Food Security Early Warning System

FOOD SECURITY UPDATE – November 2010

SADC Food Security Update - Issue 3 Released: Gaborone, 20 December 2010

REGIONAL SUMMARY

- ***Satellite imagery indicate timely onset of seasonal rains in most parts of the SADC Region….***Current reports indicate that seasonal rains had started on time in most parts of the Region. However, nearly a month delay was observed in parts of eastern Zambia, eastern South Africa and the Democratic Republic of Congo, while main rains are yet to start in northern Mozambique and parts of southern Tanzania.

- ***Generally normal rains received by the end of November 2010 and also expected during December – February 2011 period….*** Satellite imagery and ground reports indicate that, by end of November 2010, near normal rains had been received in most parts of the Region. Latest rainfall forecasts also indicate normal to above normal rainfall in most parts of the Region during December – February 2011 period.

- ***Floods and Cyclones expected in some parts of the Region….*** Floods are likely in parts of Southern Angola, northern Namibia and western Zambia while tropical cyclones may affect Mauritius, Madagascar and Mozambique.

- ***Lack of access to improved seed and fertilizers may compromise cereal production ….*** In spite of improved rains, improved cereal harvest in 2011 may be compromised by lack of access to improved seed and inorganic fertilizers especially among smallholder farmers who are the main cereal producers in all countries except in South Africa. Government support to smallholder farmers is essential in all Member States.

- ***Revised 2010 SADC cereal production indicate a 10% increase over last season…*** Revised estimates indicate a regional cereal (i.e. maize, wheat, rice and sorghum/millet) production of 34.76 million tonnes, which is 10% higher than the 2009 final harvest of 31.59 million tonnes and 30% higher than the 5-year average of 26.79 million tonnes *(Table 3)*.

- ***A revised overall cereal surplus of 1.02 million tonnes….*** An overall cereal surplus of 1.02 million tonnes is assessed, down from 2.18 million tonnes assessed earlier in August 2010. Regional maize has been revised to 5.03 million tonnes while regional deficits of wheat, rice and sorghum/millet are at 2.89 million tonnes, 0.67 million tonnes and 0.46 million tonnes respectively.

- ***Number of people requiring humanitarian assistance revised downwards to 3.10 million …***The number of people requiring humanitarian assistance has been revised downwards from 4.04 million assessed in August 2010n to 3.10 million as a result of new assessments in Malawi, Mozambique and Tanzania. *(Table 2).*

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Normal rains have been received in most parts of Region by the end of November 2010...

Analysis of satellite rainfall estimates suggests that the rainfall season has started in earnest over most parts of the SADC region, with most areas experiencing their onset of rains in November (green colours, Figure 1a). However, the season was delayed by nearly a month in a few areas including parts of eastern Zambia, eastern South Africa and D.R.C. (bright orange and red colours, Figure 1b). The season is yet to start in some areas such as northern Mozambique and southern/central Tanzania. This is normal however, as the season usually starts in late November to early/mid December in these areas.

