



Food Security Early Warning System

FOOD SECURITY UPDATE – JANUARY 2009

SADC Food Security Update - Issue 1

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REGIONAL SUMMARY

- ◆ **Seasonal rainfall performance has generally been good for most parts of the SADC region so far except for central and southern Mozambique, Lesotho, Tanzania and southern Madagascar where below average rains have been received.**
- ◆ **Problems of access to inputs have been experienced in a number of SADC countries, but more seriously in Lesotho and Zimbabwe. Prices of fertilisers have more than doubled in most countries during the current crop season compared to last season.**
- ◆ **Current assessment indicates that, as a result of good rains, areas planted to cereals may have increased in most countries, probably with the exception of Lesotho, Tanzania and South Africa. Below normal rains may have forced reduced area planted to cereals in Lesotho and Tanzania while low price of maize at world market is the reported reason for reduced area in South Africa.**
- ◆ **Qualitative forecasts, so far, indicate an increase in cereal production in 2009 in most Member States compared to 2008 except for Lesotho, Tanzania and South Africa. Preliminary forecast in South Africa indicate a 15% reduction in maize in 2009.**
- ◆ **The SADC cereal deficit for 2008/09 has been revised upwards from 1.01 million tonnes to 1.61 million tonnes (*Tables 1, 2 and 3*), mostly as a result of upward revision in requirements in South Africa. Food security remains precarious in Zimbabwe where the outbreak of cholera has further complicated the already poor food security situation in the country.**
- ◆ **Humanitarian food and non-food aid is still required in a number of Member States. The situation in Zimbabwe needs special attention as recent UN reports indicate that over 7.0 million people require such aid in the country.**

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ANGOLA: Crop production prospects look bright due to favourable rains ...

Current reports indicate good rains conducive to good crop development in most provinces this season, with above normal rains received in Bie, Moxico and Cuando Cubango provinces while normal rains have been reported in Huambo, Huila and Benguela provinces. The good rains have also favoured the growth of pasture for livestock. Localised flooding has been reported in some parts of south-eastern regions of the country, but little damage to crops or houses has been reported.

The food security situation has been relatively good as the country has managed to cover much of its cereal deficit assessed at 698,000 tonnes for 2008/09 marketing year. However, food prices have been high, which has negatively affected the food security situation of poor households especially in urban areas. Non-cereal food crops have covered part of the cereal deficit.

BOTSWANA: Favourable rains improve production prospects...

Cumulative rainfalls since the start of the season are above normal average especially in the northern and eastern parts of the country. Hence, current indications are for a better crop production compared to 37,000 tonnes harvested in 2008.

The overall food security situation remains satisfactory as a result of timely arrival of cereal imports. The country had imported about 80% (232,000 tonnes) of its planned cereal imports of 290,000 tonnes by the end of October, 2008. This amount of imports covers about 90% of the 2008/09 marketing year's cereal deficit of 253,000 tonnes. The remaining balance is expected to arrive before the end of the current marketing year in March 2009.

LESOTHO: Late onset and below normal rains and unaffordable inputs may negatively affect cereal production ...

Although no official cereal production forecasts have been made, early indications point to another poor cereal production for the 2008/09 cereal harvest. Reports indicate a reduction in area planted as a result of poor access to necessary agricultural inputs by smallholder farmers and the late onset of rains. In addition, northern and western districts, which are usually the most productive, have received below average rains which may further reduce crop yields as well as pasture for livestock. On the positive side, pilot fertiliser and seed input credit schemes have been implemented aimed at improving accessibility of inputs to small scale farmers.

The 2008/09 cereal balance sheet remains unchanged from earlier assessments that indicated a cereal shortfall of 215,000 tonnes. Vulnerability assessments have indicated that some 353,000 people require humanitarian food and non-food assistance during the 2008/09 marketing year as a result of poor harvest and rising food prices. The Government has taken some measures, such as suspending or reducing VAT and other taxes on food and providing cash transfers to vulnerable group, as a way to reduce the impact of soaring food prices.

MADAGASCAR: Poor rainfall and cyclone may negatively affect rice production in the southern regions ...

Satellite imagery indicate late onset of rains in southern parts of the country while normal rains were received in the plateau, highlands and east coast of the country. Damages to rice crop caused by Cyclone Fanele have been reported in some areas in the southern parts of the country. Rice production may be negatively affected by the poor rains as well as damages resulting from the cyclone.

MALAWI: Current assessment point to another good harvest in 2009, in spite of dry conditions experienced in December...

