

SOUTHERN AFRICA Food Security Outlook Update

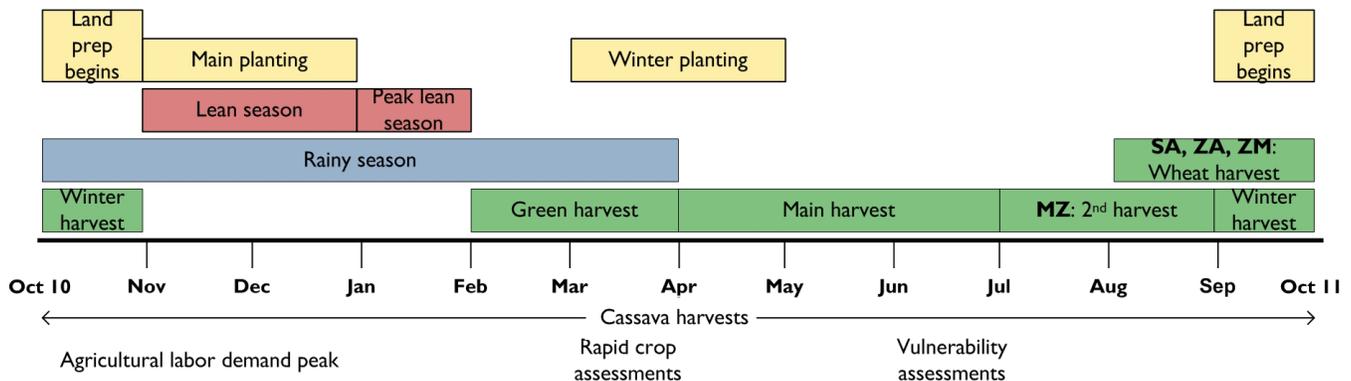
April 2011

Staple food prices decrease as availability of foods from green harvests increase

Key Messages

- The availability of a variety of seasonal food crops and fruits has greatly contributed to improved food security conditions across the region as the lean season comes to an end. On-farm availability of these foods has helped ease pressure on local markets, resulting in gradual food price decreases in some areas where crop growing conditions have been favorable.
- The decrease in staple food prices is expected to continue until the end of the harvest (July/August), when prices should stabilize before rising again as the lean season (October through February) approaches. Despite current decreases, prices remain above normal for this time of the year, threatening the food security of market-dependent households in urban and rural areas where rains were poor this season.
- Heavy rains received in March in the Cuvelai basin bordering southern Angola and northern Namibia resulted in severe flooding in northern Namibia. The flooding caused fatalities and the displacement of thousands of families causing the government to declare a national state of emergency on March 29th. This declaration will facilitate a large-scale response that includes the participation of international cooperating partners and other humanitarian agencies.

Seasonal calendar and critical events timeline



Updated food security outlook though June 2011

Food security conditions remain satisfactory for most households over much of the region with most local markets adequately supplied with staple foods and food access from own production gradually increasing. The on-farm availability of foods such as green maize, groundnuts, squash, pumpkins, sweet potatoes, fruits, and other seasonal crops is helping

This report provides an update to the February 2011 FEWS NET Food Security Outlook report which estimated food security conditions in the Southern Africa region through June 2011. The next Outlook report will be released in May and will cover the April through September 2011 period.

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ease pressure on local markets, resulting in the stabilization of food prices and in some cases earlier than normal food price reductions. National governments, humanitarian agencies, and private trader participation have all contributed significantly to regional food security stabilization. Informal cross border trade continues to play an important role in redistribution of staple foods across countries within the region. In areas where agro-climatic conditions have been favorable, food security conditions are expected to remain favorable throughout the outlook period. Staple food prices have started stabilizing (and in some cases decreasing) in many local markets in line with normal seasonal trends. Most markets are adequately stocked with staple food from the green and early harvests as well as last season's stocks that are now being off-loaded by private traders in preparation for the new crop expected in May/June.

Despite the generally satisfactory conditions, isolated pockets of moderate food insecurity continue to exist in parts of Tanzania where *vuli* and *masika* rains performed poorly, as well as in localized areas of Angola, Malawi, Mozambique, Namibia, Zambia, and Zimbabwe that were affected by either floods and/or the prolonged mid-season dry spells in February and March. Depleted household food stocks and the limited availability of green harvests could prolong the lean season forcing households to depend on market purchases for longer than normal. Food prices in these areas are expected to continue rising until the major harvest comes through in May/June.

