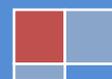


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A. REGIONAL UPDATE

Regional crop production, especially for cereal is expected to decrease as a result of the uncharacteristic and erratic 2014/15 rainfall season that reduced the productive capacity of affected populations. While in some countries crop production was mainly affected by prolonged dry spells (Botswana, Lesotho, Namibia, the maize belt of South Africa, southern Angola and Southern Zimbabwe), others felt the negative impact of both floods and prolonged dry spells (Madagascar, Malawi and Mozambique). Significant decreases are expected in southern parts of Zimbabwe, Malawi, Madagascar, Lesotho and South Africa.

Production figures for all cereals are being compiled and will be reflected in the next update. Meanwhile, Table 1 shows the 2015 **maize** production estimates, the staple food in the region, in comparison with the 2014 and five-year (2010 to 2014) average production figures. All the countries that have submitted data have registered a maize production decline in comparison with the five-year average except for Swaziland and Tanzania. The largest maize production fall was recorded in Zimbabwe (37 percent), Namibia (39 percent), South Africa (22 percent) and Malawi (22 percent).

Table 1 : Performance Forecast of the 2014/2015 Maize Production ('000 MT)				
Country	% Year Average 2010-14	Crop Forecasts 2015	2015 vs 2014	2015 vs 5 year average
Botswana	22	15	-57%	-33%
Lesotho	83	78	-9%	-6.3%
Malawi	3,711	2,876	-28%	-22.5%
Namibia	73.4	44.5	-34%	-39%
South Africa	12,723	9,840	-31%	-22%
Swaziland	83.6	93	-7%	12%
Tanzania	5,318	9,828	46%	84%
Zambia	2,910	2,618	-22%	-10%
Zimbabwe	1,200	752	-48%	-37%
SADC	26,115.22	26,145	-13%	-0.1%
Source : SADC NEWUs & National Crop Forecasts				

Maize decline in **South Africa** (largest maize supplier for the region) poses a serious cause for concern as it might trigger higher food prices in the short term in the deficit markets in surrounding countries as grain is (apart from human consumption) a basic input for the production of red meat, poultry, eggs and milk.

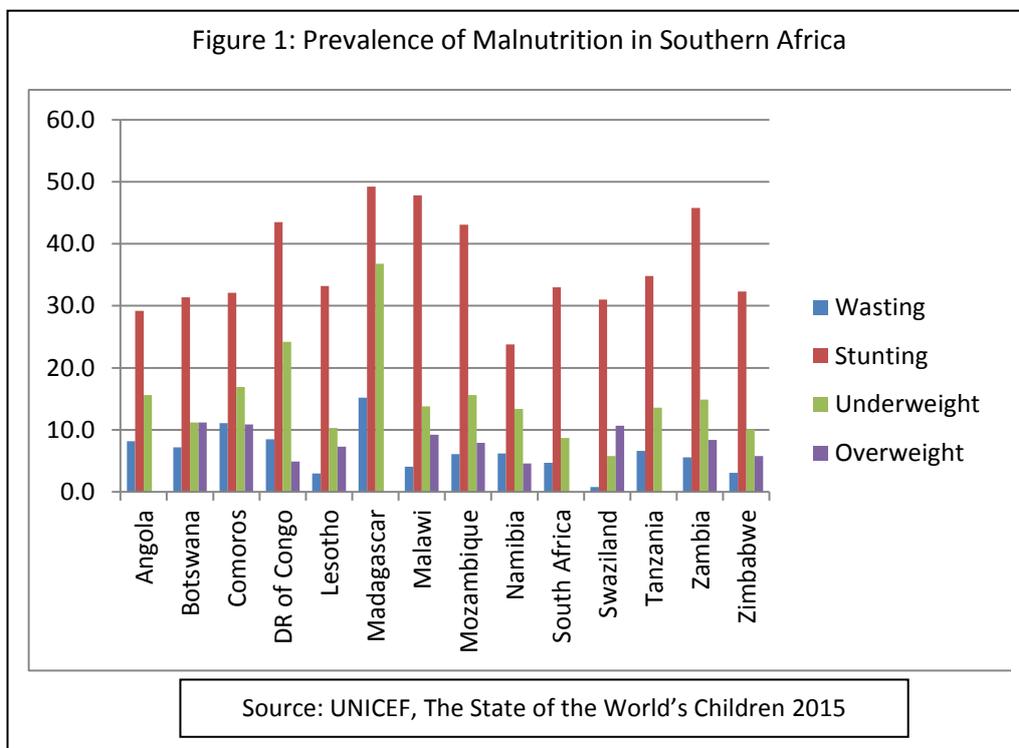
Zambia is the second biggest exportable maize producer in the region and for this season, may have produced just enough to cover domestic requirements and marginally cover the demand from neighbouring countries. This adds to the concerns about the likely increase in the regional market price for maize.

