

2018/19 Seasonal Performance

- The 2018/19 season, the driest season since at least 1981 in central and western parts of the region, was marked by delayed and erratic onset of rains, mid-season dry spells, and early cessation of rains. From October 2018 to early April 2019, parts of southern Angola, northern Namibia, southern Botswana, northern South Africa, southern Zambia and northern Zimbabwe registered significantly below average rainfall (50%~ below average, **Figure 1**).
- The 2018/19 season also saw an unprecedented event of back to back cyclones (Idai and Kenneth) striking Mozambique. As a result, parts of northern and central Mozambique received significantly above average rainfall, leading to widespread and unprecedented

flooding in central and northern Mozambique. Cyclone Idai also affected southern Malawi and eastern Zimbabwe, and Cyclone Kenneth also brought above average rainfall to southeastern Tanzania.

- Overall, there has been a reduction in planted area and wilting of crops in drought affected areas, and damage to standing crop awaiting harvesting in cyclone affected areas (**Figure 2**). Reduced planted area and reduced yield/crop failure in multiple parts of the region, combined with crop destruction due to flooding in other areas is likely to result in tighter regional supply and deterioration of the food security situation in the upcoming 2019/20 consumption year.

Figure 1 Rainfall (Percentage of Average) October 2018 - April 2019

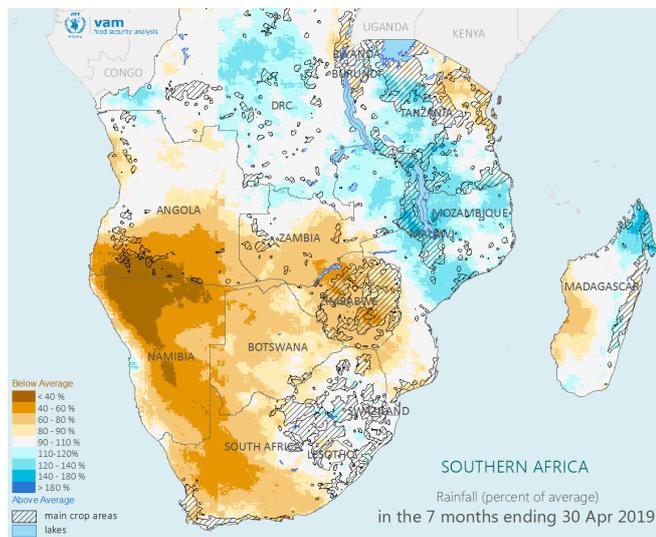
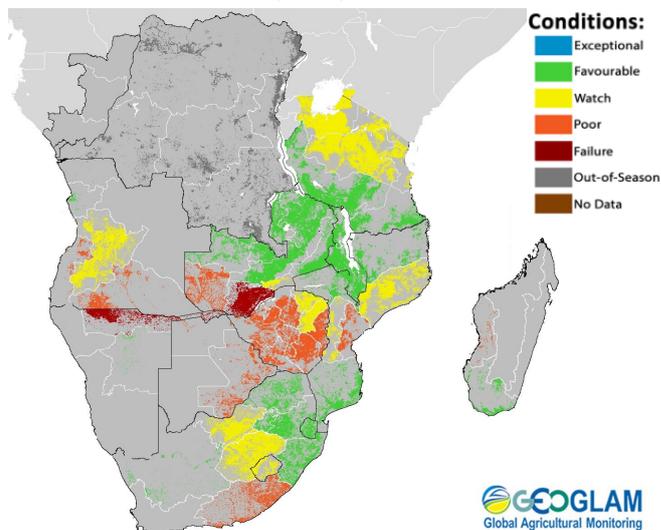


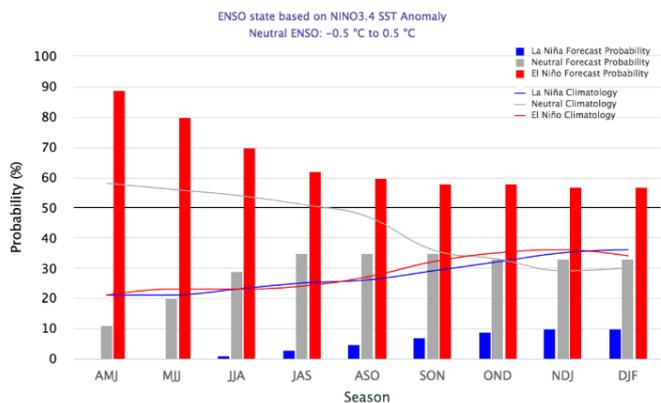
Figure 2 Southern Africa Maize Map As of 28 April 2019



El Niño Southern Oscillation Update

- Though not declared by the WMO, according to CPC/IRI, we are currently seeing a full-fledged weak El Niño, with both the atmosphere and ocean participating. The official probabilistic ENSO forecasts indicate 70% chance of weak El Niño conditions persisting until July 2019 (**Figure 3**), and most models/forecasters expect the Oceanic Niño Index to remain between 0.5-1.0 until the end of 2019, which would mean 2 consecutive years of weak El Niño.

