ZAMBIA Food Security Outlook — April through September 2011

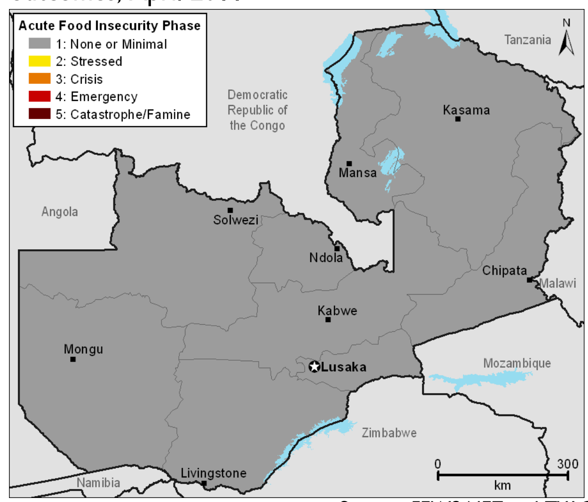
Beginning in April 2011, FEWS NET is transitioning to the Integrated Food Security Phase Classification's (IPC) Household-based Acute Food Insecurity Reference Table, which is scheduled for release with IPC version 2.0 in July 2011. For more information see: www.fews.net/FoodInsecurityScale.

Key Messages

- Food security conditions have improved across the country as the green harvest has increased household food supply and variety. Consequently, demand for maize on the market in rural areas has significantly reduced with increased reliance on the new harvest. Increased household food availability is supporting decreasing maize market prices benefiting market-dependent urban households.

- In the first part of the outlook period from April through June, food security is expected to continue improving given the increasing supply of food at both the household level and the market level as the new harvest becomes available. This situation is expected to hold even for areas which were of concern in the past few months such as Luangwa district. Overall, most households will not face acute food insecurity in the outlook period as the good production expected, in addition to the large carry over stock from the 2009/10 production, will guarantee relatively low maize prices.

Figure 1. Current estimated food security outcomes, April 2011

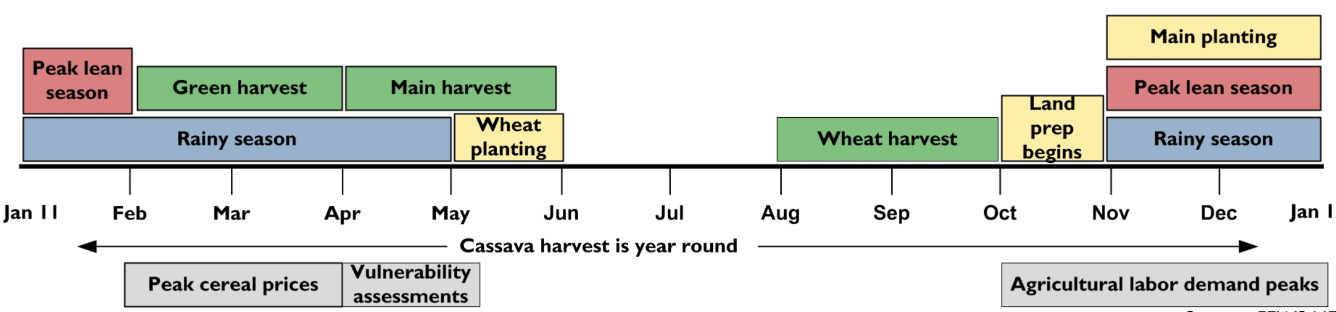


Source: *FEWS NET and ZVAC*

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

- Maize prices stabilized in March having reached their peak and are expected to start steeply falling in the April through June period in response to increased market supply and reducing demand. The prices are expected to remain relatively stable during the second part of the outlook period, July through September, and food security will remain stable.