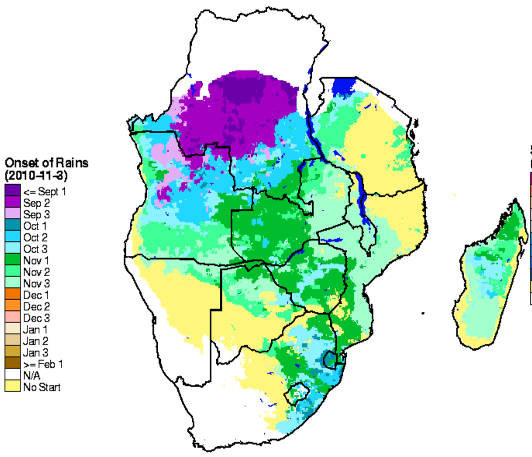


Figure 1(a): Onset of rains by 30 November 2010

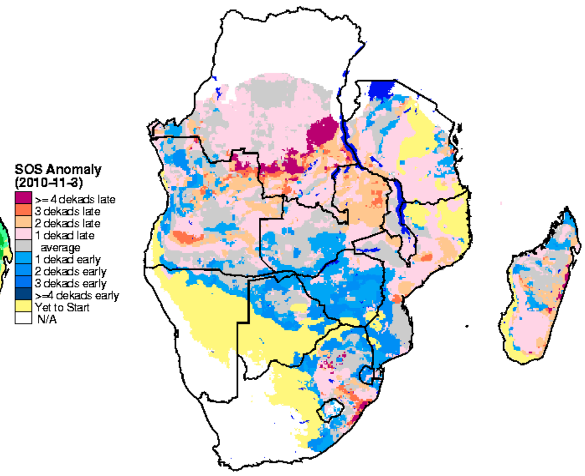


Figure 1b: Rainfall start of season anomaly

Rainfall has been near normal in most parts of the SADC region, with the southern areas generally having experienced normal to above-normal rainfall in many areas, and the northern areas having experienced normal to below-normal rainfall in many areas (Figure 2). In Figure 2, areas in white depict near normal rainfall, areas in green depict above-normal rainfall, while areas in yellow are showing above normal rainfall. The observed rainfall is generally exhibiting similar trends to those forecast by SARCOF, though it should be noted that the time scale for this analysis is different (Sep-Nov) from that for the SARCOF forecast (Oct-Dec).

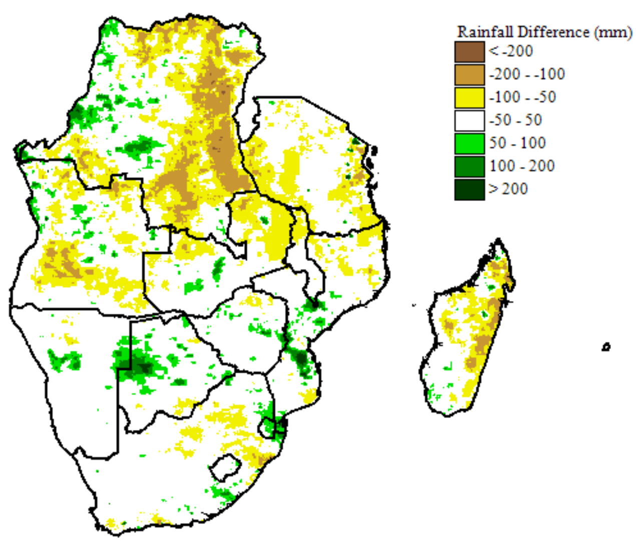
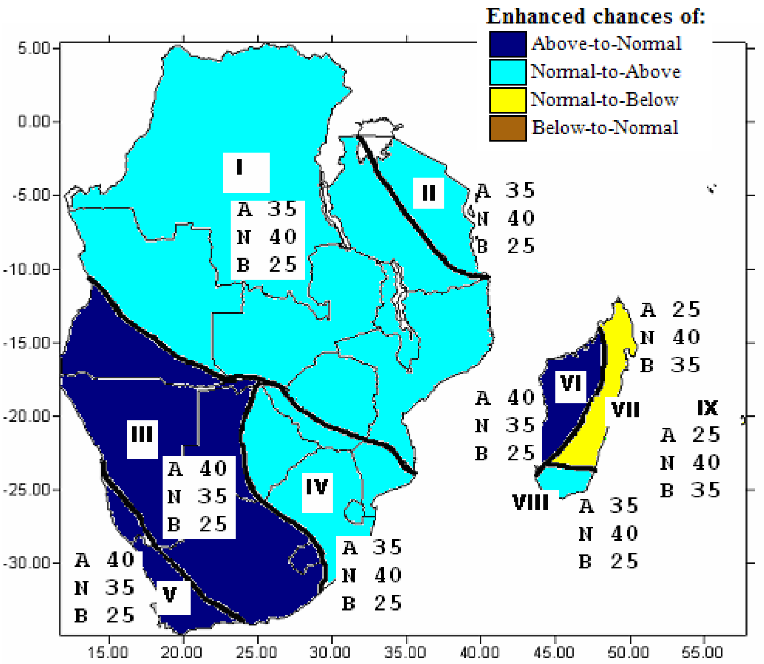


Figure 2: Rainfall anomalies for 1 September to 30 November 2010

Normal to above normal rains forecast for December – February 2010 Period….

The SADC Climate Services Centre recently issued an update of the rainfall forecast for December 2010 to February 2011. The forecast suggests an increased likelihood of normal to above-normal rains in most parts of the SADC Region, except for western Madagascar, where normal to below-normal rains are expected. This forecast is mostly in line with La Nina condition, which tends to be associated with above-normal rains in most parts of the SADC region except for the north-eastern areas, in particular north-eastern Tanzania (Figure 3).

Figure 3: Rainfall forecast for Jan – March 2011



Agricultural activities and Crop Conditions: Selected Country Reports…

A few national agrometeorological reports are summarized below, for those countries from which national reports were obtained. The main agricultural activities in most of the countries have been land preparation and planting, as most areas have recently received their planting rains.