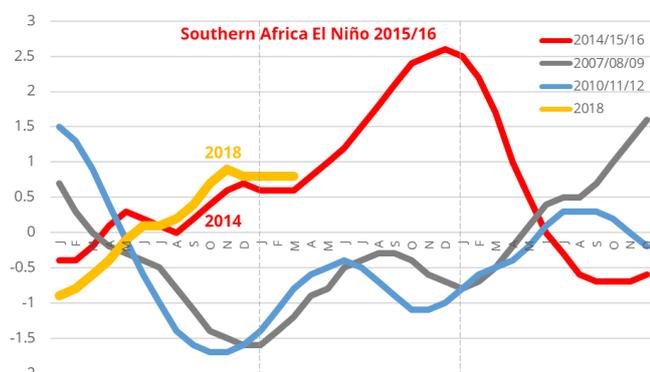
Figure 3 Early-May 2019 CPC/IRI Official Probabilistic ENSO Forecasts



Source: CPC/IRI

- The CPC's latest Oceanic Niño Index (3 month running mean of sea surface temperature anomalies in the Niño 3.4 region) stands at 0.8. Trends are similar to that of 2014, when despite weak signals, parts of the region experienced atypical dryness (Figure 4).

Figure 4 The Oceanic Niño Index (ONI)



Source: US Dept. of Commerce, National Oceanic and Atmospheric Administration

Country Updates

Eswatini

The 2018/19 season was characterized by erratic/poor distribution of rainfall and prolonged dry spells coupled with extreme high temperatures. Between October and December, extreme high temperatures were experienced in most parts of the country.

According to the Agriculture Rapid Assessment Report March 2019, national maize production is estimated to decrease by 22% from the previous year. The northeastern region of Hhohho, a key producing region, saw the largest drop (41%) in land under maize cultivation. Hailstorms, heatwaves, and crop pests such as the fall armyworm (which affected mostly the Lubombo and Shiselweni regions) have also negatively affected harvest prospects.

Despite recent rains, crop production in areas such as Lubombo and Hhohho regions is expected to be lower than that of the previous season, and the food security situation is likely to remain critical.

Lesotho

Preliminary results from the April 2019 LVAC Rapid Assessment and Analysis indicate that Lesotho experienced drought in the 2018/19 season, which will likely have a negative impact in the next consumption year. WFP Consolidated Approach to Reporting Indicators of Food Insecurity (CARI) estimates indicate an increase in the number of food insecure, from 274,000 (IPC Nov. 2018 results for Dec. 2018 – Feb. 2019 period) to 407,000 (rural) in the March-June 2019 period. As a point of reference, the 2015/16 rapid assessment (during the El Niño event) estimated the number of food insecure at 534,500.

Findings from the Rapid Assessment also indicate that an increasing number of households are resorting to alternative water sources (e.g. unprotected wells/springs). Overall, the food security situation is anticipated to deteriorate further in the next consumption year (July

2019 to June 2020).

Madagascar

At the national level, the 2018/19 season was relatively favorable with sufficient and well distributed rainfall in large grain producing areas. Although several cyclones formed in the southwestern basin of the Indian Ocean, none landed in Madagascar. Yet, periods of heavy rainfall did erode market access in most landlocked areas, and crop pest infestations (e.g. armyworms, migratory locusts) have been reported. A joint rapid assessment conducted by FAO and the Ministry of Agriculture indicates that the main maize crop for 2019 will be significantly affected by the armyworm outbreak. The full extent of their impact will be assessed during the CFSAM in July.

Although the southern region received fair rainfall this season, the food security situation remains precarious as it has yet to recover from the effects of the 2015/16 El Niño and the 2017/18 drought. Unlike the rest of the country which saw prices of staples decreasing in the first quarter of 2019, price increases have been recorded in the south. Some SMART surveys and data from ongoing monitoring in the south indicate a deteriorating nutritional situation.

A comprehensive food security assessment is currently being prepared to assess the situation in the south in May. The data obtained will feed into the planned IPC analyses in June so that the severity of food insecurity can be assessed and needs estimated up to September 2019.

