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FEWS NET Executive Overview of Food Security
September 24, 2008

FEWS NET
FAMINE EARLY WARNING SYSTEMS NETWORK

FEWS NET overviews

For an analysis of conditions in Southern Africa, see back page

ETHIOPIA: While the start of the green harvest in crop producing areas has modestly improved food security, southern and south-eastern Ethiopia remain highly to extremely food insecure following successive below-average rains, water shortages, crop failure, high food prices, and security-related restrictions in Somali region. Critical levels of acute malnutrition continue to be reported in these areas, while shortfalls in humanitarian aid are limiting emergency response during the July-September hunger season.

HAITI: Four major storms in August and September destroyed as much as 30 percent of winter season crops in some areas, as well as homes and infrastructure. The subsequent reduction in food availability will exacerbate existing food access problems related to high prices, particularly in urban and coastal areas, and in chronically food insecure parts of the Northwest Department. Humanitarian aid is needed immediately, as is long-term assistance to rebuild infrastructure, restore farmland, promote foreign investment, and increase agricultural productivity.

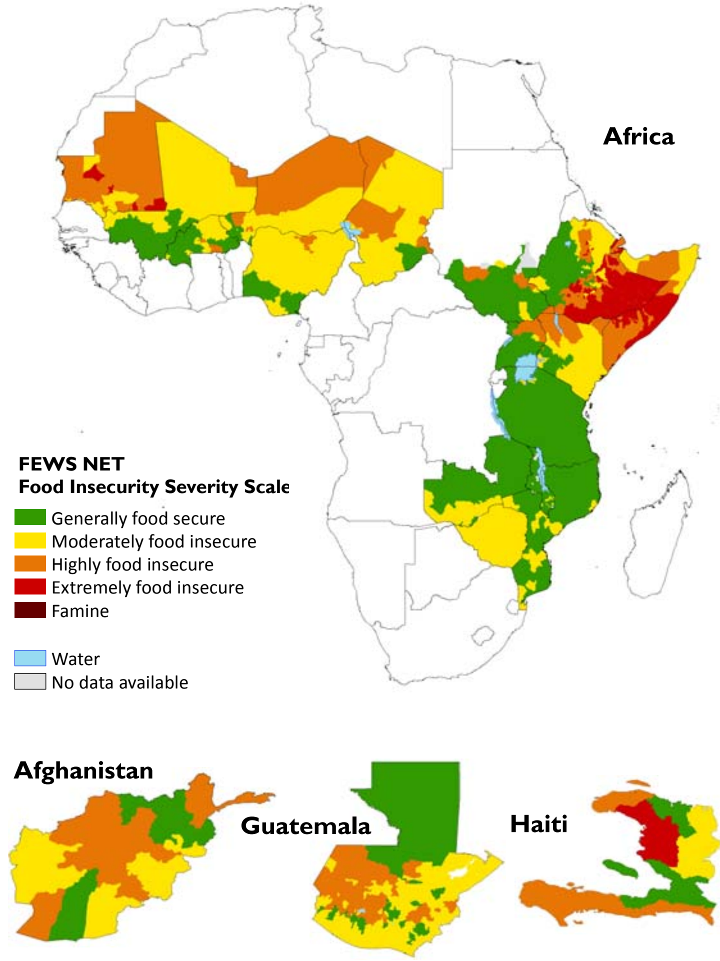
KENYA: About 1.38 million rural people (including IDPs) are highly food insecure and, without assistance, will be unable to meet their minimum food requirements at least through March 2009. Moderate food insecurity exists across the rest of the country, except in the southwest. An unfavorable forecast for the October-December rains over northern and eastern pastoral areas suggests that food security is likely to deteriorate by early 2009. Primarily due to high prices, at least 2.5 million urban poor are highly food insecure.

SOMALIA: Protracted and escalating civil insecurity, hyperinflation, and consecutive below-normal rainy seasons have caused extreme and deteriorating food insecurity, particularly in central and southern areas. Intensifying conflict has led to record levels of displacement, significant market and trade disruptions, competition for pasture and increasing limitations on humanitarian access.

WEST AFRICA: The end of the hunger season has been marked by a gradual improvement in food availability, as excess stocks are released and some early-harvested crops arrive on markets. Although localized flooding has damaged some crops and infrastructure, overall rains have improved crop conditions, water availability, and pasture, and bode well for average to above-average harvests. In most countries, food and non-food prices remain high; but conditions should improve in the coming weeks as harvests progress.

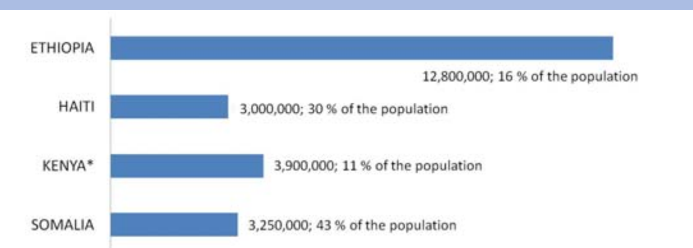
Current estimated food security conditions

July to September 2008



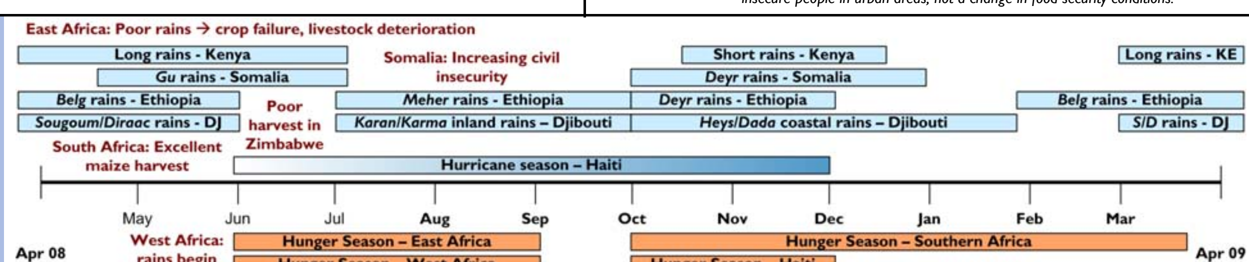
These maps show the highest estimated severity of food insecurity in each area, based on the latest assessment and monitoring data as well as baseline data and analysis.

