



**Famine Early Warning Systems Network**  
**SOUTHERN AFRICA FOOD SECURITY BRIEF**  
**March, 2004**

**SUMMARY:**

The 2003/04 season has been a very challenging one for southern Africa's agriculture with countries experiencing both drought and flood conditions within the same crop growing season. Overall, improved rainfall over the January-March period brought about a marked improvement in crop growing conditions and was beneficial to the late planted crop, and where applicable – a second season crop. Many countries are reporting a significant amount of late plantings as a result of the late onset and erratic rainfall that necessitated multiple plantings. Higher prices, driven by weather worries, also encouraged second season cultivation. Nonetheless, recent flooding along the banks of the main river systems, especially in Zambia and Namibia, as a result of heavy downpours, have raised concerns that crop yields could be further reduced as some crop lands have been washed away.

Projected regional maize availability has improved mainly as a result of increased harvest expectations in South Africa, where total supply (production *plus* opening stocks) is now expected to reach 9.85 million MT. Consequently, the commercial shortfalls in Botswana, Lesotho, Namibia, Swaziland and Mozambique can be adequately covered with the South African exportable surplus, estimated at 1.93 million MT.

Although official forecasts are still to be released in most countries, preliminary assessments from Namibia, Mozambique and Zimbabwe indicate significant improvements in production prospects. The major concern will be food access among the poor facing above-normal food prices.

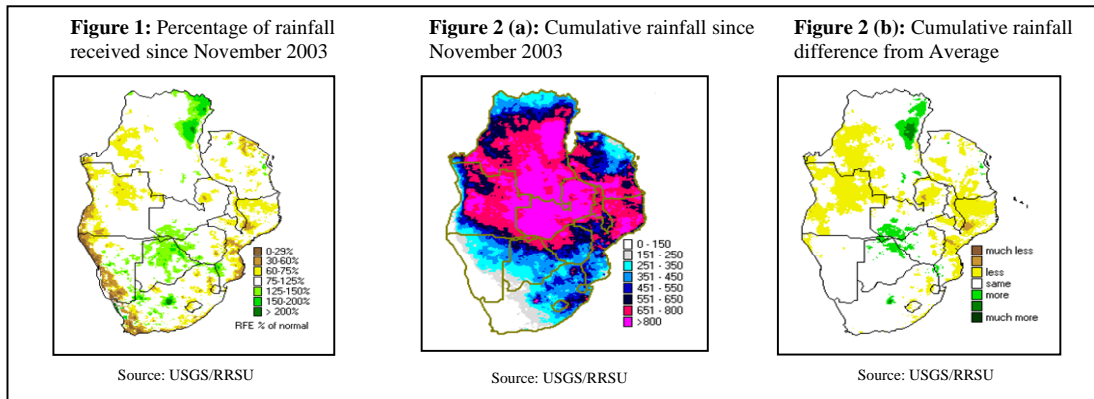
The FAO/WFP Crop and Food Supply Assessment Missions and national Vulnerability Assessments to be fielded in April-May in the most affected countries of Lesotho, Malawi, Mozambique, Swaziland and Zimbabwe will provide information that will form the basis for targeted interventions and other developmental strategies aimed at responding to the needs of the vulnerable and food insecure, and sustaining increasingly fragile livelihoods, especially in HIV/AIDS affected households.