Overall rainfall performance so far has been good and if the rains continue to the end March 2009, a better cereal harvest is in prospect compared to the 2008 harvest. This is in spite of dry conditions that prevailed between mid-December 2008 and the first half of January 2009 especially in the Central and Northern regions. By the end of January, crop stages ranged from vegetative for the late planted crop to flowering and cob formation for the crop planted in mid-November 2008. Adverse effects on the current growing season include reported armyworm outbreaks in several districts and the substantial increase in prices of fertiliser. Localised floods have been reported in the Lower Shire Valley.

The cereal supply situation has remained satisfactory as a result of the assessed overall cereal surplus of 570,000 tonnes for 2008/09 marketing year. However, food access problems are now being felt by poor households especially in the Southern Region where production was poor and households have run out of own food stocks and depend on purchases as the prices are much higher than last year. The Government has been releasing part of its strategic grain reserves onto the market at a reduced price in order to keep the price down. Meanwhile, the Department of Disaster Management Affairs is providing humanitarian assistance to some households who have lost their houses due to recent floods and storms.

MAURITIUS: *Good rains received since October 2008...*

Well distributed rains have been received across the country so far since October 2008. By the end of January 2009, about 92% of long-term average rainfall had been received and the country has not experienced significant adverse weather conditions. Forecasts are for a good harvest of sugar and food crops this season compared to last season.

The 2008/09 cereal balance sheet indicates a deficit of 312,000 tonnes, which is expected to be covered through commercial imports.

MOZAMBIQUE: *In spite of late onset of rains, crop prospects look favourable so far ...*

Overall rainfall situation has been good although there was delayed onset in central and southern parts where, in addition, below normal rains have been experienced so far. The delayed onset in these areas led to late planting. However, current reports indicate that the maize crop is generally in good condition and in vegetative to flowering stages. As a result, better crop harvest is expected in 2009 compared to 2.28 million tonnes harvested in 2008. This is also partly due to timely availability and improved access to inputs by most farmers.

The food security situation has generally been good during the 2008/09 marketing year as a result of improved cereal harvest in 2008. However, localized food shortages have been experienced mostly in the areas affected by floods in 2008 such as Tete, Manica, Zambezia, Sofala, Inhambane and Gaza. Reports indicate that some 205,975 tonnes of maize have been imported from South Africa since May 2008 to cover deficits experienced in major cities and towns. In spite of this, however, food prices have more than doubled compared to same time last year in Maputo and other major towns.

Meanwhile, WFP reports that it will meet only 55% of total food requirement due to pipeline break down and this may result in cutting down on its food rations currently being distributed in a number of districts such as Machaze, Tambara and Changara.

NAMIBIA: *Moderate to heavy rains received in the main cereal producing areas ...*

Recent reports indicate moderate to heavy rains received in the northern, north-eastern and central parts of the country, while western and southern parts were drier, with only light rains received in some parts. North and north-eastern parts of the country including Katima Mulilo, Rundu, Gaikos and Ondangwa have reported floods due to the heavy rains. In general, a fairly good cereal harvest is expected in 2009.

The food security situation during the 2008/09 marketing year has been tight, with overall cereal deficit assessed at 133,000 tonnes. Reports indicate that the country has, so far, imported some 73,913 tonnes of maize from South Africa to cover part of the deficit; with the rest expected to be imported before the end of March 2009.

SOUTH AFRICA: *Preliminary estimates for 2009 harvest indicate a 15% reduction in maize production...*

Preliminary forecast from the National Crop Estimates Committee indicates a reduction in area planted to maize and sorghum in the commercial sector from 2.799 million hectares and 86,800 hectares in the 2007/08 cropping season to 2.596 million hectares and 86,600 hectares in 2008/09 respectively. As a result of these reductions in areas, current projections indicate a 15% reduction in maize from 13.16 million tonnes in 2008 to 11.25 million tonnes. Sorghum production is forecast to decrease by 4% from 295,600 tonnes to 283,100 tonnes. The current declining world food price for maize is cited as the main reason for the reduced planted area.

Revised food security assessment for the 2008/09 marketing year, incorporating final estimates of total cereal production for 2008 cropping season, indicate a reduced maize and sorghum surpluses from 3.52 million tonnes and 145,000 tonnes to 2.93 million tonnes and 72,000 tonnes respectively, while wheat deficit reduced to 930,000 tonnes from an earlier estimate of 991,000 tonnes. As a result of these changes, the overall cereal surplus for South Africa reduces from an earlier assessment of 2.20 million tonnes to 1.60 million tonnes. Report from the Directorate of Agricultural Statistics indicate that, between May 2008 and January 2009, some 2.53 million tonnes of maize had been exported mostly to the other SADC Member States of Botswana, Lesotho, Mozambique, Namibia and Zimbabwe.

