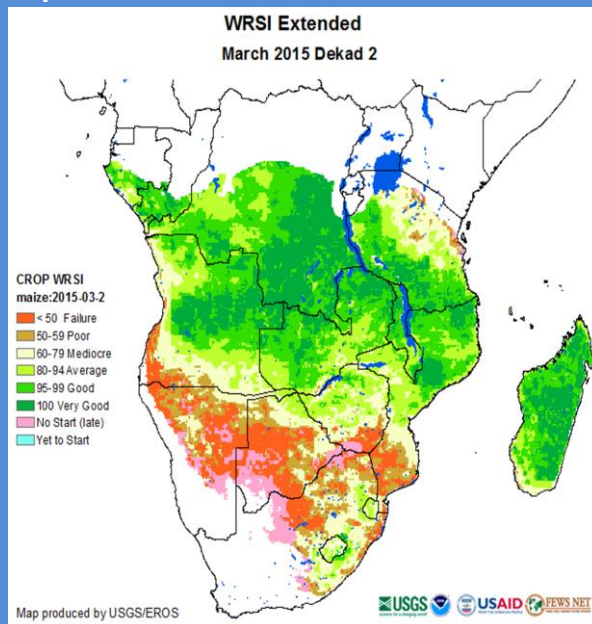


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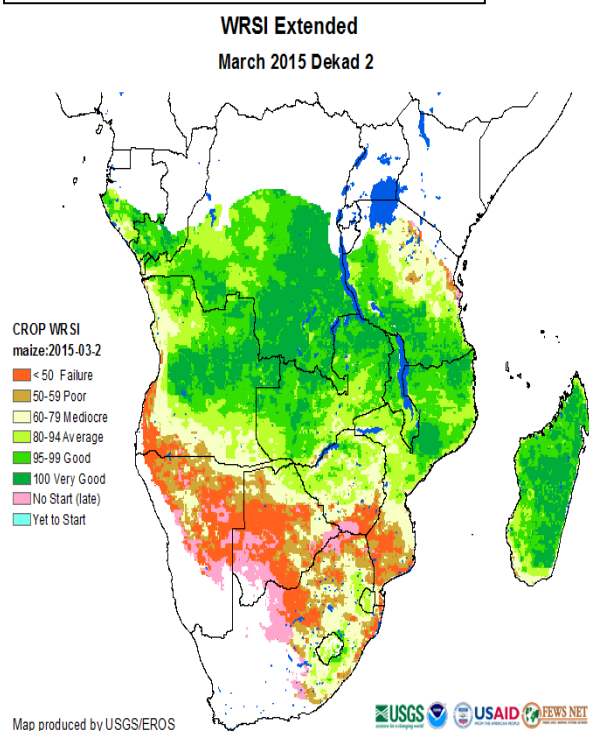


Regional Update

While favourable food security conditions prevail across most of southern Africa, early warning signs provide alarming indications of looming significant food supply shortages that are likely to impact on the next marketing season starting from July 2015. The single major determinant of the negative performance is the erratic and unusually uncharacteristic rainfall season that has just ended.

Despite a promising forecast by SARCOF in 2014, rains generally were late to arrive and irregular thereafter. Heavy rains were observed in early January leading to flooding particularly in Madagascar, Malawi and Mozambique, while prolonged dry spells affected the southern and eastern parts, including South Africa's maize belt. The figure 1 below shows the maize Water Ratio Satisfaction Index (WRSI) for the second dekad of March, providing clear indications through the yellowish, brownish and red colours of the percent water deficit experienced by the crop during this period. During this month there were very pronounced rainfall deficits across the region which resulted in crop under development and in some cases decrease of vegetation levels.

Figure 1. Maize WRSI March 2015



The rains experienced in late March and early April provided some relief to livestock farmers, but arrived too late for both staple food and cash crops. These adverse weather conditions are likely to reduce crop production in southern Angola, Namibia, Botswana, Zimbabwe, Lesotho, Malawi, Madagascar and South Africa.

