# Southern Africa Regional Food Security Update

**May 21st 2010**

<table>
<thead>
<tr>
<th>Country</th>
<th>Information</th>
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<tbody>
<tr>
<td>Lesotho</td>
<td>The crop forecasting exercise is being undertaken by the Bureau of Statistics; data analysis is expected to finish this week. The LVAC will be undertaking its annual post-harvest livelihoods assessment from 25 May - 2 June.</td>
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<td>Madagascar</td>
<td>The Meteorology Department informed that the overall rainfall in the country is forecasted to be lower than normal during the May to July 2010 period.</td>
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<td>Malawi</td>
<td>The general food security situation in the country is normal following the 2009/10 harvest, apart from some households in eight districts in the southern region that will harvest little or nothing due to loss of crop from the long dry spells. These households will need assistance. The prevailing average maize price of MK38.72 ($0.26) per kg is below the Government’s set maximum selling price of MK52.00 ($0.35) per kg.</td>
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<td>Mozambique</td>
<td>Ministry of Agriculture carried out assessment in late March 2010 and the results indicate that overall production in the north of the country is favorable. The Crop and Food Supply Assessment joint mission MINAG-FAO/WFP requested by Minister of Agriculture is on going. SETSAN/GAV is preparing a vulnerability assessment to take place in June 2010.</td>
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<td>Namibia</td>
<td>April 2010 generally much wetter than normal in the northern parts of the country, with heavier falls at Katima Mulilo, Rundu, and Ondangwa. Southern parts of the country relatively dry, except around Keetmanshoop. Cumulative seasonal rainfall (October 2009 to April 2010) also fairly higher than normal in the northeast and central northern regions.</td>
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<td>Swaziland</td>
<td>Harvesting of maize and cotton is ongoing but estimates are that the 2009/2010 season maize harvest has increased by 6% compared to 2008/2009. The VAC annual assessment data collection has been completed and data analysis started on 14th - 22nd May. The fuel price has increased for the second time within a period of one month.</td>
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<td>Zambia</td>
<td>The Zambia Vulnerability Assessment Committee is conducting flood impact assessment in areas affected by flood in 2009/10 rainy season and are currently undertaking a Comprehensive Vulnerability Assessment and Analysis (CVAA). A recent increase in fuel prices by up to 13 per cent by the Energy Regulation Board is likely to trigger price increases of food and non-food items.</td>
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<td>Zimbabwe</td>
<td>Prices of maize grain start to decline as the harvest season progresses. Year-on-year inflation increases even though food inflation has been declining. ZimVAC findings are due towards the middle of June.</td>
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**SOUTHERN AFRICA REGIONAL FOOD SECURITY UPDATE: LESOTHO**

**Updated – 19 May 2010**

**Highlights**
- The crop forecasting exercise is being undertaken by the Bureau of Statistics; data analysis is expected to finish this week.
- The LVAC will be undertaking its annual post-harvest livelihoods assessment from 25 May - 2 June.