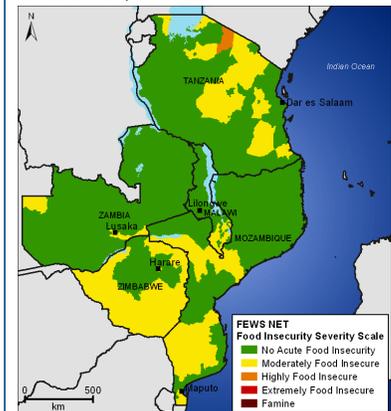
Crop production prospects for the 2010/11 production season vary across the region, depending on agro-climatic conditions (start of the season, rainfall performance, duration of mid-season dry spells, etc.), input availability and uptake, and agricultural management practices. Even though most countries are yet to release official crop production estimates, available information points to yet another good overall regional maize harvest. When compared to last year, production numbers could potentially be slightly lower due to production losses which have occurred in South Africa, Malawi, Mozambique, Zambia, and Zimbabwe as a result of floods and/or prolonged mid-season dry spells.

The severity of the impacts of these shocks to production varies from country to country. In Zambia, in the flood-prone areas of western Zambia where crop damage has been recorded, floods are expected to recede no later than June, but locals are expected to benefit from increased fish catches as the water recedes. However, in parts of the districts of Luangwa and Gwembe Valley that were affected by prolonged dry spells, moderate food insecurity conditions are likely in the April through June period due to the reduced (or absence) of green harvests.

In Mozambique, overall national crop production is expected to be normal given the good harvest prospects of the northern region, which is the most productive maize-growing area of the country. This is despite the crop losses that were reported in the flooded areas of the Limpopo and Zambezi River basins and the multi-year production shortfalls that characterize the semi-arid parts of the southern and central regions. Excess moisture from the heavy rains and floods will provide favorable conditions for crop growth in those areas where a second season crop is grown. In areas affected by prolonged mid-season dry spells, the early planted crop suffered less than those in the vegetative stages, most of which later recovered when the rains resumed.

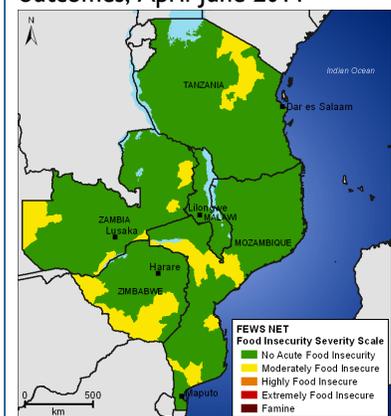
Although the overall impacts of the prolonged mid-season dry spells are yet to be assessed, all indications in Malawi point to a good national crop harvest and food security conditions are expected to remain good, save in localized areas that are currently receiving humanitarian assistance.

Figure 1. Most likely food security outcomes, March 2011



Source: FEWS NET

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



Source: FEWS NET

For more information on FEWS NET's Food Insecurity Severity Scale, please see: www.fews.net/FoodInsecurityScale

In Zimbabwe, crop production prospects, especially in Masvingo, Manicaland, Matabeleland South, and Midlands provinces, have been dampened by the prolonged mid-season dry spells, which negatively affected crop growth. It is very likely that the national cereal harvest for 2010/11 will be lower than the 1.5 million metric tons (MT) produced last year leaving a wider overall cereal deficit.

In Tanzania, failed *vuli* harvests and poor *masika* rains in the northern and northeastern parts of the country have extended the lean season, sustaining high market dependence, keeping prices high, and constraining food access for poor households.