Despite the estimated below-average maize harvests across the region, regional cereal supplies are likely to remain stable from April to September due to significant carryover stock from 2014 particularly in South Africa and Zambia. Production in Zambia is estimated to have dropped by 22 percent below last year production and by 10 percent from the five-year average, but the country will still export a surplus of 876,000 metric tonnes (including carry-over stock). Grain SA, the largest representative of cereal crop farmers in South Africa, expects the country to have a surplus of at least 100,000 metric tonnes of white corn, which may not be enough to meet the needs of

neighbouring Botswana, Lesotho, Namibia and Swaziland until the next harvesting commences around May 2016.

Besides the negative cropping season, countries in the region may see their situation aggravated by lack of capacity to quickly import the right amount of maize to fill the gap. While it is still uncertain how vulnerable poor populations will adapt to the increased cost of the basic food basket in countries with relatively weak economies (Lesotho, Madagascar, Malawi and Zimbabwe), the current price trend gives indications that the lean season might start early in most countries.

Poor rains have also affected availability of water in some areas. This will affect livestock production in the upcoming months due to loss of grazing land and related animal diseases, particularly in the south of Zimbabwe, Angola, Botswana, Lesotho and Namibia. The prevalence of malnutrition points to unacceptably high rates of stunting indicating chronic poverty and food and nutrition security in the region. As shown in Figure 1, all countries have stunting rates above 20 percent, the level deemed unacceptable by the World Health Organization (WHO).



The decrease in crop and livestock production will likely increase the number of food insecure people in the 2015/16 consumption period. Results of national crop and food security vulnerability assessments, conducted between April and June 2015, will provide more details on the state of food insecurity and the number of vulnerable people requiring assistance.

B. KEY RECOMMENDATIONS

For SADC Member States

- There is urgency for concerted planning going forward under Government leadership in preparation for the next agricultural season, enhancing market and livelihood-based strategies and to strengthen farmer support systems and programmes for resilience-building including social protection programmes and promotion of climate smart agriculture by intensifying implementation of policies and strategies such as smallholder irrigation technologies, water harvesting technologies, and conservation agriculture, including use of short maturing varieties and drought tolerant crops.
- For effective and evidence-based decisions to inform policies and programming, Member States should consider using the Integrated Food Security Phase Classification (IPC) that classifies food security information into meaningful categories for decision support.
- The changing weather patterns are making rain fed agriculture less predictable. It is therefore critical that Governments focus on promoting agricultural solutions that are adaptable to the changing climate and improving household ability to generate income from climate-smart agriculture and other less climate sensitive strategies.
- Member States should scale up and prioritize the implementation of nutrition policies, strategies and programmes including related social sector, agricultural and other policies.
- Member States should create an enabling environment to promote engagement in agriculture and livestock activities beyond traditional cereals and in doing so, promote improved diet quality for example, consumption of indigenous and non-cereal crops, fish and livestock products.
- To optimise nutrient intake and utilisation of food thus improve overall nutritional status, Member States should:
 - Expand social behaviour change communication activities with a focus on nutrition education, improving hygiene practices (including food safety) and promoting dietary diversification.
 - Improve access to safe, clean water for drinking, food preparation and general use.
 - Improve sanitation facilities.
 - Promote malaria control, primary health care and intensive immunisation programmes.