South Africa, the largest producer in the region; accounting for more than 40% of regional maize output; has estimated a maize production fall of 33% on account of reduced yields raising serious concerns about the prospects of negative impact on food access through downstream dependant markets of the region in the upcoming 2015/16 consumption year. Additionally, there are concerns that the recent spate of xenophobic violence in South Africa will lead to a drop in remittance flows to other countries in the region, which could have an effect on food and nutrition security.

Production is also forecast to decrease significantly in Malawi, especially for cereals where imports may be required to fill the gap. In addition an estimated 616,000 people will require food assistance until mid-year as a result of the January floods. The impact of excessive rains was extensive to Malawi and Mozambique surplus northern and central areas where it affected market access through destruction of critical roads and displacement. While crop assessment is still on-going in Mozambique

it is likely that pockets of the affected surplus areas will experience reduced yields. Madagascar rice production yields are reported to be affected by prolonged waterlogging during critical stages of the crop development, adding to the impact of crop loss due to prolonged dry spells in the southern parts of the country.

In Zambia (the second biggest surplus country of the region) may only realize a small surplus, which may just be enough to cover domestic requirements and marginally cover the demand from neighbouring countries.

Of great concern is Zimbabwe, which is facing a looming huge food deficit due to imminent widespread crop failure: by February 2015 an estimated 23% of cultivated land was considered lost; and as dry spells have continued, more areas were affected, increasing the likelihood of a much bigger area loss, aggravated by further yield decrease.

Summary of Prevailing Nutrition Situation.

As reflected in table 1 below, unacceptably high rates of stunting persist in most countries indicating chronic poverty and food and nutrition security. All countries have stunting rates above 20%, the level deemed unacceptable by WHO. Five countries have very high stunting rates above 40% (DRC, Madagascar, Malawi, Mozambique and Zambia), while Swaziland and Zimbabwe have high rates ranging from 30% to 40%. Stunting has a negative impact on child growth and development, school performance and productivity. Likewise acute malnutrition is equally worrying with two countries (DRC and Comoros) recording alarming wasting rates of 10% and above, while nine countries are recording wasting rates ranging from 5% to 10% (Angola, Botswana, DRC, Mozambique, Namibia, Tanzania and Zambia).

Country	Wasting (2009-2013)	Stunting (2009-2013)	Underweight (2009-2013)	Overweight (2009-2013)
Angola	8.2	29.2	15.6	-
Botswana	7.2	31.4	11.2	11.2
Comoros	11.1	32.1	16.9	10.9
DR of Congo	8.5	43.5	24.2	4.9
Lesotho	3.9	39.0	13.5	7.3
Madagascar	15.2	49.2	36.8	-
Malawi	4.1	47.8	13.8	9.2
Mozambique	6.1	43.1	15.6	7.9
Namibia	7.5	29.6	17.5	4.6
South Africa	4.7	33.0	8.7	-
Swaziland	0.8	31.0	5.8	10.7
Tanzania	6.6	34.8	13.6	-
Zambia	5.6	45.8	14.9	8.4
Zimbabwe	3.1	32.3	10.1	5.8

Source: UNICEF, SOWC 2015

Preliminary Recommendations

Regional and national early warning and vulnerability assessment coordination institutions will continue to monitor the situation to detect early signs of food and nutrition security deterioration and advise accordingly. With a number of assessments completed, the FNSWG is calling for early release of results, not later than June so as to allow for timely and adequate planning of response going forward towards the upcoming 2015/16 marketing season.

Continued multi-sectoral effort should be strengthened to restore the livelihoods of those affected by floods, especially those who lost crops and livestock as well as other sources of income, including restoration of basic infra-structure to improve access.

