Famine Early Warning Systems Network
SOUTHERN AFRICA FOOD SECURITY BRIEF
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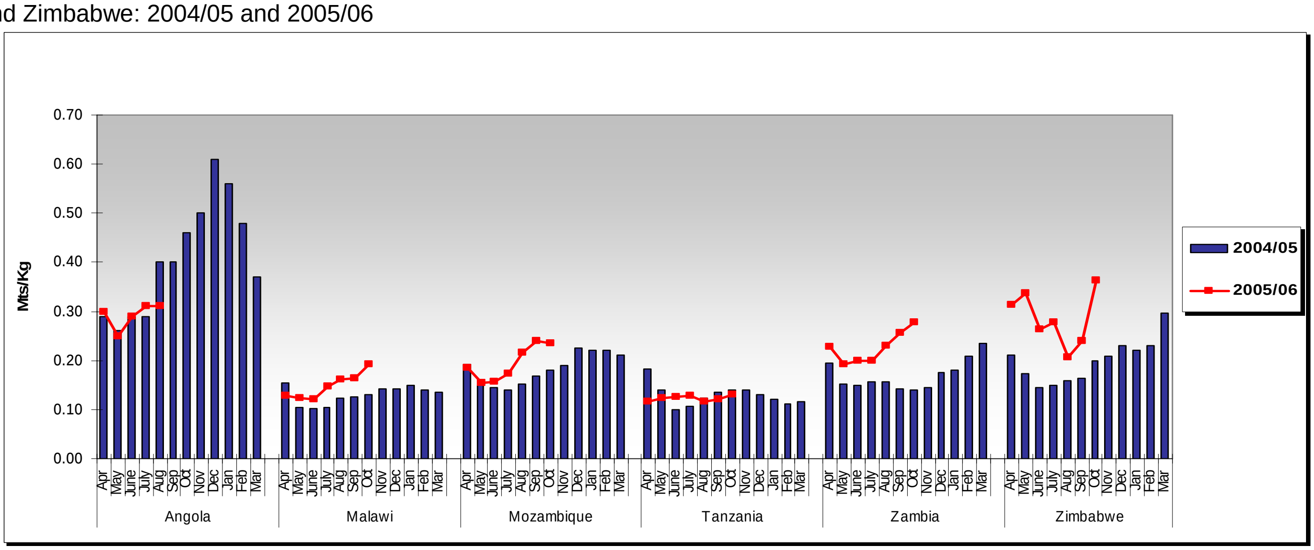
EXECUTIVE SUMMARY

As the hunger season begins in earnest in Southern Africa, the food security situation is rapidly deteriorating in those countries facing severe food shortages as a result of a poor 2004/05 crop production season. Whatever household food stocks that were available have been drawn down, and levels of purchases are constrained by very high food prices, limited purchasing power and lack of employment opportunities. While vulnerability assessments conducted in May 2005 revealed high levels of food insecurity (with an estimated 10 million people in the region requiring humanitarian assistance); it is believed that these numbers have significantly increased as the situation deteriorates more rapidly than had been assumed. Food access problems are most pronounced in Southern Malawi, Zimbabwe and parts of Zambia and Mozambique. With the onset of the rainy season, it is recommended that governments and partners intensify efforts to ensure timely delivery of adequate requisite inputs so that farmers can take full advantage of the predicted good rains this season.

FOOD SECURITY SUMMARY AND CURRENT INTERVENTIONS

The latest food security assessments indicate that many vulnerable households in the affected countries of Zimbabwe, Zambia, Malawi, parts of Lesotho, Mozambique and Swaziland are now facing critical food shortages, and have run out of own food stocks. Exacerbating food security problems are rapidly rising staple food prices coupled with very slow progress in planned commercial imports and slow food aid delivery rates. October retail food prices (as shown in figure 1) increased significantly in response to fast dwindling supplies, raising grave concerns about severe food access problems among vulnerable populations. Although intra-regional trade has continued to play an important role in filling some of the food gap, current import rates into deficit countries are very slow. Limited supplies in Mozambique, for example, have meant a huge decline in its informal exports to neighboring Malawi. Barriers to trade, such as high import levies, stringent phytosanitary regulations and export bans, have also acted to constrain formal and informal trade levels between Zambia and its neighbors. However, there has been a noticeable increase in Tanzania exports to Malawi and Zambia following recent harvests.

