

Food Security Early Warning System

FOOD SECURITY UPDATE - OCTOBER 2011

SADC Food Security Update No.1

Released: Gaborone, 15th November 2011

SADC REGIONAL SUMMARY

- Assessments by the end of October 2011 indicated that the 2011/12 rainy season had not commenced in most parts of the region except for a few isolated areas. Planting rains are mostly expected in November in the Region.
- Latest rainfall forecasts indicate that most parts of the Region may receive normal to above normal rains during the period November 2011 to January 2012. Should this be realized and farmers are able to timely access inputs, the Region may have another good harvest in 2012.
- □ Final estimates indicate a 2011 SADC cereal production of 33.08million tonnes, which is 5% down on the 2010 production of 34.64 million tonnes. Maize and sorghum/millet production went down in 2011 compared to previous year while productions of wheat and rice went up.
- The 2011/12 demand/supply assessment indicate a Regional cereal deficit of about 0.95 million tonnes for the 2011/12 marketing year compared to a surplus of 0.73 million tonnes in 2009/2010. The deficit is mostly due to a reduction in maize surplus from 4.81 million tonnes in 2010/11 to 2.73 million tonnes in 2011/12 marketing year. This is mostly due to reduced cereal production especially in South Africa.
- ☐ Trend analysis shows a decreasing number of food insecure populations during the past seven years. However, the number remains high in spite of improved food production in the recent years, probably an indication of chronic food insecurity and high levels of poverty in the region.

1. EARLY OUTLOOK FOR THE 2011/2012 AGRICULTURAL SEASON

Update on rainfall forecast for 2011/12-Crop Season...

The fifteenth Southern Africa Regional Climate Outlook Forum (SARCOF) was held from 29 to 30 August 2011 in Windhoek, Namibia. Climate Experts reviewed the current state of the global climate system and its implication on rainfall in the SADC region. On the basis of the review, most of the SADC region was expected to receive largely normal to below-normal rainfall in the first half of the season, except in the northern areas and island states where normal to above

AGRICULTURAL INFORMATION MANAGEMENT SYSTEM (AIMS),

FANR DIRECTORATE, SADC SECRETARIAT, P/BAG 0095, GABORONE, BOTSWANA

Contact:

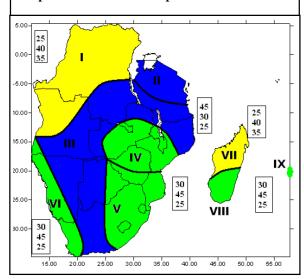
TEL: 267 3951863 FAX: 267 3972848 E-mail: registry@ sadc.int Website: www.sadc.int normal rains were expected.

However, a review of the forecast in October 2011 indicates that most of SADC Region is

expected to receive normal to above normal rainfall (Map1) during the November 2011 to January 2012 period. Areas in Sectors II and III have an enhanced chance of above-normal to normal rainfall while areas in Sectors IV, V, VI, VIII and IX have a higher chance of normal to above-normal rainfall. In contrast, Sectors 1 and VII which include northern Angola, much of DRC and northern Madagascar have increased chances of normal to below-normal rainfall.

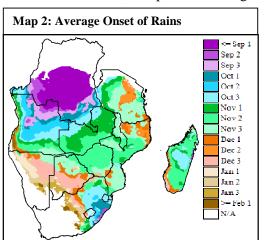
Rainfall Onset in the SADC Region for the 2011/12-Crop Season...

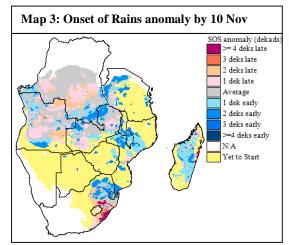
The average effective onset of rains occurs around November in most parts of the SADC



Map 1: Climate Forecast Update Nov-Dec-Jan

region (Map 2). In a few areas, particularly parts of South Africa, Lesotho, Angola and DRC, the season starts earlier, in September through October. Based on this normal picture, an analysis of





the start of season to date indicates that, as expected, most areas in the region have not yet received their planting rains (Map 3). November is an important month for season onset for most areas in the SADC region. In the southern parts of the region which expect rains earlier, particularly in Lesotho, and parts of eastern South Africa, the rainfall has been erratic, with a poor onset of rains. In some of these areas, the onset of rains has been delayed by at least 40 days. This implies that some areas may have a significantly shortened growing window if the rains end timely, at the end of the growing season.

