Famine Early Warning Systems Network

SOUTHERN AFRICA FOOD SECURITY BRIEF

August - September 2003

REGIONAL FOOD SECURITY MUCH BETTER THAN LAST YEAR, NATIONAL FOOD SECURITY MIXED.

2002/03 production of the major staple cereal, maize, was about 10% higher than last year at regional level; although in some countries— notably Zambia, Angola and Malawi—the increases were much greater (see maps, right). Zimbabwe's maize production, whilst much higher than last year, is still very much below the last 5 and 10 year averages . Regionally, wheat, sorghum and millet production was slightly down on last year; and rice production slightly up. Taking all cereals together, most countries saw either little change (Mozambique, RSA, Swaziland, Tanzania) or large increases. Only in Lesotho was production down significantly compared to last year. Total regional cereal production was 4% above the 1997/98 - 2001/02 average.

REGION IS MORE THAN SELF SUFFICIENT IN MAIZE, IMPORTS NEEDED TO REPLENISH STOCKS MUCH LOWER THAN LAST YEAR

Table 1: Maize Import Requirements For SADC Countries

	Import Requirements / Exportable Surplus			
	With No Stock Replen-ishment		With Desired Stock Re-plenishment	
Country	2003-04	2002-03	2003-04	2002-03
Angola	-98,000	-297,000	-148,000	-347,000
Botswana	-115,000	-110,000	-127,000	-130,000
Lesotho	-167,000	-163,000	-177,000	-173,000
Malawi	50,000	-672,000	-50,000	-732,000
Mozam-bique	-59,000	-22,300	-59,000	-22,300
Namibia	-74,000	-97,100	-84,000	-107,100
RSA	2,105,000	1,890,600	1,074,000	984,600
Swaziland	-81,000	-75,800	-84,000	-78,800
Tanzania	-335,000	-162,000	-485,000	-312,200
Zambia	175,000	-624,000	119,000	-639,000
Zimbabwe	-790,000	-1,479,100	-1,040,000	-1,979,000
TOTAL	611,000	-1,810,900	-1,060,000	-3,535,800

Source: SADC FANR (no information is available for DR Congo)

Without stock replenishment, there is a sizable **maize** surplus this marketing season, in stark contrast to last year's regional deficit of 1.8 million MT (see table, left). With desired stock replenishment, there is a deficit of just over 1 million MT (last year the deficit was over three times this amount). The size of this year's surplus in RSA is not the main factor behind these differences. More important is the reduction in shortfalls in Angola, Malawi, Zambia & Zimbabwe. Import requirements are up from last year in Tanzania (significantly) & Mozambique, and similar to last year in Lesotho, Botswana & Swaziland. At regional level, import requirements are slightly **below** the 1998/99 - 2002/03 average.

CURRENT UNCOVERED CEREAL IMPORT GAP ABOUT HALF OF TOTAL IMPORT NEEDS

Figures 1 and 2 show the extent to which planned commercial and food aid imports of total **cereals** measure up to domestic needs in SADC countries as at August 31. Like this time last year, Zimbabwe is of particular concern. The country's **unfilled cereal import gap** was over 700,000 MT at August 31. With 550,000 MT and 360,000 MT, respectively, Angola and Tanzania also had large uncovered cereal import gaps at August 31.

Fig 1: Filling the gap: Required Cereal Imports (000 MT)

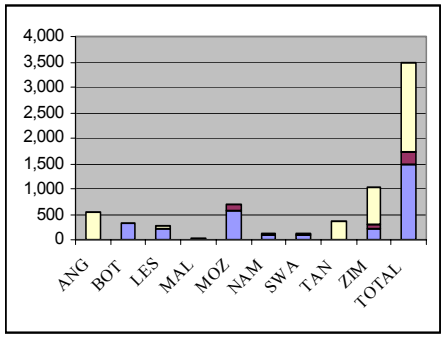
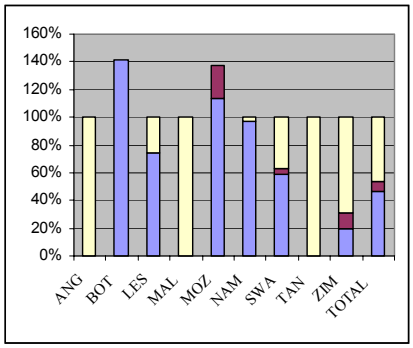