For Partners

- Given the increased need for imports and poor flows from surplus producing areas to deficit areas, availability of food is an issue and partners should support governments to strengthen the monitoring systems for food availability and prices at local level.
- Poor subsistence farmers are already struggling to access food on markets, partners should therefore be considering interventions to increase household purchasing power (e.g.: Cash Transfer) during the lean season.
- Monitor sales and the health status of livestock as sales of livestock represent a good indicator of the types of coping mechanisms being used.

Cross-cutting

- Member States and Partners should strengthen multi-sectorial effort to restore the livelihoods of flood-affected people, especially those who lost crops and livestock and other sources of income, including restoration of basic infrastructure to improve access to food commodities.
- Member States and Partners should consider livestock support now before livestock

conditions start to deteriorate in a couple of months when water sources dry out, in adherence to FAO's Livestock Emergency Guidelines and Standards (LEGS).

- Member States and Partners should invest in food safety and processing to enhance market value and intra-regional trade of agricultural products including fisheries.

Country	Highlights
Angola	Early GIEWS forecasts indicate a cereal production level of about 1.55 million metric tonnes, 29 percent above average but 15 percent less than the bumper 2014 crop, thus reducing availability and uncharacteristically pushing up food prices in most southern markets in the country.
Botswana	36 percent decrease in area planted for all crops
DRC	Persistent food insecurity with an estimated 6.5 million people under crisis and emergency situation till end June 2015.
Lesotho	According to the Disaster Management Authority preliminary assessment of the crop conditions, planted land area in the country has dropped by 19 percent compared to last season. Increases in food prices, declining incomes, and the end of some safety-net programs will result in the deterioration of food insecurity outcomes for poor households to Stressed (IPC Phase 2) between August and September.
Madagascar	Approximately 579,000 people are experiencing severe food insecurity in seven districts in southern areas, according to the results of the food security cluster assessment of the impact of dry spells on food security and livelihoods.
Malawi	Maize production shortfall of 123,340 metric tonnes. MVAC assessment taking place in June
Mozambique	Stressed acute food insecurity (IPC Phase 2) is expected through September among selected very poor and poor households in the flood-affected areas.
Namibia	Cereal crop production is provisionally estimated at 88,900 metric tonnes, 33 percent below average and nearly 30 percent lower than last season
South Africa	Maize production decline has led to an overall food price increase of about 6.4 percent
Swaziland	Of the 51,500 ha of maize planted, it is projected that 40 percent will be lost. Domestic maize shortfall is projected at 114, 350 metric tonnes
Tanzania	Despite the drop in crop production, the country is still expected to record food surplus
Zambia	Preliminary findings from the Vulnerability Assessment Committee points to reduced production of maize in most of the districts (by as much as 38 percent).
Zimbabwe	Significant decreases in all cereal crop production compared to last year with maize indicated at 49 percent. Most southern parts of the country affected by severe drought.

C. COUNTRY ANALYSIS

Angola

Most of the country enjoyed good rains, however, the southern provinces (Cunene, part of Huila, Namibe, Cuando Cubango and Benguela), which normally contribute to about 10 percent of the national cereal output, were affected by drought. Early Global Information and Early Warning System (GIEWS) forecasts indicate a cereal production level of about 1.55 million metric tonnes, 29 percent above average but 15 percent less than the bumper 2014 crop, thus reducing availability and uncharacteristically pushing up food prices in most southern markets in the country. Higher than normal prices and reduced availability of subsidized cereals are contributing to decreased purchasing power among poor households, limiting the items that households can acquire in the market. As at May 2015, prices of maize meal have increased by 20 percent in Cunene when compared to the previous month (FEWS NET).

