



Food Security Early Warning System

FOOD SECURITY UPDATE – MAY/JUNE 2007

SADC Food Security Update No.2.07

Released: Gaborone, 15th June 2007

SADC REGIONAL SUMMARY

- ◆ **SADC cereal production increases marginally from 23.61 million tonnes to 23.69 million tonnes...** Latest information suggest a 2006/07 cereal production of 23.69 million tonnes, which is slightly higher than the 2005/06 harvest of 23.61 million tonnes. All Member States except Angola, Malawi, Mozambique and Tanzania indicate decrease in production compared to last year.
- ◆ **A SADC cereal deficit of 4.35 million tonnes is assessed for the 2007/08 marketing year...** Current assessments indicate a 2007/08 regional cereal deficit of 4.35 million tonnes compared to a deficit of 2.18 million tonnes during the 2006/07 marketing year. This large increase in cereal deficit is mostly due to reduced carry over stocks from 6.15 million tonnes in 2006/07 to 4.37 million tonnes in 2007/08 marketing year. Only Malawi is assessed with an overall cereal surplus during the 2007/08 marketing year (Table 1 & 3).
- ◆ **Maize deficit of 939,000 tonnes assessed ...** An overall maize deficit of 939,000 tonnes is assessed for the region during the 2007/08 marketing year which compares unfavourably to a deficit of only about 486,000 tonnes last year. Surplus maize is only assessed in Malawi (1.11 million tonnes), Mozambique (85,000 tonnes) and Zambia (38,000 tonnes) with the rest of the countries indicating deficits ranging from 35,000 tonnes in Mauritius to 860,000 tonnes in Zimbabwe (Table 2).
- ◆ **Overall deficits are also assessed for the other cereal commodities...** Current assessments also indicate regional deficits for wheat (-1.90 million tonnes), rice (-924,000 tonnes) and sorghum/millet (-586,000 tonnes).
- ◆ **Early indications from vulnerability assessments point to an increase in the number of people requiring humanitarian assistance during 2007/08 marketing year ...** Early indications from vulnerability assessments point to an increase in the number of people requiring humanitarian assistance in the region compared to the 3 million assessed in 2006/07. Zimbabwe, Lesotho and Swaziland are likely to require significant amounts of humanitarian assistance due to poor crop production. Results of current vulnerability assessments are expected in early July 2007.

ANGOLA: Food Security situation improves as cereal production rise 4% to 696,000 tonnes...

Latest forecasts indicate a 4% increase in total cereal production for the 2006/07 crop season to 696,000 tonnes from the 2005/06 season's harvest of 672,000 tonnes. This is mostly due to better rains in most parts of the country compared to last season but also

Contact: AGRICULTURAL INFORMATION MANAGEMENT SYSTEM (AIMS),
FANR DIRECTORATE, TEL: 267 3951863
SADC SECRETARIAT, FAX: 267 3972848
P/BAG 0095, E-mail: registry@ sadc.int
GABORONE, Website: www.sadc.int
BOTSWANA

due to improved access to farm inputs such as implements, seed and fertilizers by small holder farmers. Production of maize has increased by 4% while that of sorghum/millet has increased by 7% compared to last season. Productions of non-cereal crops such as cassava have also increased.

The food security situation is expected to improve during the 2007/08 marketing year compared to 2006/07 marketing year, as a result of a reduction in cereal deficit from 818,000 tonnes during the 2006/07 marketing year to 778,000 tonnes in 2007/08. Much of this deficit is expected to be covered through cross substitution by non-cereal food crops such as cassava.

BOTSWANA: Cereal production decline 20% below last year...

Revised production from the NEWU indicates a 20% decrease in cereal production from 36,000 tonnes last season to 28,000 tonnes this season as a result of poor rains this season. Production of maize alone sees a significant decrease of about 90% from 10,467 tonnes last season to only 998 tonnes this season. Productions of the more drought-tolerant sorghum/millet crops have, however, slightly increased by 9% from 26,000 tonnes to 28,000 tonnes.