Figure 1. Average maize retail prices (US$/kg) in the monitored markets of Angola, Malawi, Mozambique, Tanzania, Zambia and Zimbabwe: 2004/05 and 2005/06



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

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Recent assessments in **Malawi** indicate that household food security is increasingly deteriorating in the southern region. The MVAC had estimated that between 4.2 and 4.6 million people would require humanitarian assistance, with the worst case scenario based on maize price increases of between MK32/Kg and MK40/kg. By October, prices had already exceeded this price band in some local markets in the south and lakeshore areas. The rapid rise in prices has raised both individual food needs as well as numbers of those unable to meet their food needs. The MVAC has updated its analysis which now shows that the population at risk now stands at 4.8 million. The recent assessments revealed high levels of extreme coping mechanisms; not commonly employed at this time of the year, and incidences of increasing malnutrition levels in some districts have been reported. Emergency interventions, though initially inadequate, have played a significant role in staving off hunger by improving food availability at both household level and at local markets. The inadequacy of international response is underlined by the fact that of the planned cereal distributions between April and October; only 60% was achieved. However, due to increasing reports of a rapidly deteriorating situation, more resources have been made available; consequently, WFP's cereal pipeline for Malawi for the period December to June 2006 is now fully resourced (tables 1 and 2). All 4.8 million people at risk will receive assistance through WFP (covering 45% of the population) and the government (DFID supported) voucher scheme that is targeting the remaining 55%. There is a danger however that pipeline breaks may occur before the end of the hunger season as a result of inadequate regional transport infrastructure, and the current huge demand to import both food and inputs (fertilizers), not only by Malawi but also other neighboring States.

Table 1. Food aid (cereals) distributions during period April - October 2005 (Metric tons)

	Planned	Distributed	Percent distributed
Lesotho	30,250	22,750	75
Malawi	60,721	36,622	60
Mozambique	35,406	12,830	36
Swaziland	8,874	7,633	86
Zambia	44,677	22,721	51
Zimbabwe	79,405	21,922	28
TOTAL	**259,333**	**124,479**	**56**

Source: Based on data from WFP (ODJ) and C-SAFE (covering Lesotho, Zambia and Zimbabwe)

Reports from **Zimbabwe** indicate acute staple food shortages, and there are fears that this hunger season will be severe as the country grapples with a hyper inflation (411% in October) that continues to push the cost of living beyond the reach of most rural and urban households. Household food access is extremely problematic because of a shortage of supplies on the markets, very high market prices, and the continued erosion of purchasing power. Although by the end of November, significant amounts of maize had been imported commercially (685,214 MT - or 57% of the planned 1.2 million MT); internal distribution bottlenecks are restricting grain availability, particularly in the remote areas. While the ZimVac had in June 2005 estimated that between 2.9 and 3.9 million people would require humanitarian assistance, the conditions described above have led to a surge in the number of the food insecure, many of whom require immediate assistance in order to survive the hunger season.

Table 2. WFP Southern Africa Regional PRRO: Cereal requirements for December 2005 - June 2006

	Total Required	Available in Pipeline	Shortfall/ Resourcing Needs
Lesotho	15,710	11,906	3,804
Malawi	87,781	87,781	0
Mozambique	43,929	43,130	799
Swaziland	9,147	9,147	0
Zambia	63,117	59,917	3,200
Zimbabwe	208,835	185,524	23,311
TOTAL	**428,519**	**397,405**	**31,114**

Source: World Food Programme (ODJ); December 2005.

In **Mozambique**, the recent Technical Secretariat for Food Security and Nutrition (SETSAN) food security and nutrition assessment indicates rising malnutrition rates and a further deterioration in the food security situation of households not only in the drought affected provinces in the south and central regions; but also in some parts of the northern region which were previously assessed as food secure. The updated figures now show that a total of 801,000 people (against the 587,000 assessed in May) will require immediate assistance until March 2006. Increasing food insecurity is attributed to increasingly limited food supplies, exacerbated by a poor second season crop and slow deliveries of emergency supplies, very high food prices (compared to average and last year), very limited water availability, and exhausted coping capability. WFP's current emergency plans need to be scaled up from the planned 47,970 MT (which though fully resourced now falls below the revised requirement of 83,000 MT by about 42%) and urgent resource mobilization is needed. In November, WFP planned to cover 534,000 beneficiaries (or 66% of population at risk); this will be scaled up to 73% over the period January to March 2006.