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<td>According to a report by the Lesotho Disaster Management Authority, the Ministry of Agriculture and Food Security (MAFS) estimated area planted for the 2009/10 season at 123,051 ha. The estimates also project maize production for 2010 to be 72,398 MT (16% increase over 2009 production). A crop assessment has been undertaken by the Bureau of Statistics and it is expected to provide more information on the areas planted as well as the crop situation. Observations are that increased production is expected in spite of lower plantings. The preliminary findings indicate that the yield has increased significantly. The preliminary report is expected this week.</td>
<td>The planned imports for the 2009/10 season amounted to 147,000 MT. The slight increase in production this season could reduce the expected imports by a fraction, though not by much. The NEWU has not yet released the 2010/11 balance sheet as they are waiting for BoS to release latest estimates.</td>
<td>WFP pipeline for vulnerable group feeding in Lesotho is under resourced. A shortfall of 3595 MT is indicated between February and July 2010. According to WFP monitoring reports, as of April, urban prices declined by 4 percent compared to the previous month; while there was no change in rural prices. There was also a slight decrease (0.6 percent) in the wholesale prices (Ministry of Trade and Industry - Marketing Department). Compared to last month, petrol prices increased by 1 percent; diesel by 3 percent and paraffin by 4 percent. Since January this year, fuel prices have been increasing. The Bureau of Statistics has estimated the annual inflation rate at 4.2 percent at the end of March (from 4.3% in February). Food inflation continues to decline; having dropped from 3.5% in February to 3.0% in March.</td>
<td>The Food and Nutrition Coordinating Office (FNCO) and WFP in partnership with Ministry of Health and Social Welfare (Family Health Division), Ministry of Agriculture and Food Security National University of Lesotho, and UNICEF, have undertaken a food consumption study in the Mountain Livelihood zone. The results show that 75% of calories come from carbohydrates. Based on the findings of the 2007/2008 National Nutrition Survey, the UNDAF framework and in support of the on-going Government programmes to combat chronic malnutrition in the country, the UN system (WFP, UNICEF, FAO and WHO) plans to implement jointly a nutrition programme from 2010 to 2012.</td>
<td>The Government is experiencing the reduction in the Southern Africa Customs Union revenue and this has negative impact on the government budget. This figure declined from 35% in 2009/10, and will further reduce to 17% in 2010/2011, putting much pressure on the Government. According to the 2010 budget speech, the preliminary estimate for economic growth in 2009 is 2.1 percent compared to 4.4 percent in 2008, which represents a decline of over 50 percent. It is expected that the mining, manufacturing and telecommunications will boost the economy and increase the growth to 3.6 percent. The LVAC will be undertaking its annual post-harvest livelihoods assessment from 25 May - 2 June.</td>
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## Highlights

- The Meteorology Department informed that the overall rainfall in the country is forecasted to be lower that normal during the May to July 2010 period.

### Agriculture Situation

- The Early Warning System SAP reports very erratic and insufficient rainfall in the drought prone south. It detected an extension of the lean season.
- Most of the food crops grown in the South (maize, rice, cassava, black eyed peas, and water melon) have been heavily affected by the dry spell.
- The joint Impact Assessment carried out by the Food Security & Livelihood Cluster in the South reported that 88% of surveyed household expect bad harvest between May and July.
- As part of the evaluation of the 2009/2010 farming campaign and food security situation that will be jointly conducted by FAO-WFP-IFAD-MoA, a one-day workshop will be held on 20 May 2010, with the participation of the major stakeholders in the food and agricultural sectors. The workshop aims at qualitatively evaluate the situation, and orientate the quantitative survey.

### Food Availability

- Rice from the first crops of this year has begun arriving in the markets.
- All markets remain well-stocked with domestic rice.
- The joint Impact Assessment carried out by the Food Security & Livelihood Cluster in the South reported that the markets are well supplied but from extra-regional sources, which has a negative impact on prices.

### Food Access/Prices

- Between March and April 2010, the overall consumer price index increased by 0.3 percent.
- However, the prices of basic essentials (rice, sugar, flour, vegetable oil, soap) have showed a downward trend in some major markets over the same period. According to the INSTAT, these prices have reduced by 0.6% mainly due to the drop (about 40%) in household consumption as the purchasing power continues to dwindle because of the persistent political crisis.

### Nutrition, Health and Food Utilization

- Two SMART surveys conducted in 5 districts in the South in early April showed an improvement in nutrition status compared to April 2009 (when GAM levels exceeded 10%) and no significant difference from November 2009.
- The situation is nevertheless declared “at risk” but not still “in emergency” for the moment.

### Comments

- Preliminary findings of rapid assessment conducted by the Food Security & Livelihood Cluster in the Southeast after the MTS “HUBERT”:
- More than 70% rice crop destroyed and 90% losses on cassava, sweet potatoes
- Because of silting, only 65% of rice field could be recovered for the off-season campaign starting in July.
- In order to recover losses on food crops, beside re-launching sweet potatoes season, households are shifting to grow maize and market gardening which are new for them (change in behaviour)
SOUTHERN AFRICA REGIONAL FOOD SECURITY UPDATE: MALAWI

Updated – 6 May 2010

**Highlights**

- The general food security situation in the country is normal following the 2009/10 harvest, apart from some households in eight districts in the southern region that will harvest little or nothing due to loss of crop from the long dry spells. These households will need assistance.
- The prevailing average maize price of MK38.72 ($0.26) per kg is below the Government’s set maximum selling price of MK52.00 ($0.35) per kg.