The overall food supply/demand assessment indicate a cereal deficit of about 251,000 tonnes, which is lower than the 312,000 tonnes assessed in 2006/07 as a result of higher carry over stocks of 75,000 tonnes compared to 7,000 tonnes in 2006/07 marketing year. The 2007/08 food security situation is expected to remain satisfactory as current planned imports at 334,000 tonnes fully cover the assessed deficit.

LESOTHO: Cereal production goes down 38% compared to last season...

Current assessments indicate an overall cereal production of 78,000 tonnes, which is 38% below last year's harvest of 126,000 tonnes. Productions of maize and sorghum/millet have gone down from 103,000 tonnes and 18,000 tonnes in 2006 to 62,000 tonnes and 10,000 tonnes respectively. The country received erratic and poor rains during the season resulting in 80% reduction in the area planted and very poor crop yields.

Reflecting the poor crop production, the food security situation for the 2007/08 marketing year is expected to be worse-off with deficit assessed at 304,000 tonnes compared to 242,000 tonnes last year. The country has to budget for an increased importation of food during the 2007/08 marketing year to cover the increase in cereal deficit. FAO/WFP Crop and Food Supply Assessment Mission has verified the situation and donors are encouraged to provide humanitarian support to the country.

MALAWI: Current estimates indicate a 23% increase in cereal production ...

Revised estimate from the NEWU indicates the highest cereal harvests so far at 3.39 million tonnes, which is about 23 percent higher than last year's much improved harvest of 2.61 million tonnes. Production of all main cereal crops has gone up with maize production increasing from 2.61 million tonnes to 3.22 million tonnes; wheat increasing from 2,000 tonnes to about 3,000 tonnes; rice increasing from 59,000 tonnes to 72,000 tonnes and sorghum/millet increasing from 81,000 tonnes to 95,000 tonnes. The increased productions are due to a combination of good rainfall as well increased input availability to small scale farmers through the Government subsidy system.

Assessment of the cereal supply/demand for 2007/08 marketing year indicate an overall cereal surplus of 1.02 million tonnes. The surplus is entirely made up of maize which indicates a surplus of 1.11 million tonnes, while the other main cereals indicate deficits of 51,000 tonnes of wheat; 25,000 tonnes of rice and 14,000 tonnes of sorghum/millet. Consequently, the food security situation is expected to be largely stable during 2007/08 marketing year. The country is the only main source of maize imports within the region as all other Member States except Mozambique and Zambia are assessed with deficits. Already reports indicate the country has started exporting some 400,000 tonnes of maize to Zimbabwe.

MOZAMBIQUE: Cereal production increases by 2% from 2.10 million tonnes to 2.15 million tonnes...

An overall 2006/07 cereal harvest of 2.15 million tonnes is estimated, reflecting a 2% increase from the 2.10 million tonnes harvest last season. Production of maize is assessed at 1.56 million tonnes which is slightly above the 1.53 million tonnes harvested last season. Similarly, productions of rice and sorghum/millet have gone up slightly from 183,000 tonnes and 382,000 tonnes to 200,000 tonnes and 392,000 tonnes respectively. Prospects for a much better harvest were compromised by prolonged dry spell in the southern and central provinces leading to complete write-off of the first crop in the southern part of the country. Flooding in the north, and parts of central provinces also negatively affected crop production.

Current assessment indicate an overall cereal deficit of 320,000 tonnes for the 2007/08 marketing year since domestic cereal

availability of 2.33 million tonnes is insufficient to meet requirements estimated at 2.65 million tonnes. Assessments, though, indicate surplus maize (85,000 tonnes) and sorghum/millet (57,000 tonnes) with deficits assessed for wheat (-297,000 tonnes) and rice (-166,000 tonnes). Consequently, the food security situation is expected to be tight especially among smallholders farmers affected by dry spells, floods along the Zambezi basin and Cyclone Flavio that destroyed homes and crops in the districts of Vilanculos, Inhassorot, Govuro and Masinga.