Fig 2: Filling the gap: Cereal Imports as % of Needs

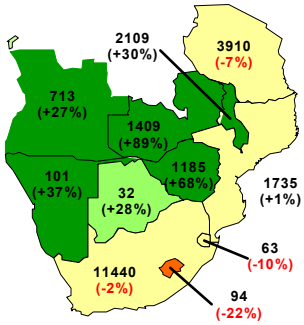


Graph Key: Commercial imports Food aid Unfilled cereal gap Source: SADC FANR

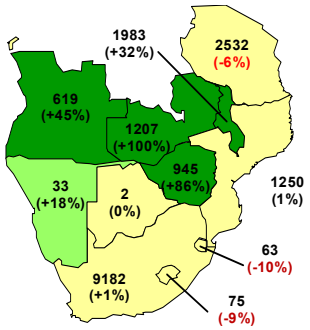
This FEWSNET Southern Africa Food Security Brief temporarily replaces the SADC Food Security Network Ministerial Brief. The Ministerial Brief—a joint publication of SADC FANR projects, FEWS NET, SC (UK), FAO and the FRSP/Zambia—has been temporarily suspended during the restructuring of SADC FANR. For more information on the contents of this brief please contact: FEWSNET/Southern Africa. E-mail: nmarsland@fews.net Internet: www.fews.net

CEREAL PRODUCTION 2002/03 (000 MT) COMPARED TO LAST YEAR (+ / - %)

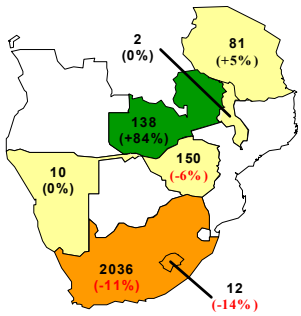
All Cereals — **Total 23,414 (+9%)**



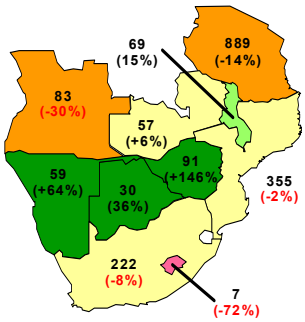
Maize — **Total 17,891 (+9%)**



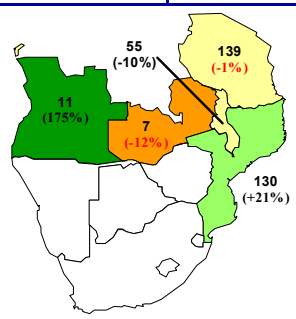
Wheat — **Total 2,429 (-7%)**



Sorghum & Millet — **Total 1,862 (-4%)**



Rice — **Total 611 (+3%)**



Source: SADC FANR August 2003

VAC FIGURES FINALIZED:
COMPARISONS BETWEEN VAC AND EMOP FOOD AID FIGURES SHOW MIXED PATTERN

In July, WFP launched a new regional Emergency Operation (EMOP) entitled *Targeted Relief to Vulnerable Households in Southern Africa.* This covers the six SADC countries assisted during last year's emergency operation, namely Lesotho, Malawi, Mozambique, Swaziland, Zambia and Zimbabwe.

Normally, EMOP estimates of cereal food aid requirements (which make up about 75% of total food aid in the current EMOP) are based on FAO/WFP Crop and Food Supply Assessment Missions (CFSAMs) that are undertaken at the request of national Governments. This year, WFP committed to updating the results of the CFSAMs with results from the various VAC assessments (and to adjust the EMOP accordingly).