Governments and the International community need to start considering the likelihood of increased food import demand into the region and the underlying need to support humanitarian cases. More importantly, there is urgency for concerted planning going forward towards the next agricultural season, enhancing market and livelihood based strategies and to strengthen farmer support systems and programmes for resilience building.

Country	Agricultural Season Status
Angola	Dry spells affecting Cunene Province while the rest of the country enjoyed good rains – tentatively 460,000 people affected.
Botswana	Planted area decreased by 36% from 382,190 ha during the 2013/14 cropping season to estimated 245,530 ha during 2014/15.
Lesotho	Good rains for livestock pasture. Assessment of crop performance still on-going
Madagascar	Waterlogging in rice producing areas reducing yields and widespread crop failure in the south due to dry spells
Malawi	Floods affecting productive and less productive districts combined with scattered dry spells – Crop estimates showing production decline of about 28% compared to last year
Mozambique	Concerns over flooded areas in cereal surplus regions of north and centre, while dry spells having minimal impact in the usually dry/ less (cereal) productive south.
Namibia	Satisfactory water availability for livestock but crops affected by widespread dry spells especially in Kunene region.
South Africa	Drought responsible for reduction of 32% of output compared to last year's bumper harvest. Not yet clear how much will be put in the market but a trickledown effect expected to affect downstream recipient markets of importing countries (i.e., Botswana, Lesotho, Mozambique, Namibia, Swaziland)
Tanzania	In bimodal areas and generally in the entire country surplus production expected but decreased levels compared to last year's bumper harvest.
Zambia	Initial assessments indicate that the maize harvest is likely to be much lower than the five-year levels due to the delayed start of season, below-average rainfall and dry spells over most parts of south-western and eastern Zambia.
Zimbabwe	Persistent dry spell and heavy rains combined contributed to widespread loss of cultivated land and negative expectations about prospects of harvest for this season.

COUNTRY ANALYSIS

Angola

Harvesting of the main 2015 cereal crops commenced in March. However, despite drought in the southern provinces (Cunene and part of Huila, Namibe, Cuando Cubango and Benguela) during the 1st production season, in the 2nd season rains have been near-average over most of the large crop-producing provinces. Cunene will be the exception because drought has prevailed and it is estimated that 460,000 people are affected, through crop losses or livestock deterioration and death. Food availability and price monitoring has indicated that the availability of preferred foods in some areas of Cunene is severely limited, while in areas of Huila province, food prices are very high.

Botswana

Planted area in Botswana has decreased by 36% from 382,190 ha during the 2013/14 cropping season to 245,530 ha during 2014/15. The decrease is attributed to the late onset of rains, insufficient rains followed by a dry spell – a trend that has continued throughout the rain-fed season. The lower planted area was also due to shortage of tractors and implements. Range resources assessment indicates fair grazing conditions. However, this will unlikely sustain livestock up to the next rainy season. Livestock water is also not satisfactory in most districts. Although there are no drought related mortalities, the decline in grazing conditions towards the winter season has raised concern over the likelihood of deterioration in animal health before the next rains. Drought assessment teams conducted an assessment between March and April 2015, the results of which are pending as the report is still being considered by the Rural Development Council (RDC).

Democratic Republic of Congo

Below average rainfall was experienced in the central and southern parts of the country from January to March 2015, while the northern parts of DRC experienced above average rainfall. This is likely to negatively affect food production and availability in the country. The situation has been exacerbated by armed conflict in eastern areas of the country.

Lesotho

The crop and food supply outlook for Lesotho is not very encouraging. This is largely due to inclement weather conditions. The agricultural season in Lesotho starts off around September and runs up to November. Most farmers start their planting upon the on-set of rains except for those in the mountain areas who do not have the luxury of waiting for rains due to the short growing season. For the 2014/15 agriculture season, rains did not come until November, which resulted in late planting for most farmers. The production outlook improved substantially between November and December due to receipt of good rains. However, the prospects for good harvests were dashed in January and February when the country experienced a long dry spell. This happened at the critical growth stage (tussling) of the maize crop, thus resulting in extensive crop failure. The good rains that resumed in March did little to reverse the damage on the maize crop. They have however been helpful in improving rangelands for livestock production.