Botswana: The main rains started in October in most areas. Normal to above normal rains have been received except in a few districts such Kgalagadi-south, South East, Southern, Kgatleng, Kweneng, Chobe, Ngamiland, much of Ghanzi and northern parts of Central Districts which received below normal rains. Land preparation was underway by the end of October.

Malawi: Reports from Malawi as of mid-November indicate that land preparation and acquisition of inputs through normal purchases and under the government input subsidy program has been underway. Sufficient rains were received in the south in late November to allow planting.

Mozambique: Reports indicate that households were mostly involved in land preparation but planting had begun in some areas where the rains had started. Most areas in the southern and central areas received significant rains during the last 10 days of November.

South Africa: Widespread rains were received in South Africa in November, which was good for planted crops. Farmers have registered intentions to plant 2.469 million hectares of maize, translating to approximately 11.7 million tonnes, assuming average yields.

Tanzania: Reports from Tanzania indicate that rainfall in the first (*Vuli)* season in the bimodal areas has not been performing well, and this could adversely affect crop production for the first crop.

Zambia: Reports indicate that land preparation and planting are on-going. Distribution of inputs is still underway. According to the rainfall estimates, most areas in the western half received significant rains by the beginning of November, and while the eastern half received significant rains towards the end of November.

Zimbabwe: In Zimbabwe, reports indicate a shortage of soya bean seed may affect the area planted, and limited purchasing power has affected the ability of some farmers to purchase fertilizer in some districts. The input program by government and donors is still ongoing. Pasture had been extensively damaged by wildfires that occurred in Zimbabwe during the dry period.

II. CEREAL SUPPLY UPDATE FOR THE 2010/11 MARKETING YEAR

Revised cereal production estimates indicate a 10% increase in cereal production compared to last year ….

Final estimates indicate a SADC revised cereal production of 34.76 million tonnes, down on an earlier forecast of 35.53 million tonnes but still 10% higher than the 2009 harvest of 31.59 million tonnes. Overall cereal production has been revised downwards compared to August 2010 forecasts in Angola, Botswana and South Africa while estimates from the rest of countries remain the same (Table 1).

Individually, Regional maize production is estimated at 28.94 million tonnes (down from August estimate of 29.60 million tonnes) while wheat, rice and sorghum/millet are estimated at 1.87 million tonnes, 1.49 million tonnes and 2.46 million tonnes respectively.

Table 1: 2010/11 cereal Demand and Supply and Comparison of 2010 Production to 5 – Year average

	2010/11 Required ('000 tons)	2010/11 Available ('000tons)	2010/11 Expected Surplus/ Deficit ('000 tons)	2009 Production ('000 tons)	2010 Forecast Production ('000 tons)	2010 Prodt.% Change over 2009	5 - Year Average Production ('000 tons)	5 - Year Average 2010 % Change
Ang	2,226	1,256	-970	1,053	1,178	12%	817	44%
Bot	419	139	-280	42	55	30%	34	63%
Les	369	207	-163	86	137	59%	100	37%
Mal	2,638	3,761	1,123	3,834	3,572	-7%	2,904	23%
Mau	318	7	-311	2	2	0%	2	0%
Moz	3,672	3,047	-625	2,526	2,641	5%	2,195	20%
Nam	368	181	-187	111	155	40%	125	24%
RSA	16,515	18,438	1,923	14,855	15,235	3%	12,507	22%
Swa	158	84	-73	71	75	6%	63	19%
Tan	7,191	7,396	205	5,265	7,095	35%	5,308	34%
Zam	2,263	3,433	1,170	2,182	3,078	41%	1,567	96%
Zim	2,328	1,538	-790	1,561	1,534	-2%	1,176	30%
SADC*	38,465	39,488	1,022	31,588	34,757	10%	26,787	30%

* SADC (excluding DRC, Madagascar & Seychelles)

SADC food security situation remains satisfactory with an overall cereal surplus of 1.02 million tonnes…

As a result of the downward revision of cereal production in Angola, Botswana and South Africa, the SADC overall cereal surplus has been revised downwards from 2.18 million tonnes in August 2010 to 1.02 million tonnes, which is, however, still better than 2009/10 cereal deficit of 0.87 million tonnes

On individual basis, overall cereal surpluses are available only in Malawi (1.12 million tonnes), South Africa (1.92 million tonnes), Tanzania (0.21 million tonnes) and Zambia (1.17 million tonnes). The rest of the SADC countries are assessed with deficits ranging from 0.73 million tonnes in Swaziland to 0.97 million tonnes in Angola.