According to civil protection data there are approximately 700,000 people affected by food insecurity in Cunene, 460,000 in Huila, and 485,000 in Benguela. The food security situation will improve in June/July, however food stocks will be depleted by August/September 2015 and this will result in increasing levels of malnutrition of children Under 5. A high prevalence of acute malnutrition was observed during an integrated mission carried out in April by the Ministry of Health and World Vision in Cunene Province. About 17 percent of children screened during the mission have acute malnutrition which is very high and requires urgent intervention.

Botswana

Botswana has reported a 36 percent decrease in area planted for all crops; from 382,190 ha during the 2014/15 cropping season to 245,530 ha during 2013/14. The decrease is attributed to the late onset of rains, insufficient rains followed by a dry spell. The decline in area planted was also caused by a shortage of tractors.

Democratic Republic of Congo

Below average rainfall was experienced in the central and southern parts of the country from January to March 2015, while most parts of DRC experienced above average rainfall from March to May. This is likely to affect food production and availability in the country. The situation has been exacerbated by armed conflict in eastern areas of the country. DRC is currently in Emergency food insecurity (IPC Phase 4), particularly in Province Orientale, Equateur, South Kivu and Katanga. The rest of the country is under Stressed and Crisis conditions. An estimated 6.5 million people are under crisis and emergency situation till end June 2015.

Lesotho

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. The vulnerability figures will be confirmed following the on-going LVAC assessment. The IPC analysis is scheduled for July. While the production and vulnerability figures will only be available in July 2015, what is evidently clear is that Lesotho's food and nutrition security outlook is worrying. According to the Disaster Management Authority preliminary assessment of the crop conditions, planted land area in the country has dropped by 19 percent compared to last season. The most affected areas are Northern Lowlands, Foothills, Mountains, Southern lowlands and Senqu River valley. Many smallholder farmers who largely depend on agriculture for their livelihoods will face serious hardships if response plans are not rolled out in time.

Increases in food prices, declining incomes, and the end of some safety-net programs will result in the deterioration of food insecurity outcomes for poor households to Stressed (IPC Phase 2) between August and September.

Madagascar

The two cyclones that hit western and south-western parts of the country between mid-January and mid-February 2015 caused flooding over particularly 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 percent to 80 percent of crops were lost.

On a national level, the Ministry of Agriculture and Livestock estimates that staple food production will be below the five-year average by 9 percent for rice, 11 percent for maize, and 13 percent for cassava, although imports will likely fill in any gaps in rice needs and helping to maintain stable prices. Crop production losses are likely to lead to acute food insecurity in the south including Menabe, Ihorombe, Atsimo Andrefana, and Androy Regions, although the last two are the areas of greatest concern. Results of the food security cluster assessment of the impact of dry spells on food security and livelihoods conducted in seven districts in southern areas indicate that approximately 579,000 people are experiencing severe food insecurity.

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 regions of Androy and Anosy 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 percent.

Malawi

Crop production, compromised by delayed onset of rainfall, floods and excessive rains, prolonged dry spells and early cessation of rainfall is expected to drop by about 28 percent compared to last season. The estimated harvest is 2.8 million metric tonnes, with a production shortfall of 123,340 metric tonnes to meet the annual maize requirement for the country of 3 million metric tonnes. Maize production of is forecasted to reduce by 27.7 percent as compared to the 2013/14 season.

According to results of the joint food security assessment released in March, the estimated number of flood victims who require food assistance between April and July is 616,000. These flood-affected households are facing Stressed food security outcomes (IPC Phase 2) in the presence of humanitarian assistance for the first four months of the outlook period.

Between April and September, projected national average maize prices are projected to be about 35 percent higher than the three-year average. Localized cereal availability constraints are expected in the southern region.

Mozambique

The northern and central parts of the country received above average rainfall in February and good crop production prospects are expected. 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. Reports indicate that about 93,000 hectares of crops were completely destroyed by floods (139,148 ha have been affected by floods, including 102,593 ha in Zambezia).