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<td>• The 2nd Round crop estimates predicts a national harvest of 3.2 million MT of maize, which would result in about 0.533 million MT surplus over national requirements of 2.45 million MT.</td>
<td>• In general, food security situation currently remains favourable for most households in the country following the 2009/10 growing season harvest.</td>
<td>• The market price for maize in May 2010 was slightly lower than that in the previous month. The average selling price of maize in April 2010 at local market was MK38.72 ($0.26) per kg compared to March average of MK43.75 ($0.29) per kg.</td>
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<td>• The CFSVA study conducted by the MVAC with WFP support found lower levels of wasting in the North (2.6%) compared to Central (3.9%) and South (3.6%) similar pattern were observed for underweight (9.6%). Prevalence of underweight was highest in the South (12.2%) followed by Central (10.7%) regions. The prevalence of stunting, however, was highest in the North (65.3%) compared to the Central (57.6%) and Southern (59.1%) regions.</td>
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<td>• The Malawi VAC (MVAC) has collected and analyzed data on food security situation in all regions in the country. The official results are expected to be released soon.</td>
<td>• However, some households in Balaka, Chikwawa, Mwanza/Neno, Nsanje, Phalombe, Thyolo and Zomba districts will harvest little or none at all and need assistance as early as May-June 2010.</td>
<td>• When compared with the previous year, maize price for April 2009 was at MK45.36 ($0.30) per kg. This shows that the price decreased in April 2010 by 10% compared to March 2010 and by 13% compared to April 2009.</td>
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<td>• However, the preliminary figures show that 1.061 million people in all 13 southern districts and one each in the central and northern regions will require an equivalent 45,364 MT of maize assistance from June 2010 to March 2011.</td>
<td>• The same households were also affected by prolonged dry spells in the previous growing season and have no access to irrigation.</td>
<td>• The new ADMARC price approved by the government in 2010 is MK60 ($0.40) per kg. As a result many ADMARC depots are not selling because the local maize vendors are selling maize at a lower price averaging $0.30 per kg this year.</td>
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**Southern Africa Regional Food Security Update: Mozambique**

**Updated – 19 May 2010**

**Highlights**

- Ministry of Agriculture carried out assessment in late March 2010 and the results indicate that overall production in the north of the country is favorable.
- The Crop and Food Supply Assessment joint mission MINAG-FAO/WFP requested by Minister of Agriculture is on-going.
- SETSAN/GAV is preparing a vulnerability assessment to take place in June 2010.