Malawi

Most parts of Malawi experienced a favorable rainfall season in 2018/19. Although the Ministry of Agriculture estimates over 71,000 hectares of destroyed cropland in the south due to Cyclone Idai, the second round of the Agricultural Production Estimates Survey (APES) still projects 3.35MT of maize production this year - a 24% increase from the previous year. This should be sufficient to cover the national maize requirement estimated at approximately 3.3MMT. Overall, despite the floods which occurred in the southern region districts, the general picture is that crop production will be higher than that of the last season and the five-year average level.

Mozambique

As of the end of February, central and northern Mozambique were seeing favorable crop conditions, and above-average harvests were expected from March. However, Cyclone Idai hit central/southern Mozambique in mid-March, during the main harvest season. As of 22 April, it was estimated that over 715,000ha* of cropland was destroyed. In addition, Cyclone Kenneth is reported to have affected over 55,000ha* of cropland in the northern provinces. Although crop assessments and post-disaster needs assessments are yet to be completed, a reduction in crop production is expected in affected areas, and this could translate into higher import requirements this year.

*OCHA Flash Update figures

Namibia

From October 2018 to March 2019, the bulk of the country received 50% or less of average seasonal rainfall. Poor rainfall performance caused significant delay in cultivation activities, and as grazing conditions deteriorated, farmers were advised to destock/cull their livestock. With the exception of the north-eastern regions (Zambezi, Kavango West, and Kavango East), poor to critical grazing conditions are being reported throughout the country. As a result, a total of 64,000 livestock loss was recorded while a large number of livestock are reported to be still vulnerable. In early May, **Namibia declared a state of emergency on account of drought in all regions.**

Affecting food security at households levels, maize production forecast in the communal areas is estimated to reduce by 79% as compared to last season's harvest, and 78% below the average production levels. Total cereal production country-wide is expected to be approximately 71,400 tons for the 2018/19 crop season, representing a 53% reduction from the 2017/18 production. The reduction is attributed largely to the general poor rainfall coverage. Based on the national cereal balance sheet for the 2018/19 marketing year, Namibia is estimated to have a cereal shortfall of 150,800 tons, of which 123,300 tons was covered by commercial imports, leaving an uncovered deficit of 27,500 tons. Food and non-alcoholic beverages inflation rate has been rapidly increasing in the past several months, nearly doubling from 3% in October 2018 to 5.8% in March 2019. This increase in food prices raises concern for food security in the country.

Source: Agricultural Inputs and Household Food Security Monitoring Assessment Report, MAWF, December 2018 and the NCPI 2019 March

Zambia

According to the Zambia Meteorological Department's review of the 2018/19 rainfall performance, the southern half of the country experienced severe prolonged dry spells, extremely high temperatures and a late start to the season (early January 2019). In contrast, the northern half had an early start, characterized by excessive rainfall that resulted in localized flooding in some areas.

High maize producing areas in the south are experiencing their worst drought since 1981, and production prospects are poor. According to the Ministry of Agriculture, maize production is estimated to decrease to 2 million MT from approximately 2.4 million MT last season. From mid-April, an export ban on maize and maize meal has been in place. Limited maize supplies from Zambia will translate into tighter regional supply.

The projected number of households in need of food assistance is currently estimated at 220,000 households for the July 2019 - February 2020 period - a 38% increase from the 159,000 households in the previous season (October 2018 - March 2019).

Zimbabwe

According to the Second Round Crop and Livestock Assessment Report of the 2018/2019 Season (dated 5 May 2019), Zimbabwe's estimated maize production stands at approximately 777,000 tons, which is 54 percent lower than the 1.7 million tons harvested in the previous 2017/18 season. Total cereal production was estimated at 852,000 tons, against a national requirement of 1.8 million tons for human consumption and 450,000 tons for livestock. Even with the Grain Marketing Board's cereal stock of 590,000 tons, there is an estimated total deficit in grains/cereals of 760,000 tons.

Compared to the previous season, the provinces of Manicaland, Matabeleland South, and Matabeleland North all saw their maize production drop by more than 70 percent. Midlands, Mashonaland Central, and Mashonaland West saw their maize production drop by more than 50 - 60 percent. Even Mashonaland East, which saw the lowest drop in maize production, recorded a -32 percent change from the previous season. This drop in production, combined with the country's economic and fiscal challenges, raise concerns for the food security situation in the upcoming 2019/20 consumption year.

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Annual assessments by the Vulnerability Assessment Committees (VACs) are currently underway, and results are expected to be available in early July.



vam
food security analysis