The government of **Zambia** has recently declared the food shortages in the affected parts of the country a disaster; thus paving way for a coordinated international response to complement its current relief efforts. This follows a marked deterioration in food access in the drought affected districts. The Zambia VAC is currently updating its analysis; and numbers requiring assistance are likely to rise from the earlier estimates of 1.2 million. However, both commercial and food relief responses to Zambia's food shortages have been very slow. Commercial imports have been very slow (by end of November, only 10,653 MT out of a possible 200,000 MT were delivered) as a result of government's delayed lifting of the 15% import duty, and the new phytosanitary regulations that require that all maize imports be certified GMO free. Dwindling maize supplies are reflected in the marked increases in maize prices, while delayed importation is increasing pressure on already tight market supplies which could lead to a spiraling of prices particularly as the hunger season progresses. Government's relief efforts have also been very slow with only 13,000 MT of food distributed since June, when the VAC had estimated that 118,000 MT would be required between July 2005 and February 2006.

In **Lesotho** and **Swaziland**, where 2004/05 harvests fell far short of domestic consumption requirements, the numbers of food insecure populations are estimated at 549,000 and 227,000, respectively, for the period up to March 2006. While food prices have remained stable in Lesotho (year on year food inflation rates for September were estimated at 2.4% compared to 1.8% in August), in Swaziland food prices have been rising rapidly as evidenced by the sharp increase in the food inflation rate from 8.2% in September to 13.6% in October. In both these countries however, many of the food insecure households are unable to purchase adequate supplies and are increasingly dependent on food aid. Table 1 above shows comparatively higher levels of food aid distributions achieved in these two countries for the period April to October. In addition, the commercial maize import program in Lesotho is on track (71% of planned imports delivered), which may explain the more stable food prices.

Table 3. Maize import progress: April - November 2005
Countries under WFP Regional PRRO for Southern Africa ('000 MT)

	LES	MAL	MOZ	SWA	ZAM	ZIM
Assessed Import Gap	118	939	-	57	186	1355
Imports Received	**78**	**118**	**92**	**24**	**44**	**710**
Commercial	55	81	79	16	21	688
Food Aid	23	37	13	8	23	22
Imports Expected	32	317	98	20	135	807
Commercial	23	152	41	14	64	512
Food Aid	9	165	57	6	70	295
Total Imp. Planned	**110**	**435**	**190**	**44**	**179**	**1,517**
% Imports received	***71***	***27***	***48***	***54***	***25***	***47***

Source: National Early Warning Units, FAO/WFP CFSAM-July 2005 and WFP (ODJ), FEWS NET/WFP Cross border initiative, SAGIS, and C-Safe

Elsewhere in the region, 2004/05 food crop production was also assessed to have fallen far short of domestic requirements, with many countries (apart from South Africa, Tanzania, and Angola) indicating lower levels of cereal availability compared to last year. This has resulted in localized areas of food insecurity in many of them; a situation that left unaddressed will worsen throughout the hunger season. In **Tanzania** for instance where the overall food supply situation is satisfactory, a rapid vulnerability assessment conducted in August in areas that experienced harvest shortfalls estimates that between November and January, some 594,500 persons in 34 districts of the country will require 21,000 MT of food assistance to be provided through the government's Strategic Grain Reserve. In **Angola**, despite improved harvests, production still falls far short of national requirements, and pockets of food insecurity and high levels of malnutrition prevail countrywide. Assessments in the Planalto region by various agencies (including the WFP VAM), which were conducted before the main harvest season, identified large numbers of food insecure and vulnerable populations that still require emergency food assistance. Similarly, in **Namibia** food supply assessments in May carried out in the densely populated northern crop growing regions identified areas of critical food shortages suggesting a need for emergency assistance as a result the below normal crop harvests. Much of the food production shortfall in Namibia as well as in **Botswana** is expected to be filled through commercial imports of the staple maize crop from neighboring South Africa. SAGIS records for the period 2 April to end of November, indicate white maize imports of 18,455 MT (or 65% of plans); and 118,450 MT (or 83% of the requirement) for Botswana.

Table 4. South Africa maize exports: April - November 2005 (MT)

	Exports to SADC member States									TOTAL
	Ang	Bot	Les	Moz	Mal	Nam	Swa	Zam	Zim	
White Maize	22,077	118,450	53,404	78,682	13,114	18,455	15,689	10,653	686,736	1,017,260
Yellow Maize	311	9,915	1,637	5,377	-	12,210	20,846	-	1,229	51,525

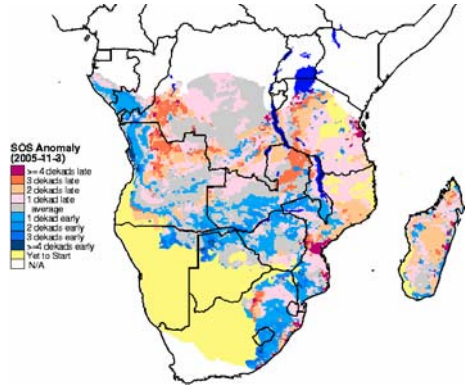
Source: South African Grain Information Service (SAGIS)