Stressed acute food insecurity (IPC Phase 2) is expected through September among selected very poor and poor households in the flood-affected areas. The cessation of seasonal rains and notable decreases of all river levels will allow the affected households to resume to their typical livelihoods activities. However, a more targeted humanitarian assistance program is still supplying food, sanitation, water, health care services, and temporary shelter for those in need. Due to a delay in the harvest this season, the start of the seasonal price decrease for maize grain in a few markets is also delayed. In most monitored markets, the change of maize grain prices from February to March was typical and maize grain prices are stable or already decreasing. Localized cereal availability constraints are expected in the central provinces.

While the main harvest season continues, the majority of rural households are able to meet basic food needs and can afford non-food expenditures. These households are accessing food from their own production, and from market purchases through employment of their typical livelihood strategies. As maize grain from the 2014/15 harvest enters the marketing system, prices will continue to decrease in some areas through June, while in July and August prices are expected to increase. Currently maize prices are generally stable. Typical maize trade flows from the central region into the southern deficit areas are expected until September 2015.

Namibia

The national crop production is provisionally estimated at 88,900 metric tonnes, which is 33 percent below average and nearly 30 percent lower than last season. This is an indication that all the dry land crop producing regions (both commercial and communal) are expecting poor crop harvest. It was noted that, crop production under rain fed conditions recorded poor crop germinations especially those planted from mid-December to February this season.

The household food security situation continues to weaken as the current consumption period progresses. The last season's harvest is diminishing rapidly and is currently being supplemented with market purchases to prolong its availability. In terms of livestock, poor grazing conditions have been widely reported in various parts of the country, except the north east where good grazing conditions were reported. Water availability (surface rain water) for rainfall dependent livestock is also reported to be poor this season, as most swamps and earth dams did not receive significant inflow. The affected regions are mostly the north central regions that are heavily dependent on surface/rainfall water for livestock.

The Government of Namibia authorized the implementation of an interim drought relief as one of the measures to be undertaken to mitigate the impact of the drought. The interim measures are implemented while awaiting the results of the ongoing post-harvest Crop and Vulnerability assessment to determine the impacts of the drought on the Namibian communities and their livelihoods.

South Africa

Reports and climate data suggest that South Africa is experiencing its worst drought since 1992. 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 9.840 million tonnes, which is about 31 percent less than last year and 20 percent below the average maize production for the last five years. This decline has led to an overall food price increases of 6.4 percent in South Africa and to even higher increases on the main staple crop, maize (27 percent for white maize). In addition to maize, sunflower and sorghum have also been negatively affected.

The reduced maize production in South Africa could 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.

Swaziland

The prolonged dry spells in January and a heatwave 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 percent will be lost.

This marketing year's domestic maize shortfall is projected at 114,350 metric tonnes. The total cereal requirement for the 2015/2016 marketing year stands at 277,910 metric tonnes. Meanwhile, the total domestic cereal availability is 102,227.5 metric tonnes comprising of 93,773 metric tonnes (Maize 96,653 metric tonnes and Rice 120 metric tonnes) of forecasted gross harvest and 8,454.5 metric tonnes of opening stocks, implying that at least 175,682.5 metric tonnes of cereals (of which 70,539 metric tonnes is maize) have to be imported to meet the domestic requirement.

Livestock is in fairly good condition in the Lowveld and Upper Middleveld. However, both sites exhibit reduced level of water in earth dams. Some areas depend on streams and rivers for watering their livestock and the animals and have to travel considerable distances in order to get water.

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 by approximately 17 percent 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 food surplus, partly due to large quantities of carry-over stocks from the 2014/15 marketing year estimated around 0.42 metric tonnes.

Zambia

Harvesting of the 2015 cereal crops commenced in April. Food security conditions are generally stable. Preliminary findings from the Vulnerability Assessment Committee points to reduced production of maize in most of the districts (by as much as 38 percent) and that production from the 2014/2015 season stood at 1.3 million metric tonnes for the 48 districts, much lower than the five-year average, due to delayed and below-average rains together with dry spells over most parts of south-western and eastern parts of the country.