Table 1: 2007/08 All Cereal Requirement, Demand and 2007 Production Estimates Compared to 2006 and 10-Year Average ('000 tonnes) as on 12th June 2007.

	2007/08		Production			10-year Average	
	Required* ('000 tons)	Available** ('000 tons)	2007 ('000 tons)	2006 ('000 tons)	2007 % change over 2006	Production ('000 tons)	2007 % change
Angola	1527	749	696	672	4	624	12
Botswana	354	104	29	36	-20	24	21
DR Congo	Na	Na	Na	Na	Na	Na	Na
Lesotho	416	111	78	126	-38	132	-41
Madagascar	Na	Na	Na	Na	Na	Na	Na
Malawi	2456	3475	3388	2754	23	2004	69
Mauritius	209	6	2	2	0	2	0
Mozambique	2648	2327	2147	2098	2	1727	24
Namibia	302	169	114	181	-37	114	0
South Africa	13995	12564	9017	9222	-2	11267	-20
Swaziland	178	59	47	67	-30	95	-51
Tanzania	6363	5673	5578	5189	8	4196	33
Zambia	1600	1587	1541	1597	-4	1166	32
Zimbabwe	2362	1240	1053	1597	-37	1682	-37
SADC	32411	28064	23691	23607	0	23033	1

Source: SADC FANR Directorate and Member States

* Includes requirements for SGR

** 2007 production plus carryover stocks.

NA – Data not available

NAMIBIA: Cereal production falls 37% to 114,000 tonnes...

Current NEWU estimates indicate a revised cereal production of 114,000 tonnes, which is 37% down on the 2006 total cereal harvest of 181,000 tonnes. Production of sorghum/millet - the main grain crop in the highly populated northern areas – is down 58% from 116,000 tonnes in 2005/06 season to 49,000 tonnes in 2006/07 season, while maize and wheat indicate slight increases from 51,500 tonnes and 12,900 tonnes to 52,100 tonnes and 13,500 tonnes respectively. The 2006/07 agricultural season has generally been poor, characterized by erratic start to the season, intermittent dry spells up to the month of February 2007 especially in some of the most populated regions of the country such as Kavango, Omusati, Ohangwena, Oshana and Oshikoto. On the other hand, floods affected eastern Caprivi.

The food security situation for the 2007/08 marketing year is expected to be tighter compared to 2006/07 given the increase in the overall cereal deficit from 92,000 tonnes to 133,000 tonnes. Deficits for maize and wheat are assessed at 89,000 tonnes and 49,000 tonnes respectively while a 5,000 tonnes surplus of sorghum/millet is assessed. The country is expected to cover the deficit through commercial imports.

SOUTH AFRICA: Fourth round forecast indicates a 2% drop in cereal production...

The National Crop Estimates Committee (Fourth Round) estimates a 2% reduction in the 2006/07 cereal production from 9.22 million tonnes in 2005/06 crop season to 9.02 million tonnes. Maize production is assessed to have increased by 5% from 6.94 million tonnes last season to 7.26 million tonnes. It should, however, be pointed out that the percentage increases in maize production over last season is more a sign of the poor production last year than a significant increase in expected production this season. The 2006/07 maize production is in fact 23% below the 5-year (2001/02-2005/06) average production of 9.40 million tonnes. Summer wheat is forecast at 1.60 million tonnes which is about 27% below last season while sorghum/millet production has increased from 96,000 tonnes last season to 152,000 tonnes. Dry weather condition has negatively affected cereal production.

Poor cereal harvest combined with low carry over stocks from the previous year has resulted in an assessed overall cereal deficit of 1.43 million tonnes. More significantly, the country is, for the first time in years, assessed with maize deficit currently estimated at 209,000 tonnes as total domestic availability of 9.19 million tonnes is insufficient to cover total requirement of 9.40 million tonnes (including strategic grain reserve of 914,000 tonnes). Current import plans stand at 982,000 tonnes of maize, which should be enough to cover the deficit and export commitments of about 918,000 tonnes.

SWAZILAND: Cereal deficit increase from 92,000 tonnes to 120,000 tonnes ...