Reports from Lesotho indicate that some areas had not yet planted by late October, and an analysis using rainfall estimates indicate that most areas in Lesotho received less than 30% of

their normal rainfall in the period between 1 September and 10 November 2011. Significant rains were received during the first ten days of November in several areas including much of Zambia, northern Mozambique, and southern Malawi, and could signify a substantive onset of rains if followed by significant rains in the ensuing weeks. Many parts of the region also experienced very high, above normal temperatures in October. High temperatures result in increases in evapotranspiration and can lead to crop moisture stress if not countered by a good water supply.

Agricultural Activities...

Preparations for the agricultural season have commenced in all SADC Member States. Reports also indicate problems of accessing agricultural inputs such as improved seeds and chemical fertilizers, due to several factors including the high cost of commercially available inputs and reduced amounts and delays in distribution of subsidized inputs. This situation may negatively affect crop yields and production. The following are highlights from some countries.

Lesotho: Crops are normally expected to be at an advanced stage by November. However, by mid-October, reports indicated that little agricultural activity was taking place in the country due to absence of rainfall. Analysis of rainfall in most parts indicates no rainfall or less than 30% of the normal rainfall had been received thereby hindering agricultural activities.

Malawi: The main agricultural activity was land preparation as well as the implementation of the Farm Input Subsidy Program (FSIP). The FSIP was reportedly hampered by the limited availability of fuel, which may negatively impact agricultural production. Pre-season rains were received in the first half of October, with dryness being experienced in the last 10 days of the month. Reports indicate that these pre-season rains improved water resources and soil moisture reserves, and triggered germination of pasture and regeneration of natural vegetation, thereby benefitting livestock. In some few areas, the rains were sufficient to allow farmers to plant, and in southern Malawi, some few planted crops were reported to be in good condition at early vegetative stage.

Mozambique: Under the Input Subsidy Programme some 1,393 tonnes of OPV maize seed, 848 tons of hybrid maize seed, 1,438 tonnes of rice seed, 730 tonnes of soya beans and 440 tonnes of sorghum have been distributed to farmers. These represent over 90% of the intended distribution program and have allowed farmers, in most cases, to access seed before the onset of rains. Some 5,000 vulnerable households were reported to have benefited from agricultural input fairs by the end of October. Planting was reported to have already started by October, as some areas in the southern and central parts of the country had received sufficient rains to start planting.

Tanzania: The earliest planted crops were reported to be in flowering stage, particularly beans, while maize was in the vegetative stage in bimodal rainfall areas. Some of these areas were affected by dry spell towards the end of October, but rainfall in the first ten days of November alleviated this. In the unimodal areas, the main activity was land preparation, although in a few areas, farmers were reported to have planted.

South Africa: Recent national reports on commercial farmers' intentions to plant indicate a potential 9.7% increase in area planted to maize, from 2.37 million hectares in 2010/11 to

2.60 million hectares in 2011/12. The report cites increases in commodity prices as the main driving factor for the planned increase in area. This will likely have a positive impact on the overall regional food availability, as South Africa normally accounts for more than 45% of maize produced in the Region.

Zimbabwe: The main activity was land preparation, which was reportedly hindered by suboptimal condition of draft oxen, constant breakdown of tractors for tillage and scarcity of their spares. Reports indicate that agricultural inputs are readily available on the market but high prices may hinder access by many farmers. Government and donors are implementing a Subsidized Input Support Programme which is supporting some poor farmers. Although dry planting has been reported in some areas, the rainfall season has not effectively started in most areas. Irrigated maize and tobacco are both reported to be at vegetative stage and in fair to good condition. Condition of livestock is reported to be ranging from poor to good, with communal areas negatively affected by inadequate water supplies especially in the dryer areas of the country.

II. SADC CEREAL SUPPLY AND DEMAND FOR 2011/12 MARKETING YEAR

Cereal production estimates indicate a 5% decrease in cereal production...