The Disaster Management Authority undertook a preliminary assessment of the crop conditions in late February and found extensive crop damage across all the four agro-ecological zones. The agricultural division of the Bureau of Statistics is currently conducting a crop forecasting exercise, which will project the expected output from this year's agricultural production. This will be followed by the LVAC vulnerability assessment, which will give figures on the population that is likely to face food insecurity due to poor performance of agriculture. The IPC analysis is on the other hand is scheduled for July. While the production and vulnerability figures will only be available around June 2015, what is evidently clear is that Lesotho's food and nutrition security outlook is not good. Many people that depend on agriculture for their livelihoods will face serious hardships if response plans are not rolled out in time.

Madagascar

The two cyclones that hit western and south-western parts of the country between mid-January and mid-February 2015 caused flooding particularly over the central and southern parts of the country. The floods resulted in fatalities, destruction of infrastructure, displacement of people, and agricultural losses. The most affected areas include Antananarivo, Toliara and Morombe. Close to 10,000 hectares of rice fields were flooded. In some south-eastern areas, it is estimated that about 40% to 80% of crops were lost.

In addition, the southern region of Madagascar has been drastically impacted by drought - the worst experienced in six years. It is estimated that approximately 200,000 people require immediate food assistance nation-wide. The region of Androy is the worst affected. In local markets, staple food items have doubled in price. Overall food prices in the south of Madagascar have increased, on average, by 40%.

An in-depth food security assessment conducted by the Food Security and Livelihoods Cluster in February concluded that about 80% of the population surveyed in southern Madagascar is at least in moderate food insecurity. Of these, 50% are in severe food insecurity. The levels recorded are exceptionally high for this period.

Malawi

The spatial distribution of the rainfall has been poor with planting rains delayed for more than 1 month, followed by extremely heavy rainfall in January, leading to widespread flooding in the south and central regions. On the 15th of January, the Government declared a state of disaster in the 15 affected districts. The floods have devastated livestock and 63,976 ha of crops, affecting 1.14 million people, out of which 336,000 people have been displaced (half of them are still in temporary shelters). 106 people have been confirmed dead and 172 people are still missing. The country later experienced a deficit in rainfall from mid-February to March, particularly in Mwanza, Karonga, Mzimba, Rumphu, Chiradzulu and Chikwawa.

According to results of the recent flood affected joint food security assessment released in March, the number of flood victims who require food assistance between April and July has risen to an estimated

616,000. The ongoing MVAC market assessment in the flood affected areas will help inform what mode of assistance the food security response will adopt.

The national maize production from the crop weather model is estimated at 2,888,269 MTs as at 10 April 2015. This figure is 28% down from the first round model estimate of 4,012,363 MTs. Maize and other staple food production this season has been compromised by delayed onset, floods and excessive rains, prolonged dry spells and early cessation of rainfall. Maize prices remain lower than expected and this is attributed to the favourable maize supply situation as a result of the good harvest in the 2013/2014 agricultural season.

Mauritius

No reports of extreme weather events have been received so far. A significant proportion of food in Mauritius is supplied through imports. The food security is expected to remain stable in the coming consumption year.

Mozambique

After a delayed onset in October – December 2014, the heavy rains that started in early January 2015 in the central and northern Provinces, particularly in Nampula, Zambezia and Sofala, caused severe flooding resulting in displacement of households and damage to infrastructure (including power and water supply systems), farms and houses. Reports indicate that about 93,000 hectares of crops were completely destroyed by floods (61,979 ha of crops were lost in Zambezia province alone; to be checked as other sources from early April – eg Oxfam sit rep - said 139,148 ha have been affected by floods, including 102,593ha in Zambezia). The northern and central parts of the country received above average rainfall in February. In contrast, the southern parts of the country received below average rainfall, with most areas getting less than half the normal rainfall. In early March substantial rainfall along the coast of Nampula Province caused the additional destruction of thousands of houses and infrastructure including bridges, roads, and schools.

