

### Highlights

- Most of Southern Africa experienced erratic rainfall, delayed start of rainy season and extended mid-season dry-spell from December to February which have wilted early planted crops in the region.
- In March 2018, significant rainfall was received in central and eastern parts of South Africa.
- The 'watch' status in southern Malawi, south-eastern Mozambique, western and southern Madagascar, and central and southern Zambia has deteriorated to 'poor'. The 'watch' status in Swaziland, north-eastern South Africa, and central Mozambique has improved to 'favourable'.
- Results from the April/May annual vulnerability assessments are expected at the end of June (see calendar on page 6).

### Background:

- Southern Africa is a drought-prone region. In the last five years, it has experienced drought conditions three times. Extreme events are becoming more frequent and severe in the region.
- The region is characterized by structural issues (high poverty and inequality, HIV, stunting) which contribute to the high degree of vulnerability to shocks experienced by millions of people across the Southern Africa region.

### Current Situation

- A weak La Niña characterized by delayed start of season and erratic rainfall has been in existence since the start of the rainy season in October 2017.
- Dry conditions intensified in December 2017-March 2018, affecting early planted crops in southern Malawi, southern Zimbabwe, central and southern Mozambique, southwestern and southern Madagascar, northern parts of South Africa and southern half of Zambia (**Figure 1**).
- From late January to mid-February, heavy and persistent rains have been received in central and eastern parts of the region,

including Lesotho, northern Botswana, south-eastern Madagascar, southern Malawi, central and southern Mozambique, Zambia, and Zimbabwe (**Figure 1**).

- The recent rains will not benefit crops that have reached permanent wilting point; those that are not permanently wilted may recover, though some yield potential may have been lost. The rains will help in recovery of pasture and water supply for livestock. The erratic rainfall season has resulted in reduced planted area<sup>1</sup>, and moisture stress will curtail the expected yield and overall agricultural production.
- Crop conditions in southern Malawi, south-eastern Mozambique, western and southern Madagascar, and central and southern Zambia worsened in April compared to February, but improved in Swaziland, north-eastern South Africa, and central Mozambique (**Figures 2a and 2b**).
- Maize crop conditions in southwestern and southern Madagascar worsened; the entire maize cropping season could be a total failure.
- Fall Army Worm (FAW) infestation in nearly all countries across the region will

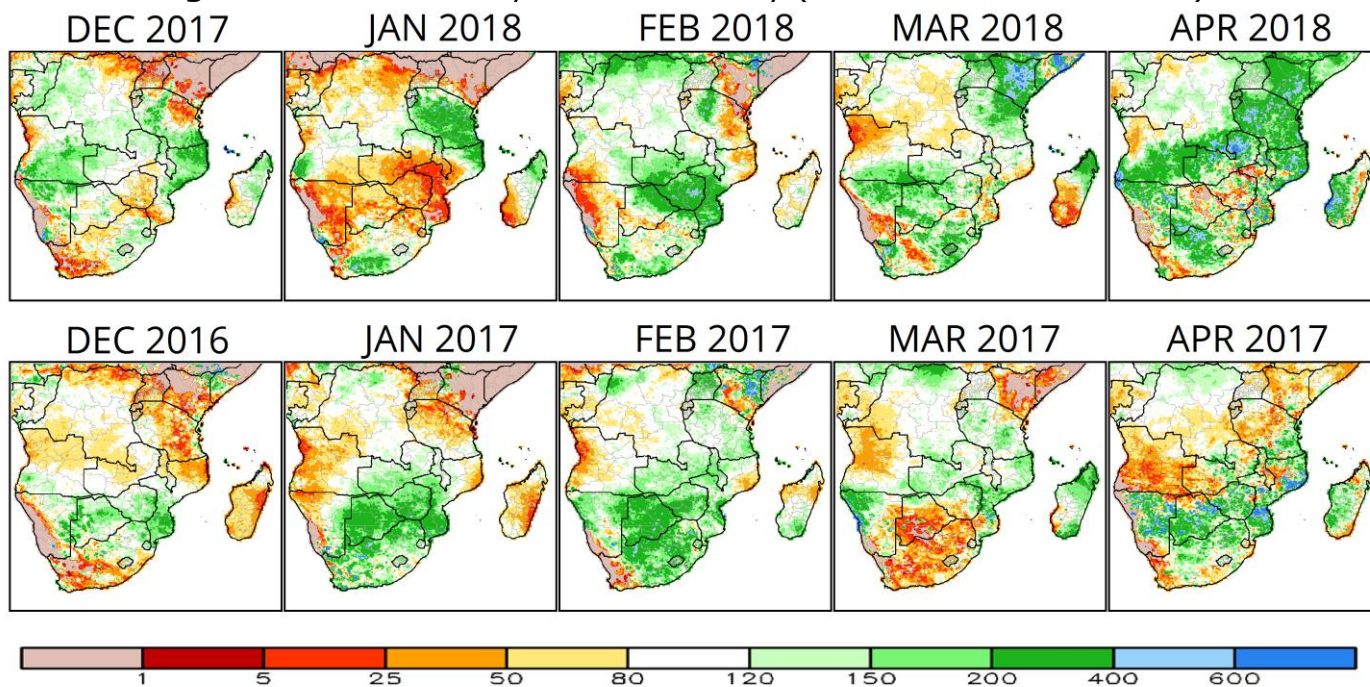
<sup>1</sup> For example, according to the Crop Estimates Committee of the Department of Agriculture and Forestry, the maize planted