Final estimates indicate a 2011 SADC cereal production of 33.06 million tonnes which is 5% down on the 2010 harvest of 34.64 million tonnes, mostly because of a 12% reduction in cereal production in South Africa (Table 1). Poor maize prices in South Africa during the 2009/10 marketing year led to a reduction in area planted to maize by commercial farmers and that resulted in a reduction in overall cereal harvest in 2011.

Table 1: 2011/12 Marketing Year Cereal Food Demand/Supply and Comparison of Productions for 2010, 2011 and 5-year average (as at 30th October 2011). (*000 Tonnes)

	2011/	/12 Marketing \	Year	Cereal F	Production (year)	5-year average		
	Required*	Available**	Deficit(-)	2010	2011	% age	Production	2011 %
	_		/Surplus			change		change
Angola	2,281	756	-1,526	1,178	677	-42	875	-23
Botswana	363	128	-236	55	42	-24	40	5
Lesotho	408	115	-293	137	73	-47	103	-30
Malawi	2,878	4,135	1,257	3,572	4,080	14	3,351	22
Mauritius	318	7	-311	2	2	0	2	0
Mozambique	3,672	3,299	-373	2,641	2,935	11	2,343	25
Namibia	333	141	-191	155	117	-25	137	-14
South Africa	16,364	16,553	190	15,122	13,277	-12	12,808	4
Swaziland	188	121	-67	75	89	18	65	37
Tanzania	7,191	7,088	-103	7,095	6,787	-4	5,724	19
Zambia	2,533	4,276	1,743	3,078	3,346	9	1,969	70
Zimbabwe	3,063	2,028	-1,035	1,534	1,652	8	1,324	25
SADC	39,591	38,646	-945	34,643	33,057	-5	28,740	15

Source: SADC Secretariat and Member States (excluding Madagascar, Seychelles and DRC)

^{*} Includes gross domestic requirement and SGR (strategic grain reserves)

^{**} Includes 2011 production plus carryover stocks from previous year.

Individually, productions of both maize (26.63 million tonnes) and sorghum/millet (2.26 million tonnes) went down by 8% each in 2011 compared to 2010, while productions of wheat and rice increased by 33% and 22% to 2.35 million tonnes and 1.82 million tonnes respectively (Table 3). Significant reductions in cereals in Angola and Namibia were due to destruction of crops by floods while in Lesotho production was negatively affected by waterlogging conditions.

SADC food security situation remains satisfactory in spite of an overall cereal deficit of 945,000 tonnes ...

Domestic cereal availability in the SADC region (excluding Madagascar, Seychelles and the DRC) for the current marketing year, assessed at 38.65 million tonnes, is insufficient to cover gross domestic and strategic reserve requirements of 39.59 million tonnes, thereby leaving an overall deficit of 945,000 tonnes. However, the overall food security situation remains satisfactory in the Region, mostly as a result of overall maize surpluses as indicated below.

On individual basis, Malawi (1.26 million tonnes), South Africa (0.19 million tonnes) and Zambia (1.74 million tonnes) have overall cereal surpluses. The rest of the SADC countries are assessed with deficits ranging from 0.67 million tonnes in Swaziland to 1.53 million tonnes in Angola (Table 6).

Maize surpluses assessed in Malawi, Mozambique, South Africa and Zambia...

Overall maize availability for the 2010/11 marketing year, assessed at 30.71 million tonnes, is more than adequate to cover regional requirement of 27.98 million tonnes (including strategic grain reserves (SGR) of 2.16 million tonnes), thereby leaving a surplus of 2.73 million tonnes. This surplus is however lower than that achieved in 2010/11 marketing year of 4.81million tonnes. Maize surpluses are only assessed in Malawi (1.27 million tonnes), Mozambique (0.29 million tonnes), South Africa (1.88 million tonnes) and Zambia (1.66 million tonnes) (Table 5).

Overall deficits remain for wheat, rice and sorghum/millet...

While Member States have, in the recent years, managed to produce enough maize to cover requirements, they have not produced enough to cover requirements for the other main cereal crops of wheat, rice and sorghum/millet as indicated in Tables 2 and 4. The 2011/12 marketing year's assessments indicate deficits in wheat, rice and sorghum/millet of 2.77 million tonnes, 0.38 million tonnes and 0.53 million tonnes respectively. The Region continues to rely on imports to cover its deficits in these commodities.