**RAINFALL PERFORMANCE IMPROVES OVER THE JANUARY – MARCH PERIOD...**

The 2003/2004 season has been a very challenging one for southern Africa's agriculture with drought and floods being experienced within the crop growing season. Although it appears as though most of the region has received normal rainfall (Figures 1 and 2(a) and 2(b)), its temporal and spatial distribution in many parts has not been satisfactory. Satellite derived imagery depicting percentage of rainfall received (Figure 1) indicates that most parts of the region have received 75-125% of the normal rainfall except for parts of Angola, Tanzania, Malawi, Mozambique, Zimbabwe, Lesotho, Swaziland and South Africa that have received less than 75%. These areas may experience reduced yields due to insufficient rainfall coupled with late and erratic onset. Maize (the main staple food crop) requires rainfall in the range of 500-800 mm, depending on variety. Figure 2 (a) shows the cumulative amounts received since the beginning of the season and only the DRC, Angola, Zambia and parts of Tanzania and Malawi have received more than 650 mm, with heavy downpours and flooding in parts of Western Zambia, Northern Namibia and Angola. Areas with less than 650 mm may expect poor crop yields as this the minimum for early or medium maturing maize varieties, depending on the planting date. SADC Regional Early Warning System Agromet Updates have reported on the early false onsets of rainfall, resulting in multiple replanting of the crops where seed was still available. However, field reports point out that some farmers throughout the region did not have sufficient seeds to replant.

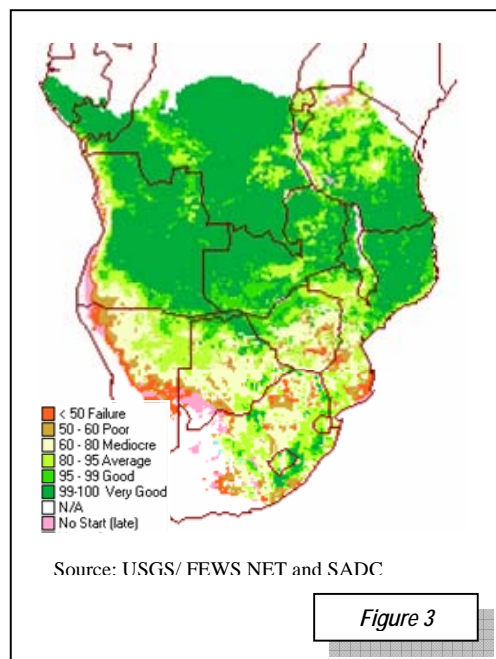
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### PRODUCTION PROSPECTS REMAIN BELOW NORMAL...

With the 2003/04 crop production season nearing the end in most Southern Africa countries, governments and partners are planning and conducting crop assessment/ forecasting surveys and vulnerability assessments that will provide an indication of food security prospects in the year ahead.



Using a water requirement satisfaction index based on satellite-derived data, Figure 3 gives a preliminary picture of what may be expected in terms of maize production. According to this analysis, southern Mozambique, southern Malawi, much of Zimbabwe, parts of north western and eastern South Africa are likely to experience reduced yields as a result of water deficits. This analysis assumes that the crops were planted with the first optimum onset of rains that occurred this season. However, considerable replanting occurred between November and January in many parts of the region. With this in mind, further analysis done using November, December and January as planting dates showed that crops that were planted in December are likely to produce better results than depicted in Figure 3 in some areas such as Zimbabwe, Malawi, southern Mozambique and the eastern coastal areas of South Africa. Nonetheless, early maturing varieties planted in December are not likely to perform as well as the same varieties planted in January, when rains started falling more consistently in the southern parts of the region. Maize planted in February is unlikely to yield very well as the

winter period approaches under which biological activities in the plants are reduced due to lower than optimal temperatures.

### PRELIMINARY HARVEST INDICATIONS MIXED...

#### ANGOLA:

At the start of the season the Ministry of Agriculture estimated higher production as a result of increased area planted due to the increasing numbers of resettled IDPs. Production recovery prospects have, however, been dampened by excessive rains and floods which have caused serious crop damage along the main river beds. Flood damage in Huambo will reduce maize yields by up to one-third in some zones.

#### BOTSWANA:

Following normal to above-normal rains since January and generally improved crop growing conditions, the country, through its inter-ministerial Drought Assessment Tour, has assessed a total cereal harvest of 30,000 MT, which is 5% below last year's harvest of 32,000 MT, but is significantly higher (40%) than the 5-year average. Pasture for livestock is much improved.