Current production estimates for the 2006/07 harvest point to a much lower maize production of only 47,000 tonnes compared to another poor production of 67,000 tonnes achieved last season, and is 51% below the 10-year average production of recent seasons. Despite a promising start to the season, the 2006/07 rainfall season turned out to be one of the worst in years. Unusually dry spells were experienced especially from December and mid-January which adversely affected crops at their most critical development stage, resulting in widespread crop failure. The rains that came at the end of January and beginning of February were insufficient and too late to revive the crops. Production was further negatively affected by cyclone and hailstorm that destroyed the already weak crops as well as houses especially in Lowveld and Highveld regions.

The food security situation for the 2007/08 marketing year is expected to be much tighter than that of the 2006/07 marketing year given that the cereal deficit/import requirement has increased from 92,000 tonnes to 120,000 tonnes. Maize deficit is assessed at 64,000 tonnes, while deficits for wheat and rice are assessed at 43,000 tonnes and 12,000 tonnes respectively. The Government requested, and the FAO and WFP fielded, a Crop and Food Supply Assessment Mission (CFSAM) to verify the situation in May 2007 for possible appeal to donors for humanitarian and other assistance. The results of the Mission indicate an even lower maize production of 26,000 tonnes which, if adopted by Government, would mean an even higher cereal deficit of about 142,000 tonnes.

TANZANIA: Favourable crop production conditions result in 8% increase in cereal harvest...

Available estimates indicate an overall cereal production of 5.58 million tonnes, made up of 3.63 million tonnes of maize, 118,000 tonnes of wheat, 843,000 tonnes of rice and 991,000 tonnes of sorghum/millet. The overall cereal production is about 8% higher than the 5.19 million tonnes harvested last season. Productions of maize, wheat and sorghum/millet have all increased by 8%, while rice production has gone up 7%. The 2006/07 rainfall situation was generally been favourable for crops in both unimodal and bimodal rainfall areas.

Reflecting the improved cereal production, current assessment indicates an overall cereal deficit of 690,000 tonnes compared to 916,000 tonnes during the 2006/07 marketing year. All main cereal commodities indicate deficits except rice which indicates an exportable surplus of 182,000 tonnes. The good rains have also led to increased production of non-cereal crops such as cassava and plantains which are expected to cover deficits in cereal crops except wheat. As in all other Member States, the deficit in wheat has to be covered through imports as the commodity is not easily substituted by other commodities.

ZAMBIA: Poor early rains and floods lead to 4% decrease in cereal production ...

Current forecast indicates a slightly reduced 2006/07 cereal production of 1.54 million tonnes which is 4% down on the 2005/06 harvest of 1.60 million tonnes. Maize production at 1.37 million tonnes is 4% down on last season harvest of 1.42 million tonnes while sorghum/millet are down 15% to 59,000 tonnes. Production of wheat and rice are however up from 69,000 tonnes and 9,000 tonnes to 105,000 tonnes and 11,000 tonnes respectively. The country experienced a delayed onset of the rains followed by normal to above normal rains from late December on-wards. Above normal rains received in 21 of the 73 districts in the country led to floods which affected large areas of agricultural land especially along the Zambezi basin.

The food security situation is slightly worse-off in 2007/08 marketing year compared to last year given that current assessments indicate a domestic cereal shortfall of 13,000 tonnes compared to an overall cereal surplus of 19,000 tonnes during the 2006/07 marketing year. Supply/demand assessment for maize indicate a reduced surplus of 38,000 tonnes as compared to a surplus of 77,000 tonnes last year. Vulnerability assessments are currently being conducted in the country. The results from these assessments are expected to point out the extent of the food insecurity and other related problems in the country for the 2007/08 marketing year.

ZIMBABWE: Production estimates from CFSAM indicate a 37% drop in cereal production...