Most SADC States are sourcing their import requirements from **South Africa** whose exportable surplus for the 2005/06 marketing year is estimated at 5.61 million MT. Moving out such a sizable surplus has proved a challenge; by mid November, 1.24 million MT of both white and yellow maize had been exported. Although the domestic price maize remains low compared to the last two years, it has been increasing steadily as the lean season approaches and neighboring States increase their orders. By the end of November, nearby white maize prices on the South African Futures Exchange (SAFEX) stood at an average of R907/MT compared to the low of R539/MT in March. On November 25th, the December 2005 and March 2005 futures were trading at R926/MT and R948/MT, respectively. Low maize prices, as well as transportation bottlenecks (including rail wagon availability and high fuel costs) are restricting the pace and volume of exports, and may (according to estimates from the Department of Agriculture) limit the total maize that can be exported to about 1.82 million MT leaving a carryover stock of some 3.79 million MT.

Intentions to plant canvassed from South African farmers at the end of October show a huge decrease in the land to be planted to maize this coming season (up to 53%), largely in response to the over production that has led to low maize prices and the large carryover stock. This has contributed to the sharp increase in maize prices on SAFEX. However favorable weather conditions being forecast and a sustained increase in prices may result in an upward revision of these intentions. Estimates from Enviro Vision (Maize Vision No 69) suggest that, at average yields, the reduced area to be planted could yield in a crop of between 6 and 7 million MT which together with the carryover stock from this season, would still be adequate to meet domestic requirements.

START OF SEASON PROGRESS

Figure 2. Onset of rains compared to average conditions as at 30 Nov 2005



Source: FEWS NET USGS

Rainfall appears to be starting on time across many parts of the SADC region. Figure 2 shows the start of the rainfall season compared to average conditions as at 30 November 2005. Yellow shows areas where the season has not yet started, and is not yet expected to have started by this time. The grey shows the areas where the season started on time. Dark orange and red colors show areas where the season is significantly late. Pink and orange show areas where the season is a little late, while light blue shows areas where the season started a little early. The rainfall season usually starts in November across much of the SADC region, with a few areas starting in October and December. A few areas received rainfall in September and October; while many received good rains in the in November, again suggesting a good start to the season. Overall, the season appears to be progressing well, with most areas having started on time. However, areas of developing concern, where the start of season is now quite late, include parts of central Mozambique, western Tanzania, and northern Zambia. The latest Drought Monitoring Centre seasonal outlook Update indicates a likelihood of normal to above normal rainfall over most parts of the region for the period December 2005 to February 2006. However, eastern Tanzania, south western South Africa, western Namibia and western Madagascar are forecast to receive normal to below normal rainfall.

Field reports indicate that land preparation is in progress, and sowing of maize has already started in some few parts of the region. The areas where this is happening include some of the areas depicted as having experienced a start of season already. The recent rains will also be bringing much relief over the next few weeks for some livestock areas where, because of the poor rains received in the 2004-2005 season, the forage was in poor condition, with some unconfirmed reports of livestock deaths due to poor grazing. Seasonal preparedness, especially in terms of acquisition of requisite inputs (seed and fertilizers), appears to be a serious constraint to production recovery throughout the region. In some countries, available inputs (especially fertilizers and draft power) are insufficient to meet national requirements, while at the same time, costs of what is available are reportedly too high and beyond the reach of most vulnerable households. Distribution of available supplies to local markets is being constrained by high transportation costs with available trucks competing to move the needed food supplies to deficit areas. The onset of rains may compound these problems as some roads particularly in remote areas become impassable. Reports also indicate that inputs support programmes for needy smallholder farmers (those that experienced crop failures last season) are not only inadequate to meet the needs of many of the identified vulnerable farmers, but implementation has been delayed and very slow. Timely provision of free and/or subsidized inputs is critical if those farmers affected by last season’s drought are to recover and be able to take full advantage of the forecasted good rainfall season. There is an urgent need for additional resource mobilization that will facilitate scaling up inputs assistance programs; ensuring that farmers receive adequate inputs timely.

The Southern Africa Food Security Brief draws from the FEWS NET monthly reports, with additional contributions from network partners including FEWS NET/USGS, the SADC Regional Remote Sensing Unit, SADC Regional Early Warning Program – Gaborone, and the SADC Regional Vulnerability Assessment Committee comprised of SADC FANR, FAO, WFP, FEWS NET, SC (UK), and OCHA. Additional information is drawn from the National Early Warning Units and Meteorology Services in SADC member States.