, Tanzania, Zambia, and Zimbabwe

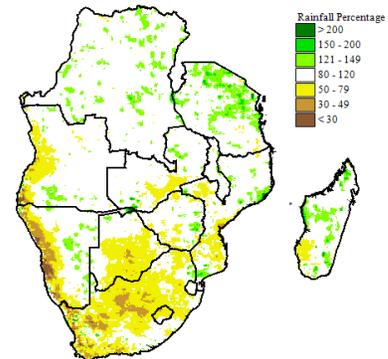
Some vulnerable households in these areas have been receiving food assistance which has helped to mitigate food insecurity. Resources for this assistance vary from country to country. In Zimbabwe which has a much larger case load of beneficiaries, reports from the World Food Programme (WFP) indicate a partial pipeline break (shortfall between 10 and 50 percent of requirement) in the upcoming six months. Similarly, WFP food assistance programs targeted at vulnerable population groups in Mozambique are also projected to face a partial pipeline break in the period April to September 2012.

Urgent action is required in both countries to secure additional donor resources, especially as both countries will experience an increase in the case load of beneficiaries following localized poor harvests in parts of these countries. In Malawi, the government and partners are providing maize to assist targeted populations; the WFP pipeline is indicated as adequate, and distributions are scheduled to end in July 2012.

Seasonal progress and harvest expectations

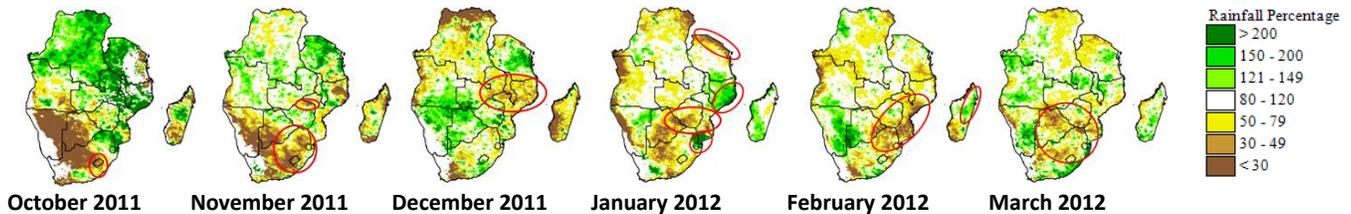
The 2011/2012 rainfall season generally performed poorly in the southern half of the region, which received below average rainfall (yellow and brown colors, Figure 3), while the northern parts of the region generally received normal (white) to above normal (green colors, Figure 3). Figure 4 gives a month by month breakdown of the rainfall performance from October 2011 to March 2012. During the first half of the season, several areas experienced below normal rainfall performance, including parts of South Africa and Lesotho, as well as much of Malawi, northern and central Mozambique, most of Madagascar, southern and eastern Zambia, and northern Zimbabwe. This low rainfall was mainly associated with an erratic start of the rainfall season in many areas, and a delayed onset of the rains. The erratic onset negatively affected crop performance in some areas, particularly where crops were not able to reach full maturity under optimal conditions. In contrast, some of the northern and central parts of the region received above normal rains in the first half of the season.

Figure 3. Rainfall Performance as a percentage of average for the period 01 Sep 2011 to 30 Apr 2012.



Source: USGS/FEWS NET

Figure 4. 2011/12 monthly rainfall (as a percentage of average): October 2011 to March 2012 (significant rainfall and dry spell events highlighted in red).



Source: USGS/FEWS NET

A prolonged dry spell occurred in the second half of the season in the southern parts of the region. The dryness was most severe in January and February in most areas, but in some areas extended into March. Affected areas included Angola, eastern Botswana, southern Malawi, central and southern Mozambique, central South Africa, the unimodal areas of northern Tanzania, southern Zambia, and southern Zimbabwe. This dryness negatively impacted crop performance in many of the affected countries, and led to permanent wilting and crop failure in some areas. Cyclones and heavy rains in January and February led to flooding and loss of lives, infrastructure and crops in several countries including Mozambique, Malawi and Madagascar.

Harvest Prospects

While most SADC Member States are still carrying out crop production estimation surveys, early qualitative estimates point to a reduced cereal production compared with last year’s levels, although a few countries (such as South Africa) have recorded an increase in production, primarily due to increased planted area. This preliminary analysis is supported by the Water Requirements Satisfaction Index (WRSI) analysis which suggests that several areas in the region were negatively affected by poor rainfall distribution leading to below average crop performance (brown colors, Figure 5). Although official crop estimates have only been released in South Africa, Malawi, Zambia and Zimbabwe, field reports (observations and qualitative assessments) support this analysis.