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<td>The Crop and Food Security Assessment joint mission MINAG-FAO/WFP 2009/10 requested by Minister of Agriculture is on-going: Preliminary findings should be presented to government on 28 May 2010.</td>
<td>Last year’s maize (bumper harvest) is still widely available at households and traders level in the centre but also in the South of the country, although the poor conditions of storage force household to sell their old stock. Because of the complete failure of the first season cropping in most of the South of the country, newly harvested maize is rare, especially in Chigubo and Mabalane in Gaza, Panda, Funhalouro, Inhassoro and Govuro in Inhambane, and Machanga in Sofala. WFP stopped its relief program beginning of May 2010.</td>
<td>The last VAC assessment (Feb. 2010) estimated that 456,290 people with extreme food insecurity will need food assistance from March 2010 due to failure of the 1st season cropping. In many areas however, late planting and opportunities for second cropping may provide relief for a few months. In these areas, maize, rice and/or sorghum in several local district markets were available in reduced quantities and at higher prices, in some cases at 500% higher e.g. in Chinde-Zambézia province. High transport costs aggravate the situation.</td>
<td>The reduced access to food is also indicated by the amount and type of food taken by households to milling units in rural areas. It was reported during the VA Feb 2010 that people take less maize, sorghum or bran in smaller quantities and they mix with roots to increase to volume to be milled. In most visited areas it was reported that households reduced number of daily meals from 3 to 2 or 1.</td>
<td>A good second season production in August/September may significantly change the projected food security conditions. Government has launched an official and massive campaign through inputs distribution to encourage households to maximize production during the second season. Massive planting is ongoing and government is supplying short cycle seeds in much of the central and southern regions to take advantage of the late rains and residual moisture.</td>
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<td>Ministry of Agriculture carried out a crop estimates assessment in late March 2010 and the results indicate that overall production in the north of the country is satisfactory.</td>
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<td>The situation in the central zone is mixed. In northern Tete province and the highlands of Zambézia province, there are expectations for good crop production, especially for maize. In the south, early planted crops, especially those from November, were severely affected by long dry spells and abnormally high temperatures that occurred in December and January. However, late planted crops, especially those from February onwards, are still in good condition and represent potentially successful crops, particularly in Maputo, Gaza and Inhambane provinces.</td>
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### Highlights
- April 2010 generally much wetter than normal in the northern parts of the country, with heavier falls at Katima Mulilo, Rundu, and Ondangwa.
- Southern parts of the country relatively dry, except around Keetmanshoop.
- Cumulative seasonal rainfall (October 2009 to April 2010) also fairly higher than normal in the northeast and central northern regions.

### Agriculture Situation
- Taking into account the estimated grain production of about 139,000 MT in 2008/09, it is projected that the country will need to import 150,000 MT of grain during the 2009/10 marketing year (FAO/WFP).

### Food Availability
- According to the March 2010 NEWU report, the country’s aggregate coarse grain production (white maize, pearl millet, wheat and sorghum) is provisionally forecasted at 134,713 tonnes. This represents an increase in output of over 10 percent above average and nearly 25 percent higher compared to 2008/09 poor harvest.

### Food Access/Prices
- Most households interviewed during the National Early Warning and Food Information System (NEWFIS) March 2010 agricultural inputs and household food security situation assessment indicated that they have depleted their harvest in September 2009 and are now dependent on the markets and/or government drought / flood relief foods to meet their food needs.
- Nationally, food price increases have stabilized; food inflation has declined from a high 16 % in Jan 09 and was down to 5.3% in January 2010. The rates are declining further as food prices drop internationally and in South Africa. By March, the food inflation rate stood at 4.1 percent.

### Nutrition, Health and Food Utilization
- The 2006 Demographic Health Survey (DHS) found that 29% of Namibia’s children were stunted, 17% were underweight and 7.5% were acutely malnourished.
- Approximately 77% of acutely malnourished children found in the north-eastern part of the country.
- The National Alliance for Improved Nutrition in Namibia has developed a concept note for a food consumption and micronutrient deficiency survey and plan to move forward with the design of the survey tools with technical assistance from GAIN and DSM.

### Comments
- Namibia is a net cereal importing country. A strong commercial sector assures good availability of staple cereals to cover effective demand. Vulnerable households’ needs are usually addressed through Government intervention programmes.
- April 2010 generally much wetter than normal in the northern parts of the country, with heavier falls at Katima Mulilo, Rundu, and Ondangwa.
- Southern parts of the country relatively dry, except around Keetmanshoop.
- Cumulative seasonal rainfall (October 2009 to April 2010) also fairly higher than normal in the northeast and central northern regions with Ruacana accumulating 823.4 mm, Katima Mulilo 788.5 mm, Mururani 713.4 mm, Nkurenkuru 682.0 mm, Rundu 650.3 mm and Ondangwa 520.3.
SOUTHERN AFRICA REGIONAL FOOD SECURITY UPDATE: SOUTH AFRICA

Updated – 21 May 2010

Highlights

- Projections for the current 2009/10 maize marketing season indicate that South Africa will have a surplus of 2,074 million tons of maize at the end of April 2010.
- The projected bumper maize harvest in South Africa has already begun to depress maize prices in South Africa to levels last seen in the 2005/06 marketing year.