area for South Africa is projected to decline by 12.2 percent, from 2.629 million ha to 2.309 million ha.

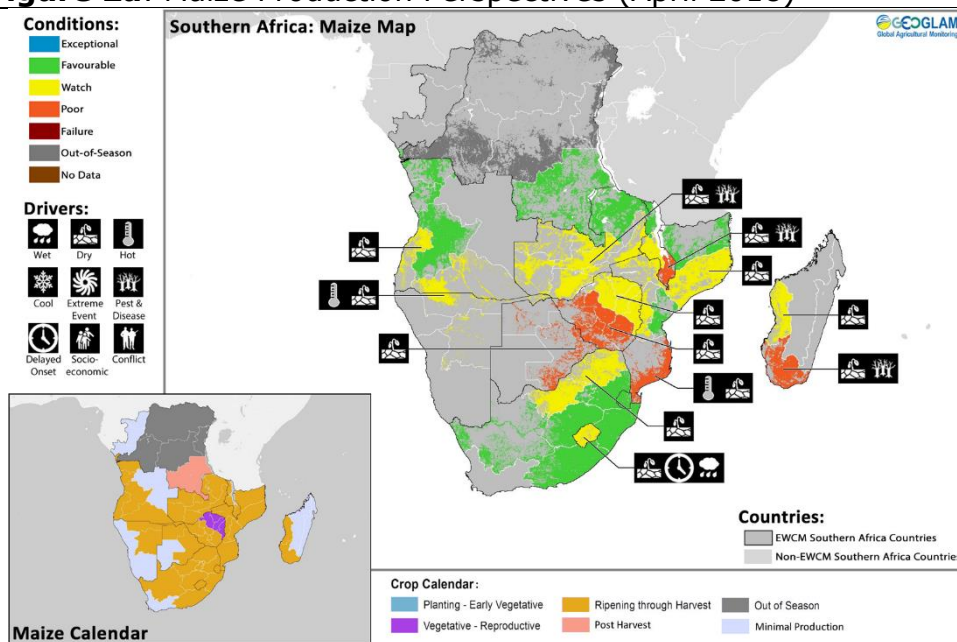
exacerbate the situation. FAW was first detected in 2017 and has spread over vast areas of Africa, including Southern Africa. The extent to which this invasive pest will impact food security in the region remains unclear, with effective control methods still lacking. However, there are efforts to model the impacts of FAW by FAO and a few other organisations.

- The conflict in the Democratic Republic of the Congo has expanded to new areas in the east and the centre of the country, leading to massive population displacement within DRC and in neighbouring countries. An estimated 4.5 million internally displaced persons with limited access to land and other productive assets will experience significant food shortages.