Table 2: SADC overall Cereal Surplus/Deficit by Crop since 2005/06 Marketing Year ('000 tonnes)

Cereal								Avg. surplus/d
Crop	2005/6	2006/7	2007/8	2008/9	2009/10	2010/11	2011/12	eficit
Maize	2277	-486	111	1862	2811	4807	2733	1897
Wheat	-2182	-1313	-2425	-2126	-2172	-2967	-2769	-2198
Rice	-1052	-984	-944	-924	-920	-665	-383	-915
Sorghu								
m/Millet	-121	-398	-424	-424	-593	-443	-527	-401
Total	-1078	-3181	-3682	-1612	-874	732	-945	-1616

III. REGIONAL VULNERABILITY ASSESSMENTS

According to the SADC Regional Vulnerability Assessment and Analysis Synthesis Report of 2011, the total number of food insecure population in the eight countries which had conducted assessments for the 2011/12 marketing year is estimated at 2.90 million, which is 35% below 2010/11 year. The drop is partly attributed to non-availability of data from the United Republic of Tanzania which had not yet conducted its assessment by July 2011. As indicated in Table 3, the number of food insecure populations had increased in most countries, with the exception of Malawi and Swaziland while Botswana submitted the data for the first time. The persistently high food insecure people, year after year, seem to be a manifestation of chronic vulnerability and high levels of poverty in the Region.

Table 3: Food Insecure Population from 2005/06 to 2011/12 Marketing Years

	Trends in Food Insecure Population in the Region													
Country	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12							
Botswana*	-	-	-	-	-	-	10,400							
Lesotho	541,000	245,700	553,000	353,000	450,000	200,000	514,000							
Malawi	5,055,000	833,000	63,200	673,498	147,492	1,061,000	201,854							
Mozambique	801,655	240,000	520,000	302,664	281,300	350,000	350,000							
Namibia	-	-	-	-	224,795	106,297	243,474							
Swaziland	634,400	465,900	345,000	238,600	262,000	160,989	88,511							
Tanzania	848,019	995,433	581,974	780,416	240,544	1,217,767	n/a							
Zambia	1,232,700	380,537	440,866	444,624	110,000	53,629	74,804							
Zimbabwe	2,884,800	1,392,500	4,100,000	5,100,000	1,400,000	1,287,937	1,390,000							
SADC**	11,997,574	4,553,070	6,604,040	7,892,802	3,116,131	4,437,619	2,862,643							

Source: SADC FANR Directorate - Member States Vulnerability assessment Committees.

^{*} Figure from one livelihood zone.

^{**} Including only countries where assessments were made.

IV. SADC CEREAL BALANCE SHEETS FOR THE 2011/12 MARKETING YEAR.

Table 4: SADC - SUMMARY ANNUAL CEREAL BALANCE

MARKETING YEAR (Vary by Country) 2011/2012

Thousands of Metric Tons	Thousands of Metric Tons											
				Millet/	All							
	Maize	Wheat	Rice	Sorghum	Cereals	Cassava						
A. Domestic Availability	<u>30709</u>	<u>3082</u>	<u>2361</u>	<u>2494</u>	<u>38646</u>	<u>21740</u>						
A.1 Opening Stocks	4074	720	540	237	5572	167						
Formal/SGR	3807	708	471	102	5088	0						
On Farm	267	12	68	131	478	167						
Other	1	0	1	3	5	0						
A.2 Gross Harvest	26634	2362	1821	2258	33075	21572						
B. Gross Domestic Requirements	25818	4928	2699	2948	36394	20480						
C. Desired SGR Carryover Stocks	2157	923	44	73	3197	0						
D. Domestic Shortfall/Surplus	<u>2733</u>	<u>-2769</u>	<u>-383</u>	<u>-527</u>	<u>-945</u>	<u>1260</u>						
E. Commodity Cross Substitution	411	0	86	7	504	40						
F. Imports	<u>483</u>	<u>2286</u>	<u>344</u>	<u>43</u>	<u>3155</u>	<u>2</u>						
F.1 Received	140	165	32	32	369	0						
Commercial	140	153	32	32	357	0						
Food Aid	0	12	0	0	12	0						
F.2 Expected	343	2121	312	11	2786	2						
Commercial	343	2121	312	11	2786	2						
Food Aid	0	0	0	0	0	0						
G. Exports	2225	<u>242</u>	<u>o</u>	<u>29</u>	2496	<u>30</u>						
Committments Shipped	1	0	0	0	1	0						
Committments Not Yet Shipped	2225	242	0	29	2496	30						
H. Import Gap	<u>0</u>	<u>-725</u>	<u>0</u>	<u>-506</u>	<u>0</u>	<u>o</u>						
I. Forecasted Closing Stock	<u>3559</u>	<u>197</u>	<u>92</u>	<u>0</u>	<u>3415</u>	<u>1272</u>						
J. Current Stock	108	667	0	61	836	0						
K. Self-Sufficiency Ratio (%)	119	63	87	85	106	106						