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<td>• Projected commercial maize production has increased by 1.64% to 13.317 million MT from the 22 April 2010 forecast of 13.102 million MT.</td>
<td>• The estimates released on 20 May 2010 confirm the existence of a bumper commercial maize harvest in South Africa. The domestic supply/demand position indicates a surplus of over 4 million MT which can be made available for export to destinations within and outside of the region.</td>
<td>• Although South Africa’s food inflation is higher than that of most developed countries; the steady decline over since January 2009 has been maintained. In March food inflation rates were down to 1.3%; from 1.8% in February.</td>
<td>• The infant mortality rate was 49/1000 live births in 2009 (State of the World’s Children report, 2009). The main cause of under-five mortality is AIDS, representing 35% of all deaths in that age group.</td>
<td>• Government is partnering with agriculture and health institutions such as FAO, ARC, UNICEF, and other stakeholders to improve the existing food security initiatives e.g. Comprehensive Rural Development Programme (CRDP), community seed production schemes and nutrition interventions e.g. national vitamin A campaign.</td>
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<td>• This production is from an estimated area of 2,742 million ha, a figure that is 314,900 ha more than the 2008/09 final estimate of 2,427 million ha. Of this total area, white maize constitutes 1,720 million ha with a projected production of 7,999 million MT and yield of 4.66t/ha.</td>
<td>• Maize produced by the developing sector (mainly for substance) stands at 605,865 MT (up from 468,683 MT last season). The availability of this maize will delay the need to source maize from the markets for households in this sector.</td>
<td>• The projected bumper maize harvest in South Africa is depressing maize prices to levels last seen in the 2005/06 marketing year. The average spot price for white maize on SAFEX fell from R1150/MT in February to R1118/MT in March and to a low of R1103/MT at the end of April.</td>
<td>• UNICEF has supported Vitamin A campaign. Food stables fortification with vitamin A &amp; B, iron and Zinc. Vitamin A supplementation is provided in health facilities through doses targeting 90% of 6-11 months, 80% of 12-59 months and 90% postpartum women. 8,600 individuals living with HIV/AIDS are targeted with nutritional supplements.</td>
<td>• The electricity price hikes announced by Eskom are of big concern. So are the increases in minimum farm labourers wages and the fuel levy, that are expected to negatively affect the 2010/11 seasons.</td>
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<td>• The production forecast for sorghum is 267,693 MT, representing a 1.93% increase over the 262,633 MT of the previous forecast. Wet weather in April and May has slowed the harvesting process and is reducing the quality of the crop in some places.</td>
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<td>• According the estimates released on 6 May 2010, the final production estimate for the 2009 winter wheat stands at 1February forecast of 1,920 million MT.</td>
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SOUTHERN AFRICA REGIONAL FOOD SECURITY UPDATE: SWAZILAND

Updated – 19 May 2010

Highlights

• Harvesting of maize and cotton is ongoing but estimates are that the 2009/2010 season maize harvest has increased by 6% compared to 2008/2009.
• The VAC annual assessment data collection has been completed and data analysis started on 14th - 22nd May.
• The fuel price has increased for the second time within a period of one month