The CFSAM results were published in June, and at the time the EMOP was published (July) VAC reports had not yet been released. For this reason it was not possible to use the VAC results for the EMOP, instead, CFSAM figures were drawn upon. Final VAC figures are now available, and the graphs below compare the results of the VAC assessments with the CFSAMs and the EMOP. All CFSAMs and VAC assessments in Mozambique, Zambia and Zimbabwe estimate cereal requirements only, whilst VAC assessments in Lesotho, Swaziland and Malawi estimate total food requirements expressed in cereal equivalents. The first two graphs (Figures 3 and 4) focus on the *metric tonnages (MT) of food aid* estimated for each country and overall. About two thirds of total food aid and total population numbers are accounted for by Zimbabwe, and here the different cereal estimates are fairly close. Comparing cereal estimates for the other countries, major differences are seen in Lesotho, Malawi and Zambia. At regional level, EMOP (cereal) and VAC figures are comparable.

Comparing the different *estimates of people in need* of assistance, the key comparisons are those between VAC and CFSAM results and EMOP figures for Targeted Food Distributions / Vulnerable Group Feeding (TFD/VGF) and Food For Work / Food For Training (FFW/FFT) (Figures 5 and 6). VAC and CFSAM estimates concentrate on the acute food/cereal gap likely to be faced by the able bodied rural poor, and it is these people who will make up the bulk of the "case-load" for TFD/VGF and FFW/FFT.

The overall picture is similar to that for tonnage: In Lesotho and Swaziland, VAC "average"* figures are the highest. The CFSAM did not have any figures for Zambia, but the VAC did, and VAC estimates are much lower than EMOP figures, as is also the case in Malawi. In Zambia, the difference between VAC and EMOP figures may be because urban areas, special groups such as HIV/AIDS beneficiaries, children under 5 and school feeding are included in the TFD/VGF totals, but this is not clear from the EMOP.

Focus on Lesotho, Malawi and Zambia: In *Lesotho*, the high "VAC average" figure is caused by the large difference between two scenarios used by the VAC to estimate acute food insecurity. If the more pessimistic scenario proves to be correct then the EMOP food aid figures would be inadequate. **THE LARGE DIFFERENCES BETWEEN THE VAC AND THE EMOP FIGURES IN MALAWI, AND ZAMBIA WILL NOW NEED TO BE DEBATED AND AGREEMENT REACHED.** Both these countries are food secure at the national level, and transportation of food around the country and through markets is not nearly as problematic as in Mozambique. In order for food aid to work in the context of improved general availability of food, it has to be extremely well-targeted. If not, it may do more harm than good. Cash injections in the form of targeted voucher systems, and "cash for work" may be more suitable in this situation (where food markets are functioning) although these will also need to be carefully researched and designed. Market intervention to keep prices low is also an option and this is the preferred short-term intervention option for the Malawi VAC. Food aid should be sourced locally if at all possible to stimulate markets. For this to happen donors will either need to buy food in these countries and donate it to WFP or another implementing agency or donate cash.

Regional considerations: The same point applies at a regional level. Subject to cost and logistical considerations, as far as possible the South African maize surplus should be tapped to meet cereal needs in Southern Mozambique, Lesotho, Swaziland and Zimbabwe. **IF THE EMOP APPEAL IS MET WITH LARGE EXTERNAL FOOD DONATIONS, THIS WILL NOT HAPPEN.**

Assessment methodology considerations: Analysis of VAC and CFSAM findings reveals a critical gap in current assessment methodologies: a lack of food market analysis. This makes it very difficult to decide upon the mix between food and cash to meet food access problems. This shortcoming should be addressed as a matter of urgency for future assessments.

* These "average" figures are obtained by taking the mean of the difference between two different scenarios developed by these VACs (the Malawi VAC also developed scenarios). For the VACs in Mozambique, Zimbabwe and Zambia just one scenario was used hence the "low" and "average" figures are the same.