Table 5: SADC

MAIZE BALANCE SHEET

MARKETING YEAR (Vary by Country) 2011/2012

Thousands of Metric Tons

	Ang	Bot	Les	Mal	Mau	Moz	Nam	RSA	Swa	Tan	Zam	Zim	SADC
A. Domestic Availability	<u>599</u>	<u>28</u>	<u>76</u>	<u>3945</u>	<u>7</u>	<u>2403</u>	<u>71</u>	<u>13509</u>	<u>101</u>	<u>4284</u>	<u>3869</u>	<u>1822</u>	<u>30709</u>
A.1 Opening Stocks	8	18	24	50	2	224	17	2336	16	161	849	370	4074
Formal/SGR	6	17	19	40	2	150	17	2336	12	90	849	270	3807
On Farm	2	0	6	10	0	74	0	0	4	71	0	100	267
Other	0	1	0	0	0	0	0	0	0	0	0	0	1
A.2 Gross Harvest	591	10	52	3895	2	2179	54	11173	85	4123	3020	1452	26634
B. Gross Domestic Requirements	1486	161	252	2617	86	2059	156	10520	131	4545	1967	1837	25818
C. Desired SGR Carryover Stocks	10	10	12	60	0	50	10	1108	2	150	240	505	2157
D. Domestic Shortfall/Surplus	<u>-897</u>	<u>-144</u>	<u>-188</u>	1268	-82	<u>294</u>	<u>-96</u>	<u>1881</u>	<u>-33</u>	<u>-411</u>	<u>1662</u>	<u>-521</u>	<u>2733</u>
E. Commodity Cross Substitution	0	0	0	0	0	0	0	0	0	411	0	0	411
F. Imports	<u>o</u>	<u>160</u>	<u>60</u>	<u>o</u>	<u>o</u>	122	<u>107</u>	<u>o</u>	<u>o</u>	<u>34</u>	<u>o</u>	<u>o</u>	<u>483</u>
F.1 Received	0	51	36	0	0	0	18	0	0	34	0	0	140
Commercial	0	51	36	0	0	0	18	0	0	34	0	0	140
Food Aid	0	0	0	0	0	0	0	0	0	0	0	0	0
F.2 Expected	0	109	24	0	0	122	89	0	0	0	0	0	343
Commercial	0	109	24	0	0	122	89	0	0	0	0	0	343
Food Aid	0	0	0	0	0	0	0	0	0	0	0	0	0
G. Exports	<u>o</u>	<u>2</u>	<u>o</u>	<u>o</u>	0	<u>153</u>	<u>0</u>	<u>2070</u>	<u>o</u>	<u>o</u>	<u>0</u>	<u>0</u>	2225
Committments Shipped	0	0	0	0	0	0	0	0	0	0	0	0	1
Committments Not Yet Ship	0	2	0	0	0	153	0	2070	0	0	0	0	2225
H. Import Gap	<u>-897</u>	<u>o</u>	<u>-128</u>	<u>o</u>	-82	<u>0</u>	<u>0</u>	<u>-189</u>	<u>-33</u>	<u>0</u>	<u>0</u>	<u>-521</u>	<u>o</u>
I. Forecasted Closing Stock	<u>0</u>	<u>24</u>	<u>o</u>	<u>1328</u>	0	<u>313</u>	<u>21</u>	<u>919</u>	<u>o</u>	<u>184</u>	<u>1902</u>	<u>0</u>	3559
J. Current Stock	0	10	8	0	0	0	0	0	0	90	0	0	108
K. Self-Sufficiency Ratio	40	17	30	151	8	117	45	128	77	94	197	99	119