<p><b>MOZAMBIQUE:</b> Despite a poor start to the season, the Early Warning Department of the Ministry of Agriculture and Rural Development estimates that overall crop production will increase this year compared to last year, with cereal, pulse and tuber production all up by 6-6.5%. This optimism is largely as a result of the favorable rains received since January. Reports indicate that these rains not only facilitated the recovery of some drought-resilient crops (cassava, sweet potatoes and cowpeas), but also allowed for new plantings of maize, rice, and beans that have been developing reasonably well due to continued favorable growing conditions.</p>
<p><b>ZIMBABWE:</b> The Ministry of Agriculture and Rural Development has released the first crop production estimates for the 2003/04 season. Maize production is forecast to increase by up to 30% over the 5-year average to 1.7 million MT. Total cereal production (excluding winter wheat) is currently estimated at 1.93 million MT. The increase is largely as a result of an increase in area planted and optimistic yield estimates ranging between 1.1MT/ha and 2 MT/ha. The Ministry's National Early Warning Unit is finalizing results of its March 1-14 crop assessment tour. These results are expected to provide a check on the current estimates, which may be optimistic. Further, government has requested a UN led (FAO/WFP) crop and food assessment mission that will also help verify and validate the estimates.</p>
<p><b>MALAWI:</b> The first round of production estimates, released in mid March, only covers the smallholder sector. It is expected that the next round will include winter grain production and estimates from the estate sector. Small holder cereal production (maize, rice, wheat, sorghum and millet) is currently estimated at 1.7 million MT. These estimates reflect a drop (4%) only in maize production when compared to last year. Other cereal crops, cassava and sweet potatoes are forecast to have increased marginally by between 1% (sweet potatoes) and 9% (cassava) over production last year. An FAO/WFP crop and food assessment mission is scheduled for April/May, and their report may benefit from the results of the second round of crop forecasts.</p>
<p><b>ZAMBIA:</b> As the rainfall season draws to an end, crop condition over much of the country remains fair to good, except in the valley areas of the Upper Zambezi basin and Luangwa Valley where excessive rains and floods have washed away the crops planted in the low lying areas. Nonetheless, crop production levels are still expected to remain at levels similar to those achieved last year when total cereal production was estimated at 1.4 million MT. There is growing concern, however, that further delays in conducting the crop forecasting survey may jeopardize contingency planning efforts for the ensuing marketing season. Due to the favorable prospects, no independent food and crop assessment is foreseen for Zambia; therefore the government survey will be the only source of crop estimates.</p>
<p><b>NAMIBIA:</b> The national Early Warning Unit of the Ministry of Agriculture, Water and Rural Development has released its first crop forecast which indicates a much improved cereal harvest of 155,100 MT, 54% above last year's level and 56% above the recent 5-year average. These estimates however assume a continuation of the favorable rainfall pattern that has been observed over much of the growing season.</p>
<p><b>LESOTHO:</b> A snapshot assessment in late February carried out jointly by FAO/WFP and the Ministry of Agriculture indicates a severe reduction in crop yields with total production estimated at 40,620 MT, a 54% drop compared to last year's FAO/WFP estimate of 89,100 MT. The report cautions however that February is too early in the season to accurately predict the outcome of the harvest.</p>
<p><b>SWAZILAND:</b> Using a water requirements satisfaction index, the National Early Warning Unit has predicted an end of season maize harvest of 83,269 MT. This forecast contrasts quite significantly with the results of a February joint Ministry of Agriculture and FAO/WFP rapid assessment that forecast maize production at 70,300 MT, a 3% drop compared with the June 2003 FAO/WFP estimate of 72,600 MT. Current forecasts will be validated by the upcoming FAO/WFP crop and food supply assessment mission that is scheduled for early May.</p>
<p><b>TANZANIA:</b> Although crop production in the northern bimodal rainfall areas is estimated to decline by 40-50 %, crop performance in the unimodal areas is quite good, and is expected to be further enhanced by the favorable rains that are forecast over most parts of the country for the March – May period. No estimates have been released at this stage.</p>
<p><b>SOUTH AFRICA:</b> The crop production outlook in South Africa looks brighter as a result of better rainfall during the second half of the season. The National Department of Agriculture's Crop Estimates Committee (CEC) issued its third forecast on March 19 and estimates the total maize crop at 7.672 million tonnes to be significantly up from the February estimate of 6.7 million MT. Maize, wheat, and sorghum production is estimated at 9.38 million MT, which is 18% below last year's level of 11.47 million MT and 17% below the 5-year average.</p>