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<td>Farmers continue with maize and cotton harvesting. The projected Maize production has increased from 70,672 MT last year to 75,068 MT forecasted for the current marketing season (2010/2011). This can be attributed to an increase in the area planted; however the yield per hectare remained low and in some areas is lower than 2009/10 season. Swaziland gets all its maize imports from South Africa. The country imports a significant amount of yellow maize or the animal feed industry. Last season, a total of 51,000 MT was imported as against 24,000 MT of white maize. The remaining white maize import gap could have been covered through unrecorded maize meal imports by supermarket chains.</td>
<td>Food price increases have also come down, as experienced by other BLNS – with food inflation rates reduced from 1.88% in February 2010 to 1.11% in March. Maize grain prices range from E150.0 to 200.0 per 50 kg maize bag in rural markets while in urban markets it is E115.0 (NMC).</td>
<td>Malnutrition in young children (&lt;5 years) was most recently measured in the National Nutrition Survey which took place in 2008. Overall, only 1.1% of the children are wasted (low weight-for-height) and was slightly higher in rural areas compared to urban. Stunting or chronic malnutrition was found to be around 40 percent and was also slightly higher in children from rural areas. The Swazi VAC has collected nutrition data in the 2010 post-harvest assessment and findings will be made available in June.</td>
<td>The VAC annual assessment has been completed and data analysis is on-going. The Country launched it the 2011-2015 UNDAF and Complimentary Country Assessment. The country is currently undertaking the Multiple Indicator Cluster Survey (MICS) as part of monitoring progress of MDGs.</td>
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1 Botswana, Lesotho, Namibia, Swaziland
**SOUTHERN AFRICA REGIONAL FOOD SECURITY SITUATION UPDATE: ZAMBIA**

**Updated – 19 May 2010**

### Highlights
- The Zambia Vulnerability Assessment Committee is conducting flood impact assessment in areas affected by flood in 2009/10 rainy season and are currently undertaking a Comprehensive Vulnerability Assessment and Analysis (CVAA).
- A recent increase in fuel prices by up to 13 per cent by the Energy Regulation Board is likely to trigger price increases of food and non-food items.

#### Agriculture Situation
- The country is expected to experience another surplus harvest likely higher than the 1.9 MT last season although the 2009/10 production estimates are yet to be announced by Government.
- The costs of agricultural inputs is likely to go up due to recent increase in fuel prices and this may negatively affect timely distribution of inputs especially in remote areas.
- The Zambia Vulnerability Assessment Committee is conducting flood impact assessment in areas affected by floods during the 2009/10 rainy season.

#### Food Availability
- With the new crop marketing season (2010/11) entering the third week, the increase in the supply of maize on the market has not yet resulted in significant reduction in the prices of maize meal.
- FRA is negotiating with the Zimbabwean government over the possible export of the local excess maize in order to avoid distortion of fundamentals on the market such as the actual supply and demand for the new harvest.
- This is in response to the concern expressed by the Zambia Farmers Union and farmers on the need to export excess maize so that ZNFU participation on the local market is not affected.
- Since the start of the 2010/11 crop marketing season, the inflow of maize grain on the market has not been as high as because the moisture content of most of the maize remains above the normal

#### Food Access/Prices
- The Basic Needs Basket, the April cost of food for a family of six in Lusaka only marginally decreased from K901,500 in March to K901,250 in April, 2010 but the total basic needs basket increased from K2,771,930 in March to K2,778,680 in April.
- The annual inflation rate which is current at single digit (9.2%) is likely to slide back to double digit (9.2%) is likely to slide back to double digit with anticipated price increases of goods and services due to increase in fuel prices.
- The recent increase in fuel prices by up to 13 per cent by the Energy Regulation Board is likely to trigger price increases of food and non-food items and the worst hit will be the low income households in urban areas who are already struggling to meet their basic food needs.

#### Nutrition, Health and Food Utilization
- The Jesuit Centre for Theological Reflection, which is a respected research institution in Zambia, has attributed high levels of child malnutrition in rural areas to food insecurity triggered by recurrent floods whilst in urban areas, the high levels of child malnutrition is attributed to poverty compounded by high food prices affecting low income households.

#### Comments
- The Zambia Vulnerability Assessment Committee is undertaking a Comprehensive Vulnerability Assessment Survey in 21 districts of the North Western, Lusaka, Southern, Central, Eastern and Western provinces
- Despite the anticipated good crop this season there a possibility of pockets of food insecurity in the flood affected areas and the outcome of the VAC flood impact assessment will help inform the extent of crop damage and levels of food insecurity in those areas.
- The removal of fuel subsidy by Government is likely to result in continued upwards revision in fuel prices and this will subsequently result in upwards trends in price increases of goods and services.
## Highlights
- Prices of maize grain start to decline as the harvest season progresses.
- Year-on-year inflation increases even though food inflation has been declining.
- ZimVAC findings are due towards the middle of June.