Seasonal calendar and critical events timeline



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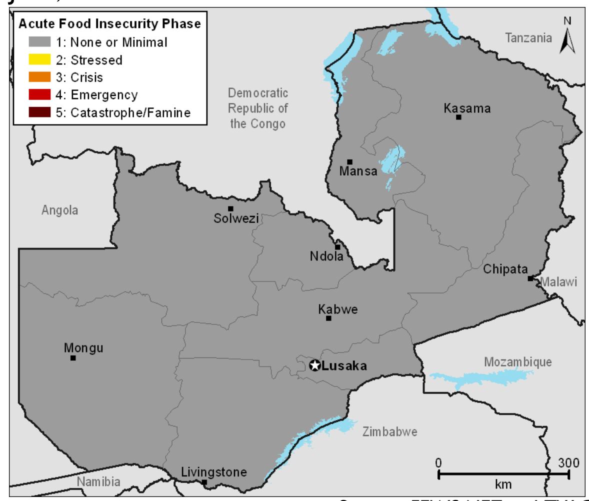
Current food security conditions

Generally the food security situation has remained stable as the 2010/11 production season comes to an end. Given the surplus harvest from the 2009/10 production season, most markets are still adequately supplied with staple foods. With the increased green harvest many rural households are accessing seasonal foods such as pumpkins, squashes, groundnuts, and sweet potatoes, which are reducing demand for maize and maize meal on the market. In the urban areas, increasing urban production is providing some early foods to some households while most are still depending on staple foods from the markets. Overall most households are accessing a variety of seasonal foods, which is likely translating into increased dietary diversity.

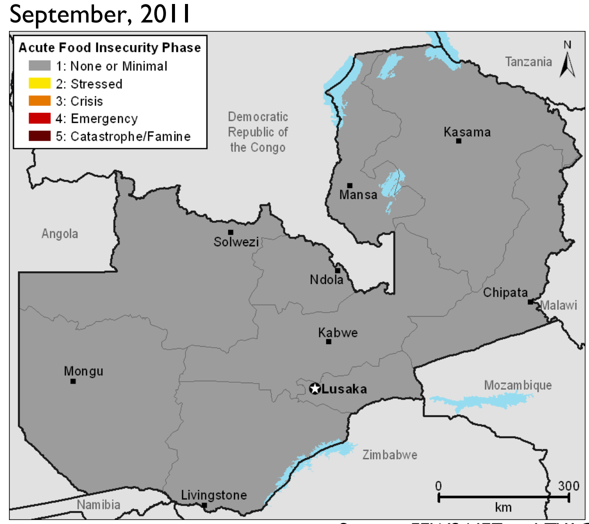
In the last few months, the areas of concern for food insecurity have been the districts of: Luangwa (Lusaka Province); Chama and Mambwe (Eastern Province); Siavonga, Gwembe, and Sinazongwe (Southern Province); Chavuma and Zambezi (Northwestern Province); and Lukulu and Kalabo (Western Province). The food security situation in these areas has generally improved with the new harvest. This is despite loss (permanent wilting) of some late-planted crops due to the impact of the extended dry spells at the critical stage of development in February in areas such as Luangwa and the Gwembe Valley. In Luangwa for instance, the general increase in land under production during the 2010/11 production season, with respect to the previous season, has helped reduce overall household food losses. In general, there is currently no acute food insecurity in these areas of concern. The poorer households that may be experiencing short-term food insecurity are mostly meeting basic food needs without eroding their livelihoods. Households are currently consuming maize as well as seasonal foods such as pumpkins and sweet potatoes from their own harvest. Consequently, the demand for maize from both the Food Reserve Agency (FRA) stocks in districts such as Luangwa and from small traders has drastically decreased. The maize price levels in the districts are reflecting this reduced demand for the commodity on the market.

Figure 2. Most likely food security outcomes, April-June, 2011



Source: *FEWS NET and ZVAC*

Figure 3. Most likely food security outcomes, July-September, 2011



Source: *FEWS NET and ZVAC*

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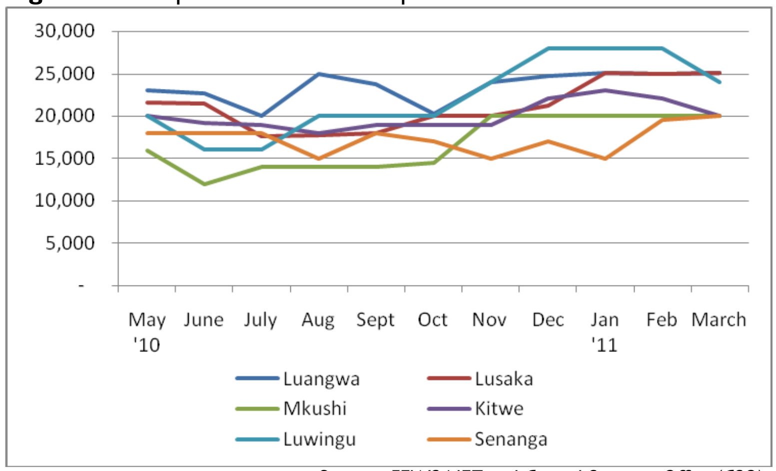
In the Chavuma and Zambezi region, increased green harvest crops and the start of the main harvest have increased food access for most households, improving the food security situation. Despite the disrupted physical access between the west and east banks due to the high water level in the Zambezi River, no cases of acute food insecurity are being reported. The poorer households have increased access to some basic foods through own production and the sale of labor at this time of the harvest season.