## THREAT OF FLOODING MAY FURTHER REDUCE PRODUCTION PROSPECTS...

The latest SADC RRSU/ FEWS NET Regional Flood Watch reports that many areas in the sub-region have been affected by flooding conditions during the second half of the rainfall season as a result of incessant heavy downpours in the affected countries.

In mid March, the Okavango River (which continues to rise due to heavy rains in Angola), was reported to have partially flooded settlements in the Okavango Delta in **Botswana**, endangering the lives of area residents who had not yet moved from islands along the delta. .

Heavy floods in the northeast and southeast areas of **Zimbabwe** necessitated the issuing of flood alerts in Muzarabani and Chiredzi Districts. The heavy rains have however been beneficial to pasture rejuvenation, topping up of dam levels and providing good soil moisture and irrigation water for winter cropping.

In **Mozambique**, the inundations caused by heavy rains have destroyed some crops in a number of lowlands along main rivers including the Zambezi, Limpopo, Pungue, Save and Buzi rivers. FEWS NET reports indicate that crop damage has not been extensive, but that the recent rains have been more beneficial to crop development and enhanced growing conditions for the second season crop. By mid March, water levels in the Pungue (which burst its banks in early March), the Save and Buzi rivers were reported to be subsiding back to normal levels.

FEWS NET Zambia reports that exceptionally heavy rains in Eastern and Western Provinces in **Zambia** led to flooding of the valley areas, causing part of the crop in low-lying areas to be washed away. In Western Province flooding was confined to the valley areas of the upper Zambezi Basin, while in Eastern Province, floods occurred in the Luangwa Valley, affecting Mambwe, Nyimba, Petauke and Katete Districts.

In **Angola**, a joint FEWS NET/FAO/WFP mission reported that smaller farmers in parts of Huambo could have maize yields reduced by one third due to torrential rains that have washed away some croplands and rendered many roads impassable. Heavy rains in Angola continue to inundate river systems causing flooding in neighboring countries. The Zambezi burst its banks along the eastern border of the Caprivi in northern **Namibia** and the Okavango in Botswana. According to IRIN reports (April 2), the flooding in the Caprivi that began in February has affected 40,000 people, spurring government and humanitarian agencies to provide emergency relief and help evacuate affected villagers.

## NATIONAL VAC AND FAO/WFP CFSAMS PLANNED FOR 2004...

Plans for national vulnerability assessments and joint FAO/WFP Crop and Food Supply Assessment Missions are at an advanced stage. Based on agreements at the February 27 meeting between the two

Country	Dates for VAC assessments	Dates for FAO/WFP CFSAM	Dates for VAC/CFSAM discussion
Lesotho	19 April – 7 May	11 May – 29 May	18 May – 19 May
Swaziland	12 April – 30 April	1 May – 29 May	9 May – 10 May
Malawi	22 March – 16 April	22 April – 22 May	12 May – 14 May
Mozambique*	1 March – 7 May	24 April – 22 May	12 May – 14 May
Zimbabwe*	13 April – 7 May	17 April – 15 May	5 May – 7 May

Source: National Vulnerability Assessment Committees, FAO/WFP

\*Formal request already submitted

UN agencies, donor representatives and government representatives of the affected countries, the FAO/WFP assessments will draw upon the results of the more detailed vulnerability assessments that will be conducted prior to the CFSAMs by the Vulnerability Assessment Committees in each country. As agreed, both these processes will involve observers

from the donor and humanitarian communities, in an effort to foster transparency, credibility and build consensus on required humanitarian action and coordination.