SWAZILAND: *Improved cereal harvest expected for 2009 compared to 2008...*

The overall rainfall situation has been favourable for both crop and pasture development in the country and current expectations are for a better cereal harvest this year compared to 2008 when only 64,000 tonnes was harvested. In addition to favourable rains, the Ministry of Agriculture and Cooperatives had embarked on vigorous campaigns urging farmers for timely land preparation and planting during the current season. The Government has also implemented agricultural input support programmes. Current reports

indicate that animals are mostly in good condition.

The food security situation for the 2008/09 marketing year remains tight as a result of poor harvest in 2008, which caused a domestic cereal deficit of 96,000 tonnes, and soaring prices of food. Current reports indicate that the country has so far imported some 33,908 tonnes of maize from South Africa, which is about 81 per cent of the required import needs of 42,000 tonnes of maize.

TANZANIA: *Poor rains dampen prospects for a good harvest...*

Prolonged dry weather conditions from early December have affected bi-modal rainfall areas in the northern and north-eastern parts of the country, resulting in poor short-rain cereal harvest. Seasonal rains have started but with only light to moderate rains received so far. The poor performance of these rains has severely stressed crops in some parts of the country, where farmers have been forced to replant using short-term drought resistant crops. Unless the seasonal rains improve, current indications are for a lower food harvest in 2009 than the 5.62 million tonnes harvested in 2008. Planting of non-cereal food crops such as cassava and plantains should be encouraged in order to improve food production in 2009.

Although no report has been received from the National Early Warning Unit, indications are for a poor food security situation in bi-modal rainfall areas as a result of poor harvest from the short 'vuli' rains which normally contribute about 30 percent of the annual food production in those areas. Overall, however, the food security situation should be stable as a result of improved non-cereal food production in 2008 which covered cereal deficits countrywide.

ZAMBIA: *Harvest prospects look good due to good rains ...*

Favourable rains have generally been received in most parts of the country, leading to a good cereal harvest prospects in 2009. However, above normal rains received in southern and western parts of the country have caused some leaching of nutrients in the soil and caused damages to infrastructure, especially roads, thereby negatively affecting movement of agricultural produce and inputs. Production may also be negatively affected by late distribution of inputs to small scale farmers through the Government Fertiliser Support Programme (FSP).

The overall food security situation has remained stable as the country has been more or less self-sufficient in cereals during the current marketing year. However, the soaring prices has greatly reduced the ability of the poor to access food, which has led the Government through the Food Reserve Agency to release its strategic reserve stocks to the market at a reduced price. Humanitarian assistance continues to be required for some of the 444,624 people assessed vulnerable during the 2008/09 marketing year.

ZIMBABWE: *Current indication point to an improved harvest than in 2008...*

Overall rainfall performance has been good for summer crops and prospects are for a better crop harvest than the 836,000 tonnes harvested last season. Cereal harvest for 2009 is, however, still expected to be below domestic requirement of about 2.1 million tonnes. By the end of January, early planted maize was mostly between knee high and tasselling and reportedly in fair to good condition. The high cost of inputs, such as fertilisers, has greatly dampened expectation for even better cereal harvest this season. Inputs distributed by humanitarian community have not satisfied the huge requirement and in some instances distribution has been late for the current crops. Crop yields may also be affected by floods currently reported in Muzarabani and other low lying areas.

Current supply/demand assessments suggest critical food insecurity situation remains in the country due to poor cereal harvest in 2008, which resulted in an increasing cereal deficit from 974,000 tonnes during the 2007/08 marketing year to 1.23 million tonnes during the 2008/09 marketing year. Consequently, vulnerability assessments in May 2008 indicated that some 5.1 million people, from both urban and rural areas, require food and non-food humanitarian assistance during the 2008/09 marketing year. Recent reports, from the United Nations' Humanitarian Office, however, indicate that more than 7.0 million people require food and non-food assistance. The food security situation has been made worse by the fact that food items, among others, are now priced in foreign currency such as the US dollar and South African Rand, which are not easily accessible to most poor households. The outbreak of cholera has further complicated the already poor food security situation in the country.