Acute food insecurity is expected to remain minimal (IPC Phase 1) in the April to June period as poorer rural households access the little harvest supplemented by limited labour sale. The households will also continue relying on staple food from the market through sale of small livestock extending the lean season as green harvest is relatively low in southern parts of the country. In

selected districts where crops wilted and green harvest failed, a small number of severely affected households (less than 20 percent) will be receiving limited relief staple food during the first part of the outlook period.

While maize and maize meal prices are expected to decline up to June as market supply increases with the new harvest, prices are likely to start increasing atypically early as a result of expected early increases in local market demand, high demand for Zambian maize from the region (given its surplus of 876,000 metric tonnes), and increased transport costs due to the recent fuel price increase.

Zimbabwe

Based on the 2014/15 second round crop estimates, national projected cereal production are approximately 39 percent lower than the five-year average. The country requires about 1.5 million metric tonnes of cereals (maize, sorghum, pearl and finger millet) for human consumption, and estimates production of about 808,829 metric tonnes in 2015. Maize production in 2015 is estimated at 742,225 metric tonnes, 49 percent deficit from the 2014 production of 1.4 million metric tonnes. Government plans to import 700,000 metric tonnes of white maize which would cost \$168,000 million. Based on these estimates, the country is expecting a 649,000 cereal deficit during the 2015/16 consumption year. Maize imports are forecast to nearly double; in anticipation of a tight domestic supply situation, the Government lifted the import ban earlier in the year, which was imposed in 2014.

Rural households in the south produced next to nothing this season, so they continue to rely on market purchases for their basic food needs and are currently Stressed (IPC Phase 2). In the absence of any assistance, households will likely be in Crisis (IPC Phase 3) from July through September. If assistance does not occur Emergency (IPC Phase 4) food security outcomes are expected between October 2015 and March 2016 in the southern region for the very poor households. Even in the presence of assistance, households would still be in Crisis (IPC Phase 3) and Stressed (IPC Phase 2) due to the above-average retail maize prices expected in the southern areas.

Most very poor households in the northern parts of the country will likely have normal supplies of cereal from own production through September. However, in the southern parts of the country, households will continue to rely on market purchases for cereals as such household food insecurity is expected to deteriorate from July through September. As more households in the north increase their reliance on market purchases later in the consumption period, prices are likely to increase atypically from July to September. Results of the 2015 Zimbabwe VAC assessment will provide government and stakeholders with evidence of the severity of the food and nutrition security problem.

D. Upcoming Events

Event	Date	Location	Contact Agency
SADC DRR Ministerial Meeting	22- 24 June	Harare, Zimbabwe	SADC RVAA
SADC RVAC Dissemination Meeting	21 – 24 July	Johannesburg, South Africa	SADC RVAA

Annex 1: Status of the 2015 Annual Assessments

Member State	Assessment Type	Period	Status
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DRC	EFSA & Market Assessment in Province Orientale	May/ June	
Lesotho	Annual VAA	June	Secondary literature review analysis was completed. Few gaps were identified and this should be complemented by field work.
Madagascar	CFSAM	June	
Malawi	Annual VA Assessment Market Assessment	June	Field work Ongoing
Mozambique	Annual VA Assessment	May/June	Data collection completed. Analysis and IPC reporting to follow.
Namibia	Annual VA Assessment		Field work commenced on 5 th May
Swaziland	CFSAM	May	Field work completed on 22 nd May. Report expected mid-June
Swaziland	Annual VA Assessment & Livelihoods Baseline Update	TBC	Pending funds
Zambia	Annual VA Assessment	May	Preliminary results presented in country on 02 nd June
Zimbabwe	Annual VA Assessment	May/June	Analysis under final preparation
Zimbabwe	Market Assessment	Mid-June	Under discussion

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