Table 6: SADC

ALL CEREALS BALANCE SHEET

MARKETING YEAR (Vary by Country)

2011/2012

Thousands of Metric Tons

	Ang	Bot	Les	Mal	Mau	Moz	Nam	RSA	Swa	Tan	Zam	Zim	SADC
A. Domestic Availability	<u>756</u>	<u>128</u>	<u>115</u>	<u>4135</u>	<u>7</u>	3299	<u>141</u>	<u>16553</u>	<u>121</u>	<u>7088</u>	<u>4276</u>	2028	38646
A.1 Opening Stocks	78	86	42	55	5	364	24	3277	33	301	930	376	5572
Formal/SGR	71	66	35	41	5	250	24	3277	28	90	930	271	5088
On Farm	7	19	7	11	0	114	0	0	4	211	0	105	478
Other	0	1	0	4	0	0	0	0	0	0	0	0	5
A.2 Gross Harvest	677	42	73	4080	2	2935	117	13277	89	6787	3346	1652	33075
B. Gross Domestic Requirements	2257	338	396	2818	308	3522	283	14601	180	7041	2293	2358	36394
C. Desired SGR Carryover Stocks	24	25	12	60	10	150	50	1763	8	150	240	705	3197
D. Domestic Shortfall/Surplus	<u>-1526</u>	<u>-236</u>	<u>-293</u>	<u>1257</u>	<u>-311</u>	<u>-373</u>	<u>-191</u>	<u>190</u>	<u>-67</u>	<u>-103</u>	<u>1743</u>	<u>-1035</u>	<u>-945</u>
E. Commodity Cross Substitution	0	0	0	0	0	93	0	0	0	411	0	0	504
F. Imports	<u>o</u>	<u>359</u>	<u>143</u>	<u>0</u>	<u>o</u>	<u>830</u>	<u>250</u>	<u>1500</u>	<u>0</u>	<u>73</u>	<u>0</u>	<u>0</u>	<u>3155</u>
F.1 Received	0	123	84	0	0	0	89	0	0	73	0	0	369
Commercial	0	123	84	0	0	0	89	0	0	61	0	0	357
Food Aid	0	0	0	0	0	0	0	0	0	12	0	0	12
F.2 Expected	0	236	60	0	0	830	161	1500	0	0	0	0	2786
Commercial	0	236	60	0	0	830	161	1500	0	0	0	0	2786
Food Aid	0	0	0	0	0	0	0	0	0	0	0	0	0
G. Exports	<u>o</u>	<u>2</u>	<u>o</u>	<u>o</u>	<u>o</u>	<u>160</u>	<u>o</u>	2334	<u>0</u>	<u>o</u>	<u>0</u>	<u>o</u>	2496
Committments Shipped	0	0	0	0	0	0	0	0	0	0	0	0	1
Committments Not Yet Ship	0	2	0	0	0	160	0	2334	0	0	0	0	2496
H. Import Gap	<u>-1526</u>	<u>o</u>	<u>-149</u>	<u>0</u>	<u>-311</u>	<u>o</u>	<u>o</u>	<u>-644</u>	<u>-67</u>	<u>o</u>	<u>o</u>	<u>-1035</u>	<u>o</u>
I. Forecasted Closing Stock	<u>0</u>	<u>146</u>	<u>o</u>	<u>1317</u>	<u>o</u>	<u>540</u>	<u>108</u>	<u>1119</u>	<u>0</u>	<u>531</u>	<u>1983</u>	<u>0</u>	<u>3415</u>
J. Current Stock	0	82	32	0	0	0	0	632	0	90	0	0	836
K. Self-Sufficiency Ratio	33	38	29	147	2	94	50	113	67	101	186	86	106