**Figure 1<sup>2</sup>:** Total Monthly Rainfall Anomaly (Percent of Normal Rainfall)



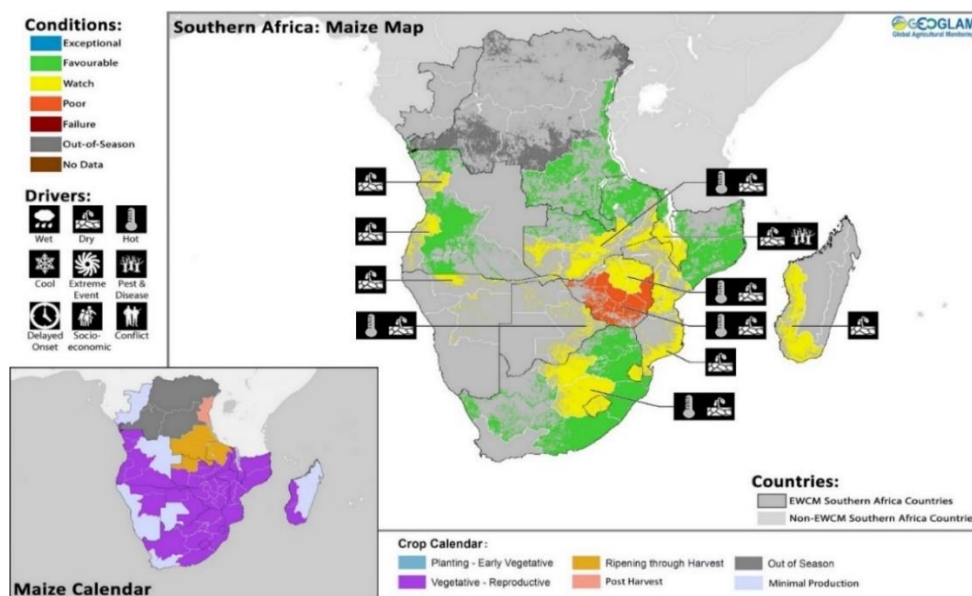
**Figure 2a:** Maize Production Perspectives (April 2018)



<sup>2</sup> Source:

<http://www.cpc.ncep.noaa.gov/products/international/safrica/safrica.shtml>

**Figure 2b: Maize Production Perspectives (February 2018)**



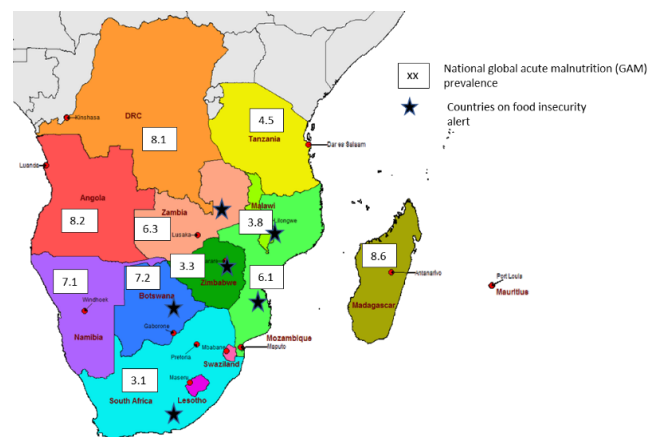
**Seasonal Expectation (April-June)**

- Wetter conditions are predicted from March to the end of the season in April but this is unlikely to significantly compensate for the production losses caused by protracted dry spells and high temperatures.
- The National Agricultural Council of South Africa estimated maize supply of 15.99 million tonnes in the 2018/19 marketing year, and demand (including exports) of 12.8 million tonnes.