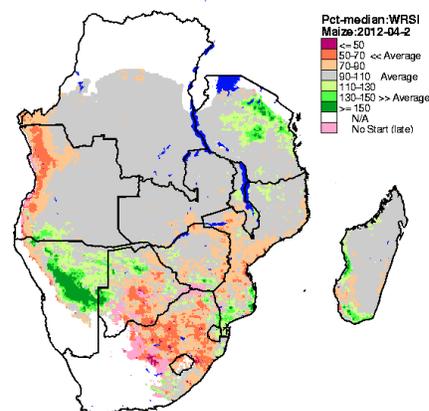
Despite the mediocre rainfall performance, South Africa, Malawi, Mozambique, and Zambia are still expecting harvests that are close to, or above, their respective five-year averages. This level of production, which, with the exception of South Africa, is slightly below last year's levels, has been achieved despite the adverse impacts of excessive rains, floods and mid-season dry spells.

As usual, the largest cereal harvest is expected in South Africa (Table 1), which on average contributes 40 to 45 percent of the region's total production. Following the 14 percent increase in the area planted (in response to high price levels of maize); total production has increased by seven percent even after the impacts of the mid-season dry spell. The latest production forecast (as of April 24th) estimates a South African maize crop of 11.69 million MT, or two percent above the five-year average of 11.48 million MT.

The bulk of the rest of the region's maize comes from Malawi, Tanzania, Mozambique, and Zambia – countries which in good years produce more than sufficient quantities to meet their own domestic requirements and leave sizable exportable surpluses. In the past five years these four countries have produced over 90 percent of the harvest of all countries, excluding South Africa. In all four countries more favorable prospects were diminished by localized weather shocks as described above. In April, Malawi issued a forecast based on the second round estimates suggesting a total maize crop of 3.619 million MT. This figure is seven percent below last year's bumper harvest of 3.895 million MT because of the effects of drought and flooding experienced in the southern districts of the country. At the end of April, Zambia also issued its crop estimates which indicated that maize production was six percent below last year, but still 36 percent above the five-year average. Qualitative estimates from Tanzania and Mozambique suggest that production levels are respectively, slightly less or the same as those achieved last year.

In Zimbabwe where official estimates were released in April, national cereal harvests are estimated to have dropped significantly (33 percent since last year and 14 percent compared to the five-year average) on account of reduced crop yields (and in some instances crop failure) due to the mid-season dry spell in the southern parts of the country. Elsewhere in the region, current projections suggest a variation in expected production depending on weather severity and the impacts on crops. Angola, Lesotho, and Swaziland are expecting reduced harvests, while the remaining countries are expecting harvests that are slightly above (or similar) to last year's levels.

Figure 5. Water Requirement Satisfaction Index (WRSI) as a percentage of Normal, April 2012.



Source: USGS/FEWS NET

Table 1. SADC regional preliminary production forecasts: 2010/11 compared to 2009/10 ('000 MT)

	Maize				All Cereals			
	5-year AVG	2010/11	2011/12	% Change	5-year AVG	2010/11	2011/12	% Change
South Africa	11,483	10,924	11,685	7	13,592	13,016	13,456	3
Other SADC*	13,512	16,158	14,534	-10	17,293	20,512	18,768	-9
TOTAL	24,995	27,082	26,219	-3	30,885	33,527	32,224	-4
Malawi	3,461	3,895	3,619	-7	3,674	4,121	3,833	-7
Zambia	2,103	3,020	2,853	-6	2,366	3,363	3,197	-5
Zimbabwe	1,068	1,452	968	-33	1,303	1,650	1,120	-32

Source: SADC National Early Warning Units and Central Statistics Office

* Excludes South Africa, DRC, and Madagascar.

Most likely regional food security scenario

Since households depend heavily on the agricultural cycle and related activities, the evolution of food security conditions in the Outlook period will largely be determined by the size of the main season harvests and the second season crop (where

applicable). Consequently, because of the current harvest expectations, the most likely food security scenario for the SADC region between April and September should see a continuation of generally food secure conditions in most areas, except where shocks such as floods and dry spells have compromised food availability, access, and/or utilization. These areas include parts of southern Malawi and southern and central Mozambique (Figure 6) where FEWS NET has sufficient data to classify food insecurity severity using the IPC Phase classification scale.

Overall, the outlook of generally stable food security conditions in the region is projected based on the forecasts of average to above-average cereal harvests which should be largely sufficient to meet the region's consumption requirements for the next six months and beyond. Preliminary regional maize supply/demand projections for the 2012/13 marketing year suggest that maize availability will meet the region's needs and will leave a surplus that could be exported outside of the region (Table 2). Although maize imports will not be critical to meet requirements in the next six months of this outlook period, traditional importers of South African maize (primarily the BLNS countries – Botswana, Lesotho, Namibia and Swaziland) will benefit from the declining maize price levels on the South African Futures Exchange (SAFEX). This will enhance access for many of the poorer farming and non-farming households who normally depend on markets to access food shortly after the May/June harvest period ends.

At the sub-national level, most rural households will have access to their own food production until the onset of the next lean season (October/November). Even in the marginal grain production areas, the April/May harvests are expected to meet consumption requirements of most of the farming households over the next three to six months. Once own production is exhausted these households (and those that are market-dependant) are expected to be able to access adequate food from local markets, as prices are expected to continue to decline, remaining stable until the beginning of the lean season.