Following the improved rainfall in March in most areas, the rainfall activity has significantly decreased during the month of April marking an end to the 2010/11 rainy season. Most crops have already reached advanced stages of maturity with some grain left in the field to naturally dry before harvesting while the harvesting of early planted crops is currently taking place. The main harvest will continue into early May and by the end of April there will be an increase in food at the household level as the main harvest becomes abundantly available, marking the end of the 2010/11 marketing season and the beginning of the 2011/12 marketing season.

In line with the increased food availability at the household level, the price of maize (the staple food) generally stabilized in March (Figure 4) as prices reached their peak at a level mostly below five-year average and at much lower levels than the previous year. Even in the few areas which were of concern earlier, maize prices have stabilized in line with the stable food supply.

Most likely food security scenario, April through September 2011

Figure 4. Comparative maize retail prices in selected districts



Source: *FEWS NET and Central Statistics Office (CSO)*

The 2010/11 maize harvest is expected to be above average though much below last season's level owing to the extended dry spell which affected parts of southern Zambia in the middle of the growing season in February. The reduction in maize production by commercial farmers while increasing production of more rewarding crops such as soybeans also supports the expected decrease in the 20010/11 maize harvest. The extent of the dry spell impact on crops will be known once the crop estimate figures are available in May. The food security situation is expected to continue improving during the first half of the outlook period (April through June) for all wealth groups given the increasing supply of food at both the household level and the market level as the new harvest becomes available. Even in areas which were of concern where some crops permanently wilted due to the dry spells in February, the food supply will increase during this outlook period. In Luangwa district there will be much less reliance on grain from the neighboring districts of Nyimba and Petauke as market demand will significantly reduce. Fishing, a major livelihood in the district, will also contribute to accessing food through providing stable incomes for fishing households. Poorer households will employ normal seasonal coping strategies such as the sale of crafts and sale of non-farm labor to meet basic food needs. Field reports indicated that the maize harvest in Luangwa is likely to be slightly higher than in the previous season when the harvest was below average. Most households are only likely to run out of own food stocks after September making for a relatively good food security status for this low-producing area.

In the Gwembe Valley area the new harvest has also brought some relief and household food supply is expected to generally increase during the April through June period for all wealth groups. This situation is also expected to prevail even in areas which were affected by the dry spell resulting in improving food security conditions. In the Chavuma/Zambezi area, the food security condition will remain stable and households will generally be accessing basic foods from their own harvest. By June, the water levels of the Zambezi River will have sufficiently reduced allowing normal pontoon boat operations a key condition for the ease of food trade between the west and east banks. Generally, the price of maize will notably fall as market demand significantly reduces, especially in the rural areas.

Between July and September, most areas are expected to remain with no acute food insecurity as most households will still be able to meet their basic food needs without employing coping mechanisms which would erode their livelihoods given that the harvest is expected to be good despite that it will be below last season's levels. During this period, most households in low-producing districts which will be relying on the market will be able to access staple foods at average prices as the markets will remain well supplied. There is no district where the acutely food insecure population is expected to reach 20 percent or more of all households with respect to the total district population during the outlook period. Staple food prices are expected to remain at average levels and are likely to be stable between July and September.

Table 1. Less likely events over the next six months that could change the above scenario

Area	Event	Impact on food security outcomes
Chavuma/Zambezi Region	Early receding of flood waters	Normalizing trade between west and east banks by May boosting food security situation on the west bank beyond expectation.
Low-producing districts with prolonged dry spells in December and February	Staple foods run out in the markets	Maize shortage on the market resulting in maize price increases to abnormal levels leading to accessibility problems for the majority of the households to a level where government intervention in the form of food relief becomes necessary.