**Nutrition**

- Most countries in Southern Africa have a stunting rate of above 30%, which is a serious public health concern. Some, such as DRC, Malawi, Madagascar, Mozambique and Zambia, have a stunting rate of 40% and above, which is considered very serious.
- The prevalence of acute malnutrition is below the emergency threshold, even though several countries record national wasting levels of above 5%. The highest national GAM prevalence is reported in Madagascar at 8.6% (**Figure 3**). However, there are pockets of high acute malnutrition (>10%) within Madagascar and Mozambique.
- A surge in prevalence of acute malnutrition and admissions to nutrition programs is currently not expected but cases are likely to emerge as we approach the peak of the lean season.

**Figure 3: Global Acute Malnutrition Prevalence**

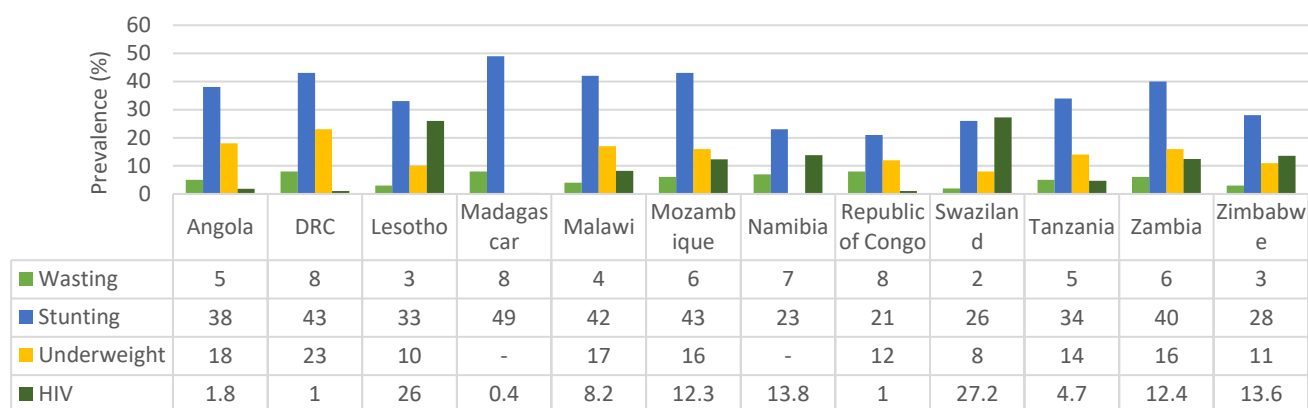


**Source:** Madagascar - IPC acute malnutrition, 2017; Mozambique - IPC acute malnutrition, 2017; The other countries - UNICEF-WHO-The World Bank: Joint child malnutrition estimates, 2017

- The Southern Africa region carries the highest burden of HIV, i.e. one-third of all people living with HIV worldwide. Therefore, the effects of adverse weather phenomena and FAW will increase the vulnerability of PLHIV/TB.