Overall, based on remote sensing estimates, the water requirement satisfaction index (WRSI) for maize suggests that the bulk of the northern region and much of the central region will expect good crop conditions, while much of the southern region will have below-average crop conditions. In areas affected by flooding, disruption to trade flows could result in reduced market supplies exerting upward pressure on food prices, particularly in the most affected southern districts.

Namibia

The rainfall performance has been extremely poor throughout the country since the start of the 2014/2015 rainfall season in October 2014. In January and February abnormally frequent and prolonged dry spells were experienced in most parts of the country. The Kunene region has been experiencing serious drought conditions for the past four consecutive seasons with the current season

reported to be the worst. The national crop production is provisionally estimated to be 33% below the 5-year average and nearly 30% lower than last season. In terms of livestock, poor grazing conditions have been widely reported in various parts of the country, except the north east where grazing conditions are better. Water availability for livestock is reported to be satisfactory in most parts of the country (through boreholes and pipeline), but poor in most parts of the north central regions which are dependent on surface and rainfall water for livestock.

Seychelles

Heavy rains were recorded in Praslin Islands located in the north-eastern parts of the country during the first week of January 2015. The area recorded a total of over 1,800 mm of rain in just over the first four days of January. This caused flooding especially in the low lying areas of the Island. Most of the rice consumed in the country is imported, as the country neither produces rice nor grains. The food security situation therefore is expected to be stable as any shortfall will be met by food imports.

South Africa

The country's main maize production areas (Limpopo, North West Province and Free State, Western and Northern Cape provinces) have been heavily affected by the February dry spell. South Africa's first maize production forecast estimates the 2015 harvest to be the worst in 8 years. The expected commercial maize crop for 2015 is estimated at 9.665 million tonnes, which is about 32% less than last year and 21% below the average maize production for the last 5 years. This expected decline has led to an overall food price increases of 6.4% in South Africa and to even higher increases on the main staple crop, maize (27% for white maize). In addition to maize, production of sunflower and sorghum have also been negatively affected.

The reduced maize production in South Africa will impact maize markets regionally by pushing up prices, especially in countries that heavily depend on maize imports from South Africa to meet their domestic shortfalls. The countries most exposed to such increases include Lesotho, Botswana, Namibia, Zimbabwe and Mozambique (southern parts). These countries may need to source their supplies from other sources both within and outside the region. South Africa may also need to import maize to stabilize national supplies.

Swaziland

The prolonged dry spells in January and a heat wave in February adversely affected crop development especially in parts of the Lowveld and Lubombo regions in the eastern parts of the country. Some parts of the country are experiencing crop failure due to poor rainfall distribution and low water tables. As a result, the Government has released a national appeal for assistance. An estimated 83,600 people are expected to be affected. Of the 51,500 ha of maize planted, it is projected that 40% will be lost. As Swaziland imports over 20% of its maize requirement from South Africa, the reduced maize production and higher prices in South Africa this year is therefore a serious concern.

Tanzania

Based on the agro-meteorological observations and field crop performance analysis, the 2014/15 agricultural season food crop production is expected to be fair in most unimodal rainfall areas but poor in bimodal areas. Food shortages therefore are likely to be experienced in the bimodal areas during the 2015/16 marketing year. In general, crop production is expected to decrease compared to the 2013/14 agricultural season which will result in a decrease in food availability during the 2015/16 marketing year. The main reason for the drop in production this season is the poor performance of the short rains (vuli).