### **Lesotho and Swaziland release the results of their preliminary vulnerability analysis...**

In February and March, the Lesotho Vulnerability Assessment Committee (LVAC) and the Swaziland Vulnerability Assessment Committee (SwaziVAC) each conducted national vulnerability monitoring exercises which were meant to provide early indications (warnings) of livelihood vulnerability during 2004/05. These studies (scenario analysis) involved secondary analysis of hazard information and a computer based modeling exercise (RiskMap version 1.2). The LVAC study suggests that as a result of multi-year droughts and declining resiliency, rural populations countrywide will be affected by income/food deficit ranging from 25% (Peri-Urban) to 41% (Southern Lowlands). The total food deficit ranges between 63,442 MT and 107,069 MT. The SwaziVAC study indicates that up to 348,000 people in the most affected

areas will most likely face income/food deficits ranging between 21,600 MT and 24,700 MT. The worst affected areas are in the Lowveld cattle, cotton and maize zone (63% deficit) while the Lubombo Plateau, with 19%, is the least affected.

Although the exercises use very preliminary crop production data, the results raise serious concern over an apparent deepening crisis in both countries. Both VACs will undertake more extensive vulnerability assessments in late April, which will link into and inform the FAO/WFP CFSAM scheduled for May. These assessments will verify and modify some of the assumptions underlying the preliminary analyses and provide a more robust assessment of vulnerability and recommendations for interventions.

### ***Dramatic increases in numbers needing assistance reported in Tanzania...***

A government led vulnerability assessment conducted in February 2004 concluded that up to 3.5 million people would require assistance in March 2004, with the numbers dropping off to 1.8 million in April, and 874,316 in May as the *Masika* and *Msimu* harvests become available. These results, which indicate a much higher estimate of populations requiring assistance compared to the June/July 2003 assessment results, suggest that the 2003/04 food shortages have been more widespread than earlier assessed.

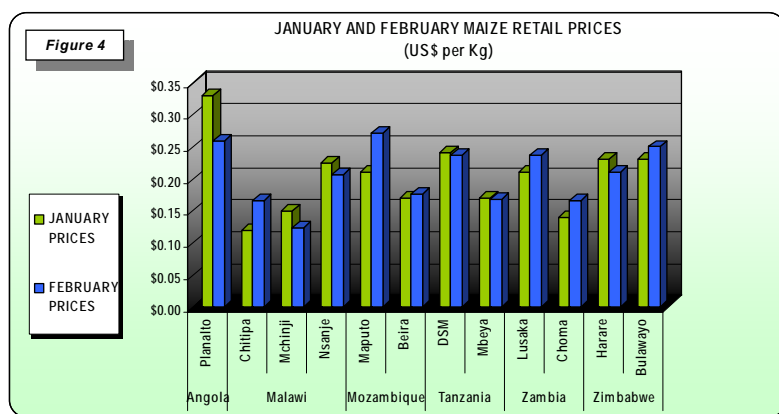
## NUMBERS ASSESSED AS REQUIRING ASSISTANCE REMAIN HIGH...

NUMBERS REQUIRING ASSISTANCE – 2003/04				
Country	Total No. in need	Period assistance is required	Source and date of last update	June 2003 CFSAM Estimates
Lesotho	600,000	Until June	WFP Jan 2004	270,000
Swaziland	265,000	Until next harvest	National Disaster Task Force January 2004	217,000
Malawi	473,388 433,063 435,538 413,013	March April May June	WFP January 2004	400,000
Mozambique	659,000	Until March/April	National VAC assessment November 2003	949,000
Zimbabwe	7.52 million (5.02 rural and 2.50 urban)	Until next harvest	Zimbabwe National VAC January 2004	5.423 million
Tanzania	3.5 million 1.8 million 874,000	March April May	Government Rapid VA February 2004	633,024*

\*Joint partners and Government Rapid Vulnerability Assessment of June/July 2003

During the January to March period (the lean season), many households in the region had to grapple with extreme food deficits as their meager food stocks from last year's poor harvest were fully depleted, and prices of staple foods began to rise markedly. Results from rapid vulnerability assessments undertaken during this period indicate that, except for Mozambique, the numbers of those requiring assistance increased substantially over the initial estimates of the CFSAM missions of June 2003.