Maize surpluses assessed for Malawi, Mozambique, South Africa, Tanzania and Zambia….

Overall maize availability for the 2010/11 marketing year, assessed at 32.04 million tonnes, is adequate to cover regional requirement of 27.01 million tonnes (including SGR of 1.66 million tonnes), thereby leaving a surplus of 5.03 million tonnes. Surplus maize are assessed in Malawi (1.16 million tonnes), Mozambique

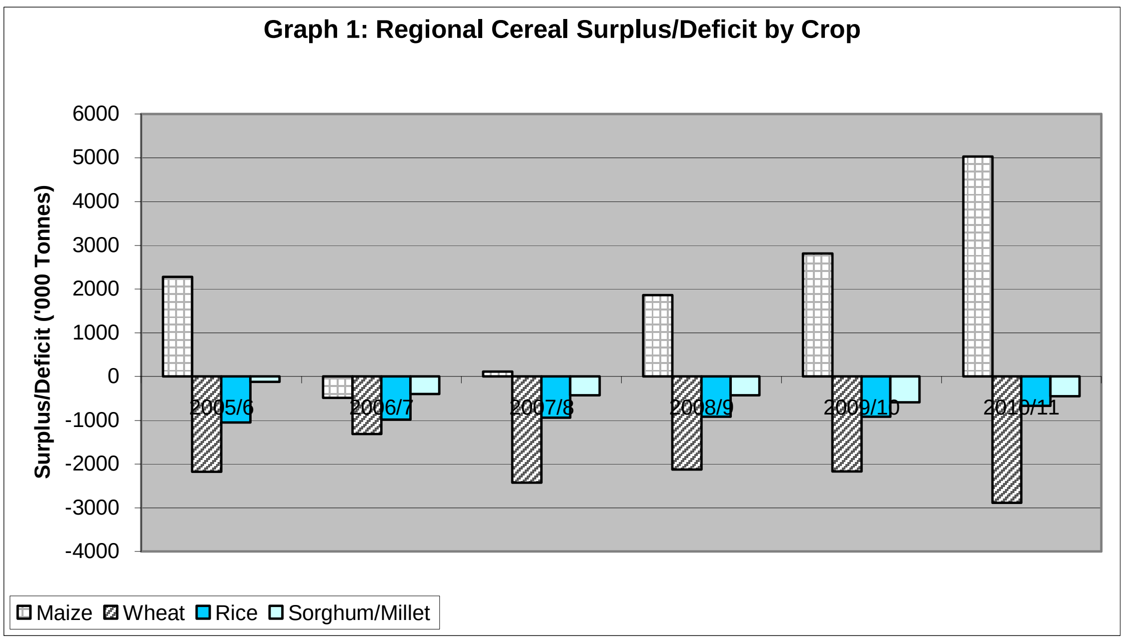
(0.06 million tonnes), South Africa (3.81 million tonnes), Tanzania (0.20 million tonnes) and Zambia (1.17 million tonnes).

Exportable maize surpluses available within the Region….

During the meeting of Ministers responsible for Agriculture and Food Security held on 5th November 2010 in Windhoek, Namibia, the Zambian delegation indicated that the country has 600,000 tonnes of maize ready for export. Current reports indicate that Zimbabwe is already importing from Malawi and Zambia while South Africa has already exported to Botswana, Lesotho, Namibia, Swaziland, Mozambique, Mauritius and Zimbabwe among other countries.

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

Revised assessments indicate continued deficits in wheat, rice and sorghum/millet of 2.89 million tonnes, 0.67 million tonnes and 0.46 million tonnes respectively. The Region relies on imports to cover its deficits in these commodities. As is indicated in Graph 1 the Regional maize surplus has been increasing during the past 3 years while wheat deficit has remained high and increasing.



III. REGIONAL VULNERABILITY ASSESSMENTS

The number of people requiring food and non-food assistance in the eight SADC countries where vulnerability assessments were conducted for the 2010/11 marketing year has been revised downwards from 4.04 million people reported in August 2010 to 3.10 million. This is due to new assessments in Malawi, Mozambique and Tanzania.

Revised vulnerability assessments from Malawi indicate that some 508,089 people are now estimated at risk requiring humanitarian assistance, down from the initial forecast of 1.1 million in April 2010. The initial forecast was based on higher food prices that were expected at that time than had actual occurred by October

2010. Similar downward revisions have been made in Mozambique and Tanzania with numbers reducing from 450,000 and 717,896 to 350,000 and 432,530 people respectively (Table 2).