However, despite the drop in crop production, the country is still expected to record a food surplus, partly due to large quantities of carry-over stocks from the 2014/15 marketing year. The challenge for Tanzania has been to find markets to sell the surplus maize. The next food security assessment could be in August/September, pending Government funding. Prior to the announcement by Tanzania Meteorological Agency (TMA), the Ministry of Agriculture had already indicated that a number of Districts in the central (Dodoma) region would face food shortages this year, possibly also affecting 3 Districts in the Lake Zone area, depending on the rainfall during the current rainy season April-June.

Zambia

Although The Crop Forecast Survey analysis is underway, initial assessments indicate that the maize harvest is likely to be much lower than the five-year levels due to the delayed start of season, below-average rainfall and dry spells over most parts of south-western and eastern Zambia. Although the current April rainfall is beneficial to pasture regeneration and water tables, they are too late to provide relief for late planted crops which are reaching permanent wilting point. The Zambia Ministry of Agriculture conducted a crop assessment in early April and the report is expected mid-May. The Ministry of Agriculture has indicated that the decision to export part of its previous year's record harvest will depend on the crop forecast and in-depth assessments.

Zimbabwe

Zimbabwe is facing a potential huge food deficit due to the widespread poor performance of 2014/15 agricultural season. The country experienced a delayed onset of the rainfall season. Planting rains were received in December instead of the normal early to mid-November. Heavy rains also caused flooding in Mbire and Muzarabani districts of Mashonaland, Central province and parts of Hurungwe district in Mashonaland West province. This was followed by extended dry spells from mid-January through March especially in Matabeleland South (Beitbridge, Gwanda, Matobo and Mangwe), parts of Matabeleland North, parts of Midlands and parts of Manicaland province. Maize, which remains the major crop grown by most households, was particularly affected. Government has acknowledged that more than 300,000 ha of crop will be lost due to mid-season dry spells. The country is therefore likely to face a domestic food shortfall which will have to be addressed through imports. The Ministry of Finance is already mobilizing resources to respond to the potential food crisis.

The first round crop and livestock assessment report carried out in February 2015 (but not officially released) estimated that 23% of cultivated areas are likely to be lost which seems to have been overtaken by recent developments as there are fears that possibly around 50% (or more) of the

cultivated area might be lost to prolonged dry spells. The 2015 ZimVAC Rural Assessment that is meant to start in early May will assess the food insecurity situation and provide Government and stakeholders with evidence of the severity of the problem. Most poor households have exhausted cereals from the previous harvest and are relying mainly on market purchases. Maize grain prices in the drought prone southern parts of the country are projected to be higher than last year due to limited production, implying reduced household purchasing power. FEWS NET is estimating additional entire districts like Beitbridge, Gwanda and Matobo to be written off based on recent field visits.

Casual labour opportunities are very limited due to poor production affecting agriculture related labor; harvesting for instance is expected to drop by more than 40%. Furthermore, because of the economic tightening in South Africa and the weakening of the rand, remittances from this country were projected to decrease by more than 35% (March 2015). The ongoing xenophobic violence in Durban and in Johannesburg targeting foreign nationals, among which a substantial number of Zimbabweans, will most likely push this trend downwards.

In March, observed drought conditions especially in southern areas stimulated significant price increases in maize grain (current prices have gone 22% above 5-year average). In Gwanda, Beitbridge and Mangwe, maize prices increased by 44% compared to February 2015. The food security situation in Matebeleland South is particularly alarming. According to the Zimbabwe Farmers Union, 75% of all the crops there have been written off; reduced availability of pasture and the drying of open water sources and lowering of the water table in most of the boreholes is of utmost concern. Irrigation schemes were also affected due to poor rains received. Some farmers have already begun distress sales of livestock to avert losses.

The Food Security Update is jointly produced by the Food Security and Nutrition Working Group – Southern Africa. The overall mission of the Group is to contribute to enhanced programming for improved Food Security, Nutrition and Livelihoods in southern Africa.

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