Fig 3: CFSAM, VAC, EMOP ESTIMATES OF FOOD AID TONNAGES

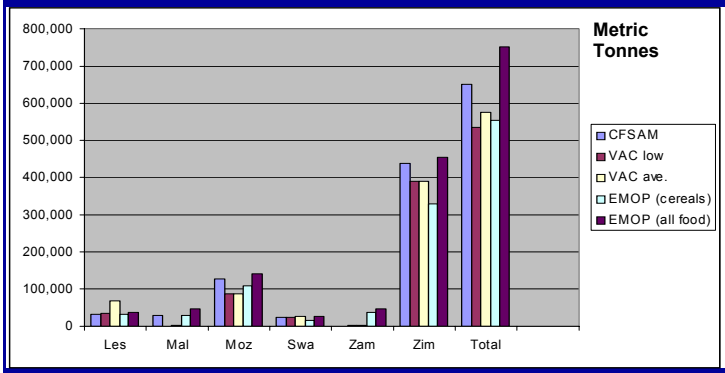


Fig 4: FOOD AID ESTIMATES AS % OF EMOP TOTALS

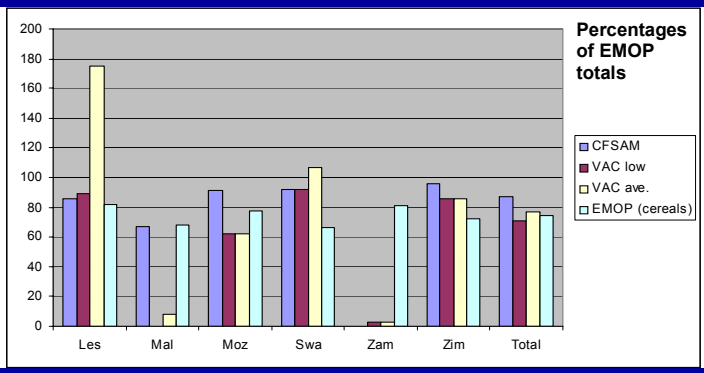


Fig 5: CFSAM, VAC, EMOP ESTIMATES OF PEOPLE IN NEED

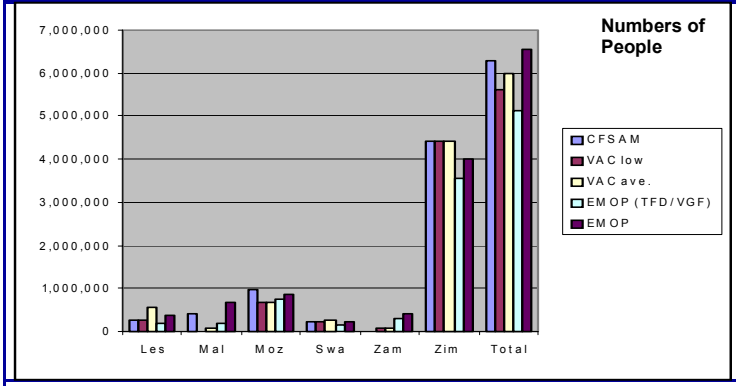
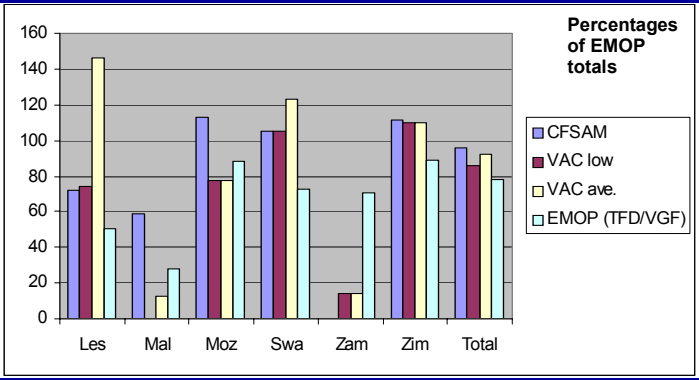


Fig 6: POPULATION ESTIMATES AS % OF EMOP TOTALS



Data sources for all graphs: CFSAM reports, National VAC reports, WFP EMOP. **Note:** the Mozambique tonnage figures and the Lesotho and Swaziland population figures in the graphs have been estimated based on VAC population figures (Mozambique) and VAC tonnage figures (Swaziland and Lesotho). The Malawi, Swaziland and Lesotho VAC reports state explicitly that the figures given for food aid are in fact food aid equivalents. These VACs do not give a particular tonnage of food aid per se, rather they point out how much food aid would be required if food / income deficits were to be met with food aid alone.