**Table 1: SADC - SUMMARY
ANNUAL CEREAL BALANCE
MARKETING YEAR (Vary by Country) 2008/2009
Thousands of Metric Tons**

	Maize	Wheat	Rice	Millet/ Sorghum	All Cereals	Cassava
<u>A. Domestic Availability</u>	<u>25755</u>	<u>3174</u>	<u>1567</u>	<u>2330</u>	<u>32825</u>	<u>20463</u>
A.1 Opening Stocks	1787	710	414	127	3038	255
Formal/SGR	1616	699	403	98	2816	5
On Farm	135	1	8	26	170	250
Other	36	10	2	4	52	0
A.2 Gross Harvest	23967	2464	1153	2203	29787	20208
B. Gross Domestic Requirements	22325	4619	2444	2671	32059	12627
C. Desired SGR Carryover Stocks	1568	681	47	83	2379	241
<u>D. Domestic Shortfall/Surplus</u>	<u>1862</u>	<u>-2126</u>	<u>-924</u>	<u>-424</u>	<u>-1613</u>	<u>7595</u>
E. Commodity Cross Substitution	429	0	0	459	888	40
<u>F. Imports</u>	<u>1531</u>	<u>2275</u>	<u>339</u>	<u>11</u>	<u>4156</u>	<u>2</u>
F.1 Received	978	1317	38	9	2343	0
Commercial	966	1317	38	9	2331	0
Food Aid	12	0	0	0	12	0
F.2 Expected	553	958	301	2	1813	2
Commercial	548	944	295	2	1788	2
Food Aid	5	14	6	0	25	0
<u>G. Exports</u>	<u>2052</u>	<u>223</u>	<u>1</u>	<u>32</u>	<u>2307</u>	<u>30</u>
Committments Shipped	1383	0	0	0	1383	0
Committments Not Yet Shipped	669	223	1	32	924	30
<u>H. Import Gap</u>	<u>0</u>	<u>-74</u>	<u>-586</u>	<u>0</u>	<u>0</u>	<u>0</u>
<u>I. Forecasted Closing Stock</u>	<u>3338</u>	<u>607</u>	<u>0</u>	<u>96</u>	<u>3502</u>	<u>7848</u>
J. Current Stock	5009	40	0	163	5213	0

**Table 2: SADC
MAIZE BALANCE SHEET
MARKETING YEAR (Vary by Country) 2008/2009
Thousands of Metric Tons**

	Ang	Bot	Les	Mal	Mau	Moz	Nam	RSA	Swa	Tan	Zam	Zim	SADC
<u>A. Domestic Availability</u>	<u>670</u>	<u>18</u>	<u>73</u>	<u>2952</u>	<u>6</u>	<u>1774</u>	<u>88</u>	<u>14221</u>	<u>75</u>	<u>3626</u>	<u>1602</u>	<u>653</u>	<u>25758</u>
A.1 Opening Stocks	28	10	4	163	1	65	20	1057	11	32	390	6	1787
Formal/SGR	8	10	4	108	1	0	20	1057	10	2	390	6	1616
On Farm	20	0	0	30	0	65	0	0	0	20	0	0	135
Other	0	1	0	25	0	0	0	0	1	10	0	0	36
A.2 Gross Harvest	642	8	69	2789	2	1709	68	13164	64	3594	1212	647	23967
B. Gross Domestic Requirement	749	135	230	2353	86	1480	145	10158	115	3911	1318	1646	22325
C. Desired SGR Carryover Stock	10	10	12	30	0	50	10	1131	2	144	159	10	1568
<u>D. Domestic Shortfall/Surplus</u>	<u>-89</u>	<u>-126</u>	<u>-169</u>	<u>569</u>	<u>-83</u>	<u>244</u>	<u>-68</u>	<u>2932</u>	<u>-42</u>	<u>-429</u>	<u>125</u>	<u>-1003</u>	<u>1862</u>
E. Commodity Cross Substitutio	0	0	0	0	0	0	0	0	0	429	0	0	429
<u>F. Imports</u>	<u>127</u>	<u>135</u>	<u>118</u>	<u>100</u>	<u>12</u>	<u>206</u>	<u>74</u>	<u>0</u>	<u>34</u>	<u>45</u>	<u>10</u>	<u>669</u>	<u>1531</u>
F.1 Received	32	133	71	0	12	206	74	0	34	45	1	369	978
Commercial	20	133	71	0	12	206	74	0	34	45	1	369	966
Food Aid	12	0	0	0	0	0	0	0	0	0	0	0	12
F.2 Expected	95	2	47	100	0	0	0	0	0	0	9	300	553
Commercial	95	2	47	100	0	0	0	0	0	0	4	300	548
Food Aid	0	0	0	0	0	0	0	0	0	0	5	0	5
<u>G. Exports</u>	<u>0</u>	<u>1</u>	<u>0</u>	<u>101</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>1950</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>2052</u>
Committments Shipped	0	0	0	0	0	0	0	1382	0	0	0	0	1383
Committments Not Yet Ship	0	1	0	101	0	0	0	568	0	0	0	0	669
<u>H. Import Gap</u>	<u>0</u>	<u>0</u>	<u>-51</u>	<u>0</u>	<u>-71</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>-8</u>	<u>0</u>	<u>0</u>	<u>-334</u>	<u>0</u>
<u>I. Forecasted Closing Stock</u>	<u>48</u>	<u>18</u>	<u>0</u>	<u>599</u>	<u>0</u>	<u>500</u>	<u>16</u>	<u>2113</u>	<u>0</u>	<u>189</u>	<u>294</u>	<u>0</u>	<u>3341</u>
J. Current Stock	0	12	1	0	0	0	0	4996	0	0	0	0	5009