Country¥	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11
Lesotho	270,000	948,300	541,000	245,700	553,000	353,000	450,000	200,000
Malawi	400,000	1,340,000	5,055,000	833,000	63,200	673,498	147,492	508,089
Mozambique	659,000	659,000	801,655	240,000	520,000	302,700	281,300	350,000
Namibia	n/a	n/a	n/a	n/a	n/a	n/a	224,795	106,297
Swaziland	217,000	600,400	634,400	465,900	345,000	238,600	262,000	160,989
Tanzania*	844,333	686,356	848,019	995,433	581,974	780,416	717,684	432,530
Zambia	60,000	39,300	1,232,700	380,537	440,866	444,624	110,000	53,629
Zimbabwe	5,422,600	2,300,000	2,884,800	1,392,500	4,100,000	5,100,000	1,400,000	1,287,937
Total	7,872,933	6,573,356	11,997,574	4,553,070	6,604,040	7,892,838	3,593,271	3,099,471

Source: SADC FANR Directorate - Member States Vulnerability Assessment.
¥Data is only available from countries with Vulnerability Assessment Committees.

Table 2: Trends in Population requiring Humanitarian Assistance

Table 3: SADC
ALL CEREALS BALANCE SHEET
MARKETING YEAR (Vary by Country) 2010/2011
Thousands of Metric Tons

	Ang	Bot	Les	Mal	Mau	Moz	Nam	RSA	Swa	Tan	Zam	Zim	SADC
A. Domestic Availability	**1256**	**139**	**207**	**3761**	**7**	**3047**	**181**	**18438**	**84**	**7396**	**3433**	**1538**	**39488**
A.1 Opening Stocks	**78**	**85**	**70**	**189**	**5**	**406**	**25**	**3203**	**9**	**301**	**356**	**4**	**4732**
Formal/SGR	71	65	63	131	5	278	25	3203	9	90	353	4	4297
On Farm	7	19	7	31	0	128	0	0	0	211	3	0	406
Other	0	1	0	28	0	0	0	0	0	0	0	0	29
A.2 Gross Harvest	**1178**	**55**	**137**	**3572**	**2**	**2641**	**155**	**15235**	**75**	**7095**	**3078**	**1534**	**34756**
B. Gross Domestic Requirements	**2202**	**334**	**357**	**2608**	**308**	**3522**	**319**	**14749**	**150**	**7041**	**2063**	**2269**	**35922**
C. Desired SGR Carryover Stocks	**24**	**85**	**12**	**30**	**10**	**150**	**49**	**1766**	**8**	**150**	**200**	**60**	**2544**
D. Domestic Shortfall/Surplus	**-970**	**-280**	**-163**	**1123**	**-311**	**-625**	**-187**	**1923**	**-73**	**205**	**1170**	**-790**	**1022**
E. Commodity Cross Substitution	**0**	**0**	**0**	**0**	**0**	**67**	**0**	**0**	**0**	**986**	**0**	**0**	**1053**
F. Imports	**0**	**312**	**230**	**0**	**0**	**830**	**173**	**1886**	**78**	**73**	**0**	**0**	**3582**
F.1 Received	**0**	**173**	**13**	**0**	**0**	**0**	**19**	**0**	**0**	**73**	**0**	**0**	**278**
Commercial	0	173	13	0	0	0	19	0	0	61	0	0	266
Food Aid	0	0	0	0	0	0	0	0	0	12	0	0	12
F.2 Expected	**0**	**139**	**217**	**0**	**0**	**830**	**154**	**1886**	**78**	**0**	**0**	**0**	**3304**
Commercial	0	139	217	0	0	830	154	1886	74	0	0	0	3300
Food Aid	0	0	0	0	0	0	0	0	4	0	0	0	4
G. Exports	**0**	**4**	**0**	**0**	**0**	**160**	**0**	**1989**	**0**	**0**	**80**	**0**	**2234**
Committments Shipped	0	0	0	0	0	0	0	0	0	0	0	0	0
Committments Not Yet Shipp	0	4	0	0	0	160	0	1989	0	0	80	0	2234
H. Import Gap	**-970**	**0**	**0**	**0**	**-311**	**0**	**-14**	**0**	**0**	**0**	**0**	**-791**	**0**
I. Forecasted Closing Stock	**0**	**113**	**79**	**1154**	**0**	**262**	**35**	**3585**	**12**	**1414**	**1290**	**0**	**5967**