Production forecast from the FAO/WFP Crop and Food Supply Assessment Mission (CFSAM) indicate a 37% decrease in total cereal production to 1.05 million tonnes from 1.66 million tonnes harvested last season. Maize production alone has gone down 33% from another poor harvest of 1.20 million tonnes last season to 799,000 tonnes. Productions of wheat and sorghum/millet have also gone down from 135,000 tonnes and 328,000 tonnes last season to 128,000 tonnes and 126,000 tonnes respectively. Accounting

for the drop in cereal production are generally poor and erratic rains and shortages and/or high prices of farm inputs such as fertilizers, seed, fuel and draught power.

Due to reduced harvest, current supply/demand assessments suggest a deteriorating food security situation with cereal deficit increasing from 972,000 tonnes during 2006/07 marketing year to the current 1.12 million tonnes. The overall cereal deficit is composed of 860,000 tonnes of maize, 217,000 tonnes of wheat, 22,000 tonnes of rice and 23,000 tonnes of sorghum/millet. Current reports indicate that the Government has already started importing some 400,000 tonnes of maize from Malawi. The FAO/WFP Crop and Food Supply Assessment Mission estimate that 4.1 million severely affected people, both urban and rural, will require some 352,000 tonnes of cereals food assistance during the 2007/08 marketing year. The Zimbabwe Vulnerability Assessment Committee is currently in the field conducting its 2007 assessments. The results should be ready by the end of July 2007.

**Table 2: SADC
MAIZE BALANCE SHEET
MARKETING YEAR (Vary by Countr 2007/2008
Thousands of Metric Tons**

	Ang	Bot	Les	Mal	Mau	Moz	Nam	RSA	Swa	Tan	Zam	Zim	SADC
<u>A. Domestic Availability</u>	<u>570</u>	<u>12</u>	<u>65</u>	<u>3294</u>	<u>6</u>	<u>1620</u>	<u>67</u>	<u>9194</u>	<u>52</u>	<u>3685</u>	<u>1406</u>	<u>956</u>	<u>20928</u>
A.1 Opening Stocks	28	11	3	75	1	65	15	1930	6	59	40	157	2389
Formal/SGR	8	9	3	30	1	0	15	1930	5	6	40	154	2201
On Farm	20	0	0	45	0	65	0	0	0	30	0	0	160
Other	0	1	0	0	0	0	0	0	1	23	0	3	28
A.2 Gross Harvest	542	1	62	3219	2	1555	52	7264	47	3626	1366	799	18536
B. Gross Domestic Requirements	749	143	265	2123	38	1480	146	8489	115	3914	1313	1696	20472
C. Desired SGR Carryover Stocks	10	10	12	60	0	55	10	914	2	144	55	120	1392
<u>D. Domestic Shortfall/Surplus</u>	<u>-189</u>	<u>-141</u>	<u>-212</u>	<u>1110</u>	<u>-35</u>	<u>85</u>	<u>-89</u>	<u>-209</u>	<u>-64</u>	<u>-373</u>	<u>38</u>	<u>-860</u>	<u>-939</u>
E. Commodity Cross Substitution	0	0	0	0	0	0	0	0	0	458	0	0	458
<u>F. Imports</u>	<u>0</u>	<u>155</u>	<u>0</u>	<u>0</u>	<u>35</u>	<u>0</u>	<u>49</u>	<u>982</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>1221</u>
F.1 Received	0	155	0	0	30	0	0	0	0	0	0	0	185
Commercial	0	10	0	0	30	0	0	0	0	0	0	0	40
Food Aid	0	145	0	0	0	0	0	0	0	0	0	0	145
F.2 Expected	0	0	0	0	5	0	49	982	0	0	0	0	1036
Commercial	0	0	0	0	5	0	49	982	0	0	0	0	1036
Food Aid	0	0	0	0	0	0	0	0	0	0	0	0	0
<u>G. Exports</u>	<u>0</u>	<u>1</u>	<u>0</u>	<u>10</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>718</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>729</u>
Committments Shipped	0	0	0	0	0	0	0	0	0	0	0	0	0
Committments Not Yet Shipped	0	1	0	10	0	0	0	718	0	0	0	0	729
<u>H. Import Gap</u>	<u>-189</u>	<u>0</u>	<u>-212</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>-40</u>	<u>0</u>	<u>-64</u>	<u>0</u>	<u>0</u>	<u>-860</u>	<u>0</u>
<u>I. Forecasted Closing Stock</u>	<u>0</u>	<u>23</u>	<u>0</u>	<u>1160</u>	<u>0</u>	<u>140</u>	<u>0</u>	<u>969</u>	<u>0</u>	<u>229</u>	<u>93</u>	<u>0</u>	<u>1406</u>
J. Current Stock	0	11	0	0	0	0	0	0	0	0	0	154	165