**Table 3: SADC
ALL CEREALS BALANCE SHEET
MARKETING YEAR (Vary by Country) 2008/2009
Thousands of Metric Tons**

	Ang	Bot	Les	Mal	Mau	Moz	Nam	RSA	Swa	Tan	Zam	Zim	SADC
<u>A. Domestic Availability</u>	<u>829</u>	<u>78</u>	<u>129</u>	<u>3144</u>	<u>6</u>	<u>2464</u>	<u>180</u>	<u>17508</u>	<u>82</u>	<u>5666</u>	<u>1891</u>	<u>848</u>	<u>32825</u>
A.1 Opening Stocks	73	41	41	167	4	180	59	1959	18	44	439	12	3038
Formal/SGR	53	40	41	109	4	90	59	1959	16	2	437	7	2816
On Farm	20	0	0	31	0	90	0	0	2	20	2	5	170
Other	0	1	0	28	0	0	0	0	1	22	0	0	52
A.2 Gross Harvest	756	37	88	2976	2	2284	121	15550	64	5621	1452	836	29787
B. Gross Domestic Requirements	1508	296	323	2544	308	2477	264	14173	172	6310	1620	2064	32059
C. Desired SGR Carryover Stocks	19	35	21	30	10	154	50	1735	6	144	159	16	2379
<u>D. Domestic Shortfall/Surplus</u>	<u>-698</u>	<u>-253</u>	<u>-215</u>	<u>570</u>	<u>-312</u>	<u>-167</u>	<u>-133</u>	<u>1600</u>	<u>-96</u>	<u>-788</u>	<u>112</u>	<u>-1232</u>	<u>-1613</u>
E. Commodity Cross Substitution	0	0	0	0	0	0	0	0	0	888	0	0	888
<u>F. Imports</u>	<u>762</u>	<u>290</u>	<u>213</u>	<u>141</u>	<u>233</u>	<u>206</u>	<u>123</u>	<u>1150</u>	<u>34</u>	<u>45</u>	<u>90</u>	<u>869</u>	<u>4156</u>
F.1 Received	32	232	78	0	117	206	74	1150	34	45	5	369	2343
Commercial	20	232	78	0	117	206	74	1150	34	45	5	369	2331
Food Aid	12	0	0	0	0	0	0	0	0	0	0	0	12
F.2 Expected	730	58	135	140	116	0	49	0	0	0	85	500	1813
Commercial	725	58	135	140	116	0	49	0	0	0	65	500	1788
Food Aid	5	0	0	0	0	0	0	0	0	0	20	0	25
<u>G. Exports</u>	<u>0</u>	<u>2</u>	<u>0</u>	<u>102</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>2204</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>2307</u>
Committments Shipped	0	0	0	0	0	0	0	1382	0	0	0	0	1383
Committments Not Yet Shippe	0	1	0	102	0	0	0	821	0	0	0	0	924
<u>H. Import Gap</u>	<u>0</u>	<u>0</u>	<u>-2</u>	<u>0</u>	<u>-79</u>	<u>0</u>	<u>-11</u>	<u>0</u>	<u>-62</u>	<u>0</u>	<u>0</u>	<u>-364</u>	<u>0</u>
<u>I. Forecasted Closing Stock</u>	<u>84</u>	<u>70</u>	<u>19</u>	<u>639</u>	<u>0</u>	<u>193</u>	<u>39</u>	<u>2281</u>	<u>0</u>	<u>290</u>	<u>360</u>	<u>0</u>	<u>3502</u>
J. Current Stock	0	59	38	0	0	0	0	5116	0	0	0	0	5213