Selected food insecure populations



* *The change in this figure between the August and September EOBs reflects the addition of 2.5 million highly food insecure people in urban areas, not a change in food security conditions.*

Critical events timeline



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FEWS NET FAMINE EARLY WARNING SYSTEMS NETWORK

FEWS NET Executive Overview of Food Security
Special Focus: Southern Africa September 24, 2008

Increasing food insecurity anticipated despite above-average harvest

Despite above-average 2007/08 harvests in southern Africa, the number of chronically and acutely food insecure people in the region is expected to grow to almost 8.5 million between now and the next harvest, in March 2009. The largest needs are expected in Zimbabwe, where 5.1 million people are likely to be food insecure by early 2009, southern Malawi (1.49 million people), and Mozambique (843,000 people). In the short term, intensified imports, improved food distributions, and access to agricultural inputs are needed in Zimbabwe. Assistance is also required for households in Malawi and Mozambique affected by crop failures and recent fires. Investments to address chronic food insecurity are also vital to prevent further increases in needs.

Table 1. National VAC-estimated food insecure populations[1]

Country	2006/07	2007/08	2008/09
Lesotho	245,739	553,000	353,000
Malawi	833,000	63,200	1,490,100
Mozambique	121,542	520,000	843,294[3]
Swaziland	465,890	345,012	238,625
Zambia	0	440,866	444,624
Zimbabwe	1,392,548	4,100,000	5,100,000[4]
Total	3,058,719	6,022,078	8,469,643

1/ Sourced from the 2006 and 2007 VAC reports and preliminary results as at 5 July 2008
2/Not separated from populations facing acute/chronic food insecurity
3/ Includes 302,664 assessed in the acute category, and 540,630 assessed to be chronically food insecure
4/As assessed by the FAO/WFP CFSAM in May 2008

Although localized flooding and dry spells were evident across the region during the 2007/08 season, cereal production this year was particularly good in South Africa (2.75 million MT surplus), and average to above-average in Malawi, Mozambique, BLNS countries, Zambia, and Tanzania. As a result, Malawi, Tanzania, and possibly Zambia will likely meet national requirements without formal imports. Deficits in other areas, including Zimbabwe — where production was 47 percent below the five-year average — and Mozambique, are projected to be filled by commercial imports and humanitarian aid. However, chronic food insecurity, continued high food prices, export restrictions, natural disasters, and, in Zimbabwe, political and economic instability, will likely undermine the benefits of increased regional food production. In Malawi, for example, food access constraints have led to increased food insecurity despite a generally good harvest.

In combination with typical seasonal declines in household food stores, high food prices have persisted across the region due to the continued high cost of fuel and agricultural inputs. While prices decreased in some areas immediately after the harvest, they began to rise earlier than normal. For example, between May and August, nominal maize prices rose 24 percent in Zambia, 94 percent in Malawi, 46 percent in Mozambique, and 715 percent in Zimbabwe. These increases are larger than during the same period in 2007, except for Zimbabwe, where prices rose 789 percent between May and August. Prices across the region are expected to continue to rise through March 2009, when the green harvest is available. While high prices have benefited net producing households, they have limited food access for net consuming rural and urban populations, (the majority of poor households in the region). High prices may result in a longer hunger season this year, and they have slowed government purchases in Zambia and Malawi, limiting grain reserve replenishment.

High prices have also led to export restrictions in Malawi (rice and maize), Zambia (maize), and Tanzania (all cereals). While these restrictions have lowered prices in some places, like Tanzania, they have prevented neighboring countries from employing their normal means of addressing production deficits. For example, Kenya has only been able to procure 4,000 MT of maize imports from Tanzania, out of a requested 180,000 MT, and, in Zimbabwe, 97,000 MT of maize remain undelivered from April 2007 contracts with Malawi; these contracts are being renegotiated.

The regional rainfall forecast through March, released September 17 by the Southern Africa Regional Climate Outlook Forum , was generally favorable, although areas of concern exist. In northern Tanzania, for example, below-normal rainfall could compound the effects of a poor 2007/08 season, and in Zimbabwe, below-normal rainfall during the second half of the forecast period (January-March) is possible. In the past, low rainfall in Zimbabwe during these months would not have been problematic as crops would have been well-established. However, in recent years, delayed availability of inputs has resulted in later planting, making rainfall during this period more important.

Input availability is an issue in other parts of the region as well, especially given that fertilizer prices have risen significantly this year. While government subsidy programs exist in some countries (e.g., Malawi), they are unable to completely meet the needs of small farmers, and FAO-sponsored input fairs have been scaled down this year due to insufficient funding. Lack of access to inputs could lead to considerable reductions in area planted during the upcoming season and a shift by commercial farmers from maize towards higher value crops, like soybeans, both of which could mean smaller harvests next year.

While current food security conditions in the region are generally stable, action is needed to mitigate anticipated increases in food insecurity over the next six months. Most immediately, close monitoring of the impact of rising prices during the hunger season, accelerated food imports, and improved distributions in Zimbabwe, and mobilization of assistance for 302,664 flood-, drought-, and fire-affected people in Mozambique are required. Beyond these urgent needs, investment is needed to address growing poverty and chronic food insecurity in the region.