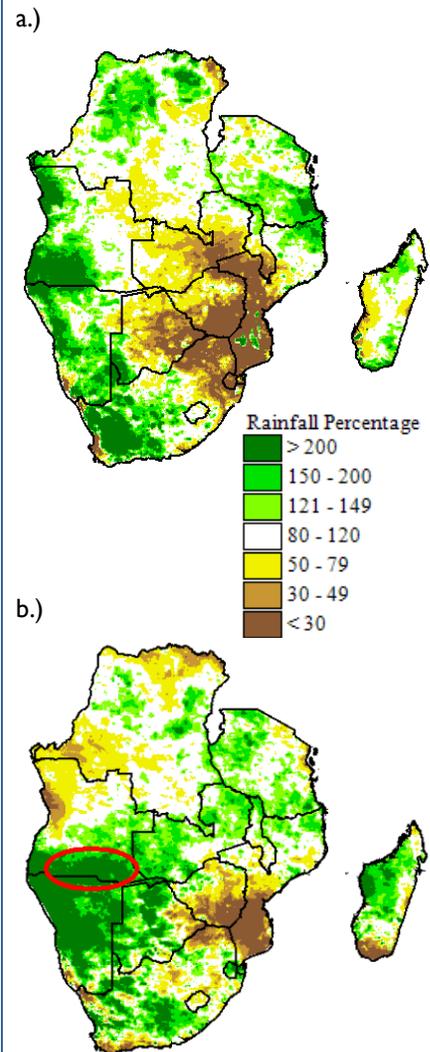
In terms of seasonal rainfall performance, in addition to the widespread dry spell of February that affected crops in parts of southern Malawi, southern Zimbabwe, southern Zambia, eastern Botswana, and northern South Africa, dryness continued into March in eastern Botswana, southern Mozambique, and Zimbabwe. The February dryness is reported to have caused permanent wilting to crops in several areas, particularly southern Zimbabwe and parts of extreme southern Malawi. South Africa reported a reduction of about two percent in their production estimates compared to previous estimates, attributing this reduction to the impacts of the dry spell in February in the northeast of the country. Crops in most parts of the region had already reached maturity by March due to significant amounts of early planting or had already been lost due to the February dryness, so the continued dry spell in March is not likely to have had much further impact on expected crop yields. Overall, the worst impact of the dry spell was on the late-planted crops with late planting occurring mainly due to the late start of rains in some areas, as well as other constraints including the lack of access to and availability of inputs. It is important to note that in many cases, dry spells affected areas which normally are dry and are annually food insecure, so the affects in those areas may not be as drastic when compared to an average year.

Reports from Mozambique indicate that despite the dryness, which lasted more than 40 days in most of central and southern Mozambique, the impact on crop yields was likely minimal, particularly in the central areas where crops were reported to be in good condition. In the southern areas, the dryness occurred when most crops were already mature. The main impacts of the dry spell may be in areas where second season crops are grown, as available moisture will be significantly reduced due to the extended dryness. The northern areas have been experiencing good rainfall so far and average to above-average production is possible this season.

In Malawi, crop conditions in central and southern Malawi are reported to be good despite the February dry spell which had reportedly affected mostly the late-planted crops in extreme-southern Malawi. Meanwhile the southern districts of Chikhwawa and Nsanje experienced floods again this year and the residual moisture from these floods is expected to benefit winter irrigated farming increasing household food availability and income sources. However these two districts remain areas of concern for food insecurity and need to be closely monitored throughout the outlook period and beyond.

Meanwhile, heavy rains received in March in the Cuvelai basin bordering southern Angola and northern Namibia resulted in severe flooding in northern Namibia (highlighted area in Figure 3b). The Kavango River in northern Namibia also sustained flooding due to heavy rains. The affected areas are within the main grain-producing regions in the country and include Oshana, Ohangwena, Omusati, Oshikoto, Kavango, and Caprivi regions. The flooding caused fatalities and displacement of thousands of families causing the government to declare a national state of emergency on March 29th. This declaration will facilitate a large-scale response that includes the participation of international cooperating partners and other humanitarian partners. A joint multi-sector rapid assessment mission is scheduled to start in the first week of April.

Figure 3. Rainfall as percentage of average for (a) February 2011 (b) and March 2011



Source: USGS/FEWS NET

Given the above context, and with the exception of the localized areas of moderate food insecurity, regional food security conditions are expected to remain satisfactory throughout the April through June period. On-farm food stocks as well as local market supplies will improve significantly as carryover stocks are augmented by early harvests as well as the main harvests. Staple food prices in local markets will continue to drop seasonably following normal trends and are expected to begin rising just before the next lean season starts in October/November. The decrease in food prices will greatly improve food access especially for very poor and poor households who do not grow sufficient food crops but depend on markets to access staple foods.

Areas where food security conditions will remain a concern include northern, northeastern, and central areas of Tanzania due to poor *vuli* harvests in most parts of bimodal areas and the poor performance of the *msimu* rains in the unimodal areas; the flood-affected and mid-season drought-affected areas of central and southern Mozambique; the western and southern districts of Zimbabwe (Masvingo, Manicaland, Matabeleland South, and Midlands provinces); the extreme southern and western parts of Zambia (Gwembe and Luangwa Valleys); and the southern districts of Malawi (Mangochi, Machinga, Balaka, Neno, Mwanza, Blantyre, Chiradzulu, Thyolo, Mulanje, Chikhwawa, and Nsanje districts). On-going humanitarian food assistance will help improve food access if continued through the outlook period. 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 beyond the outlook period.