The numbers are expected to decline as the new harvest comes in and field reports indicate that in March, some households in areas where planting was early were already benefiting from the harvest of green maize and other seasonal crops. Even though prices of staple crops (see Figure 4 for maize) in many countries in the region were reported to be still rising, they are expected to begin to stabilize, and then decline with the new harvest. However the generally poor 2003/04 production prospects over much of the region, coupled with increasing poverty levels, the impact of HIV/AIDS, and overstretched coping capabilities means that the numbers of the food insecure will remain



quite high through 2004 in the affected countries. Continuous close monitoring of vulnerability indicators is therefore recommended.

### SOUTH AFRICA'S SURPLUS WILL HELP FILL THE MAIZE GAP IN 2004/05...

The maize estimate released on March 19 by the South Africa National Department of Agriculture's Crop Estimates Committee (CEC) suggests a marked improvement in maize availability prospects in southern Africa. Supply/demand projections based on information from the National Department of Agriculture and Grain SA indicate that the country will produce an adequate crop of white maize and meet all its domestic requirements. In addition to improved harvest expectations of 7.672 million tons, opening stocks on May 1, 2004 have been revised upwards from 1.9 million MT to 2.2 million MT, bringing total domestic availability to 9.8 million MT. The country will however fall short of yellow maize requirements and is expected to import up to 350,000 MT. Using preliminary availability indications from other SADC member States, this assessment suggests that the South African white maize surplus will be sufficient to cover current export requirements from neighboring Botswana, Lesotho, Namibia, Swaziland and others, estimated at 895,000 MT and still project a surplus of 1.03 million MT (without replenishment of pipeline stocks) or 83,000 MT with stock replenishment.

#### 2004/05 PROJECTED REGIONAL MAIZE BALANCE

	SOUTH AFRICA			Other	All
	White	Yellow	Total	SADC* Total	SADC Total
Opening stocks	2251	436	2176	452	2628
Gross Production	4724	2948	7672	9154	16826
Total Availability	6975	3384	9848	9606	19454
Gross requirements	5088	3188	7921	11148	19069
Desired stock req's	550	420	949	631	1580
Total Demand	5638	3608	8870	11779	20649
Deficit/Surplus	1337	-224	978	-2173	-1195
Deficit/Surplus**	1887	196	1927	-1542	385

Source: SADC FANR, National Early Warning Units, Grain SA, FEWS NET

\*Other SADC countries excluding South Africa

\*\* Deficit/Surplus without desired stock replenishment

In response to the favorable supply situation, maize prices on the South African Futures Exchange (SAFEX) are now climbing down from the high levels of US\$ 198 (white), and US\$ 204 (yellow) achieved in February, to a March price closer to average of US\$165 per ton (white) and US\$184 per ton (yellow). The South African currency remains strong, having averaged R6.62 per US \$ over the month of March, which will also encourage private cereal importers.

#### ***SA Wheat Crop expected to increase over last season....***

The latest South Africa CEC estimates on winter crop production indicate that an increased number of farmers intend to plant winter wheat. If these intentions materialize, the planted area of 851,200 ha is

expected to yield a total wheat harvest of between 1.87 million MT and 2.30 million MT, compared to the low harvest of 1.47 million MT last year. Significant quantities of wheat are also expected to be imported to augment available supplies. Last year (2003/04), wheat imports were estimated at 1 million MT, while projections from GrainSA put this year's import plans at between 516,000 – 941,000 MT.