**Table 3: SADC
ALL CEREALS BALANCE SHEET
MARKETING YEAR (Vary by Coun: 2007/2008
Thousands of Metric Tons**

	Ang	Bot	Les	Mal	Mau	Moz	Nam	RSA	Swa	Tan	Zam	Zim	SADC
<u>A. Domestic Availability</u>	<u>749</u>	<u>104</u>	<u>111</u>	<u>3475</u>	<u>6</u>	<u>2327</u>	<u>169</u>	<u>12564</u>	<u>59</u>	<u>5673</u>	<u>1587</u>	<u>1240</u>	<u>28064</u>
A.1 Opening Stocks	52	75	33	87	4	180	55	3547	13	95	46	187	4374
Formal/SGR	25	73	33	31	4	90	55	3547	10	6	40	177	4092
On Farm	27	0	0	46	0	90	0	0	2	31	6	5	207
Other	0	1	0	11	0	0	0	0	1	57	0	5	75
A.2 Gross Harvest	696	29	78	3388	2	2147	114	9017	47	5578	1541	1053	23691
B. Gross Domestic Requirements	1508	322	395	2396	199	2489	266	12477	172	6219	1545	2242	30231
C. Desired SGR Carryover Stocks	19	32	21	60	10	159	36	1518	6	144	55	120	2180
<u>D. Domestic Shortfall/Surplus</u>	<u>-778</u>	<u>-251</u>	<u>-304</u>	<u>1019</u>	<u>-203</u>	<u>-320</u>	<u>-133</u>	<u>-1431</u>	<u>-120</u>	<u>-690</u>	<u>-13</u>	<u>-1122</u>	<u>-4346</u>
E. Commodity Cross Substitution	0	0	786	0	0	786							
<u>F. Imports</u>	<u>0</u>	<u>334</u>	<u>0</u>	<u>1</u>	<u>193</u>	<u>0</u>	<u>89</u>	<u>1006</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>1624</u>
F.1 Received	0	334	0	0	160	0	0	0	0	0	0	0	495
Commercial	0	22	0	0	160	0	0	0	0	0	0	0	183
Food Aid	0	312	0	0	0	0	0	0	0	0	0	0	312
F.2 Expected	0	0	0	0	33	0	89	1006	0	0	0	0	1129
Commercial	0	0	0	0	33	0	89	1006	0	0	0	0	1129
Food Aid	0	0	0	0	0	0	0	0	0	0	0	0	0
<u>G. Exports</u>	<u>0</u>	<u>1</u>	<u>0</u>	<u>10</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>752</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>764</u>
Committments Shipped	0	0	0	0	0	0	0	0	0	0	0	0	0
Committments Not Yet Shippe	0	1	0	10	0	0	0	752	0	0	0	0	764
<u>H. Import Gap</u>	<u>-778</u>	<u>0</u>	<u>-304</u>	<u>0</u>	<u>-10</u>	<u>-320</u>	<u>-43</u>	<u>-1177</u>	<u>-120</u>	<u>0</u>	<u>-13</u>	<u>-1122</u>	<u>-2700</u>
<u>I. Forecasted Closing Stock</u>	<u>0</u>	<u>115</u>	<u>0</u>	<u>1070</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>341</u>	<u>0</u>	<u>240</u>	<u>42</u>	<u>0</u>	<u>0</u>
J. Current Stock	0	83	0	0	0	0	0	0	0	0	0	202	285