### Agriculture Situation
- The 2010 2nd Round Crop and Livestock Assessment report has been released. The combined cereal production is estimated at 1,521,460 MT for 2009/2010, against a national cereal requirement of 1,991,000 MT, which gives a cereal deficit of about 469,540 MT. The 2009/2010 maize production is estimated at 1,327,572 MT from a planted area of 1,803,542 ha with an average yield of 0.7 t/ha.
- The production estimate is about 3 percent more than last year’s production estimate of about 1,242,586 MT.
- The government has however requested for a CFSAM.
- The report also indicates that calving rates are generally low; the average national calving rate is recorded at 32%. The optimum national calving rate should be above 65% percent.

### Food Availability
- The Crop and Livestock Assessment indicates that 29 rural districts did not produce enough to meet their rural population requirements assuming even distribution of cereals produced and using a per capita consumption of 133kg.
- The food security situation has generally improved with the current harvest though there are some areas which have deficit mainly in the Southern Provinces (Matabeleland South, Masvingo, parts of Midlands and Manicaland).
- The importation of both food and non-food commodities, has been favorable in most urban centres since January 2009 and this situation is expected to continue.

### Food Access/Prices
- Crop harvesting is underway in most rural areas and according to WFP’s Food Security Monitoring System, most communities (58%) were consuming cereal from own production in April 2010.
- As expected during harvest period, open market prices of maize grain have generally declined. Fortnightly price decreases have been in the range 17% to 25% since the beginning of April 2010.
- The prices of maize meal have however not started showing signs of decline. The commodity is still readily available on both urban and rural markets trading from US$0.44 to $0.88 per kilogram for unrefined brands. The highest prices are being recorded in Matabeleland North.
- The GMB is yet to announce the producer price for maize.

### Nutrition, Health and Food Utilization
- The challenge in water supplies to most major cities and towns continues and poses a significant threat to personal health and food utilisation. At any one point most residential areas in Harare are without water. Bulawayo (the second largest city) started water rationing on 12 April 2010.
- According to the 2009 MIMS report, 35% of children < 5 years are stunted (37% rural, 30% in urban areas); 2% are wasted; Underweight is 12% in rural areas and 9% in the urban.

### Comments
- The year-on-year inflation for the country rose from 3.5% in March 2010 to 4.8% in April 2010 according to the Central Statistical Office. However, the agency reported that food inflation was declining.
- Economic recovery has been slow with industrial capacity utilization improving slightly from 10% to around 30% since the introduction of multi-currencies in early 2009.
- The ZimVAC Rural Livelihoods Assessment is underway. It will be collecting information at household, community, and district level. Results of the assessment will determine areas of deficits within the districts and the extent of food insecurity at the household level. Results are expected at the end of June 2010.
Other Countries
Botswana (Updated May 6th)

The estimated total area planted for both Communal and Commercial sectors is **127 020 ha** which is **39%** of the **325 000 ha** cultivable land countrywide. The estimated total cereal production is **61 686 mt** which represents only **31%** of the **200 000 mt** that is the estimated national requirement for major cereals (sorghum, millet and maize). Cereal importation is still anticipated in the country to augment for the shortfall.

Areas in Kgalagadi North, Ghanzi, Palapye, Bobirwa, North East, Tonota and Nata which have reported poor to fair grazing, need to be reassessed by the end of May 2010 given the prevailing situation. High livestock population has been reported in Ngamiland and if not managed, it may result in overstocking and overgrazing in the district. Even though livestock condition and water availability have generally improved following the experienced rains, the rangelands have been affected by heat stress resulting in poor quality grasses in Bobirwa, Palapye, Nata, Tonota and Kgalagadi North. These imply that the prevailing conditions will not be able to sustain livestock until the next raining season, should the same conditions persist on these areas mention.

Acknowledgments

We are grateful to the respective country teams from the various Agencies in providing contributions to this report. Additional information is obtained from relevant websites as reflected in the main body of the report where applicable.

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