Market supplies are expected to remain good across the region due to expected good harvests and modest carryover stocks from last year. However, staple food prices are expected to increase according to seasonal trends. Staple food prices will likely remain above the five-year average due to increased transportation costs and high input costs being incurred by most farmers in the region. SAFEX prices in South Africa are expected to continue tracking international price trends and to remain above their recent five-year averages on account of increased export programs to international markets.

In general, the regional outlook is food secure, but in some areas of concern (as mapped in Figures 6 and 7) FEWS NET has collected data and identified acute food insecurity for vulnerable households in particular areas that are facing food shortages as a result of poor harvests due to weather related shocks, macro-economic/ price shocks, and/or marginal productivity of the land. These areas include: the flood-affected and mid-season drought-affected areas of central and southern Mozambique; the southern districts of Zimbabwe (Masvingo, Matabeleland North, Matabeleland South, and Manicaland provinces); the extreme southern and western parts of Zambia (Gwembe and Luangwa Valleys); and the

Table 2. SADC preliminary Maize Balance Sheets: 2012/13 ('000 MT)

MAIZE	Current 2012/13 Year: Projections						
	SADC*	South	Total	FEWS SOUTH COUNTRIES**			
	Other	Africa	SADC	MAL	ZAM	ZIM	MOZ
Opening stocks	1,790	614	2,404	60	771	511	219
Gross Production	14,534	11,685	26,219	3,619	2,853	968	2,000
Availability	16,324	12,299	28,623	3,679	3,624	1,479	2,219
Gross requirements	15,855	10,682	26,537	2,982	2,088	1,754	2,218
Desired stock req's	842	1,119	1,961	130	500	0	0
Demand	16,698	11,801	28,499	3,112	2,588	1,754	2,218
Deficit/Surplus	-374	498	124	567	1,035	-275	1
Deficit/Surplus***	468	1,617	2,085	697	1,535	-275	1

Source: SADC National Early Warning Units and Central Statistics Office

* Excludes South Africa, DRC, and Madagascar.

** Official Estimates except in Mozambique where maize estimates are cited from FAO/GIEWS

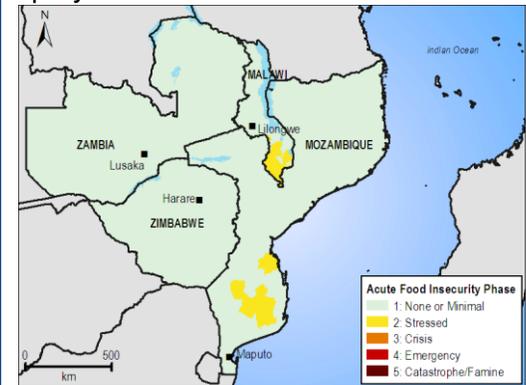
southern livelihoods zones of Malawi (Lower Shire livelihood zone, Middle Shire livelihood zone and the Lake Chirwa-Phalombe Plain livelihood zone.

Households facing acute food insecurity in areas of concern in Zambia and Zimbabwe will remain below 20 percent of the total population, and therefore the areas will remain classified as minimal to no acute food insecurity (IPC Phase 1) throughout the Outlook period. However, in parts of southern Malawi and the semi-arid to arid areas of southern and central Mozambique, some households (especially the very poor and poor) are currently facing Stressed (IPC Phase 2) food insecurity conditions and are estimated to remain so through the Outlook period unless external assistance is provided and/or scaled up.

Conditions are projected to be more severe in southern Malawi. Additional factors including macro economic instability which has led to a 33 percent devaluation of the local currency, along with significant increases in fuel and other commodity prices will exacerbate prevailing access problems and likely cause poor households to fall into the Crisis Phase (IPC Phase 3) during the July to September period if a lack of assistance persists. Households will then have to employ not only the coping strategies that are normal for this time, but also crisis coping strategies that could further erode their livelihoods.

Results from the annual vulnerability and food security assessments that will be conducted in May/June will provide more detailed information that will assist decision makers in determining the level of support required by affected households and the timeframe in which assistance will be required.

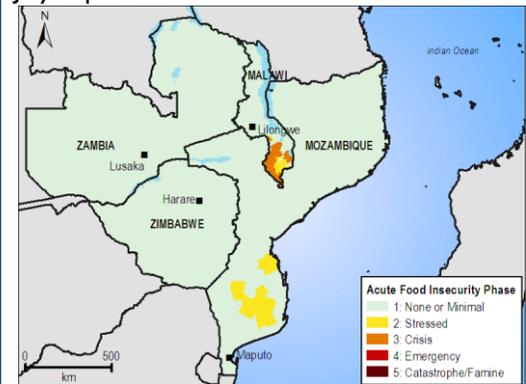
Figure 6. Most likely food security outcomes, April-June 2012



Source: FEWS NET

For more information on the IPC Acute Food Insecurity Reference Table, please see: www.fews.net/FoodInsecurityScale

Figure 7. Most likely food security outcomes, July-September 2012



Source: FEWS NET

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