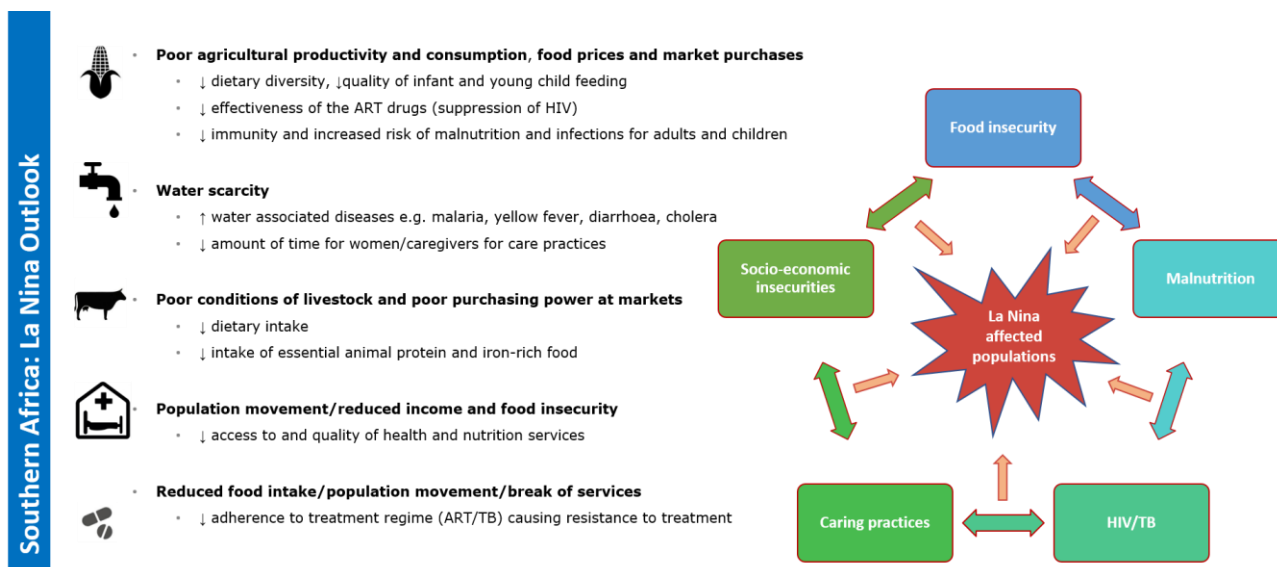
- Recent results from the SMART surveys show that undernutrition (wasting) among children under five for Malawi is at its lowest compared to previous assessments (1.3% GAM and 0.1% SAM), down from 4.3% GAM recorded during the same lean season last year. Minimum Acceptable Diet is currently estimated at 10.7%, down from 19% in May 2017. SMART surveys are currently underway in Zimbabwe, and several countries will also be conducting nutrition assessments in the coming months.
- Given that almost 513,000 children required treatment for severe acute malnutrition and 780,000 children required treatment for moderate acute malnutrition during the 2016/17 El Niño, partners are preparing contingency and nutrition response plans for an integrated approach to nutrition, encompassing both prevention and treatment of acute malnutrition.
- UNICEF and WFP are currently working closely together to a) update nutrition information (SAM and MAM), b) assess countries that are planning or have just completed surveys and c) compare nutrition trends from 2016 El Niño to forecast the possible nutrition outlook for the coming months.
- UNICEF, WFP and FAO will work on joint messaging on the emerging nutrition situation through the FNSWG and other interagency fora, and will begin coordinating response planning scenarios at the regional level.

**Figure 4: Malnutrition and HIV Prevalence**



**Source:** Nutrition data (stunting, underweight, wasting) - Global Nutrition Report 2017; HIV data - UNAIDS 2017 Estimates

**Figure 5: Potential Impact of La Niña on Nutrition and HIV**



## Resilience

WFP is working on a range of multi-year resilience activities using Food Assistance for Assets (FFA) as an initial platform to integrate support. Through FFA, the most vulnerable are able to meet their seasonal food needs through the provision of transfers, while at the same time build or rehabilitate productive assets that reduce the risk of disasters, strengthen livelihoods and build resilience over time. An example of this is increasing smallholder farmers' productivity through better natural resource management, including soil and water conservation, through its innovative integrated climate risk management approach.

The R4 Rural Resilience Initiative, based on four risk management strategies, enables the poorest farmers to access crop insurance by participating in risk reduction activities, including FFA, so that when a shock hits, compensation for weather-related losses prevents farmers from having to take desperate measures such as selling productive assets, and stimulates faster recovery. Combined with other measures such as access to savings, credit and reliable, timely and understandable climate information, it allows farmers to make better informed decisions to manage climate-related risks and to invest in riskier but more remunerative enterprises.

To make all these interventions sustainable in the medium term, the demand side of agricultural production needs to be stimulated. Thus WFP supports aggregation, processing, storage and purchase of surplus production through Purchase for Progress (P4P), which contributes to the establishment of a reliable market outlet, providing sustained prices for farmers' increased production. In the long run, this will decrease the need for seasonal/conditional food assistance as smallholders will be able to produce their own food as well as protect and continue investing in their land, resorting only to the private market.

With this phased strategic approach in mind, WFP intends to use early warning information already available to anticipate, at least partially, emergency (unconditional) interventions that will have to be undertaken during the lean season, toward the end of 2018, and expand its resilience building initiatives being planned from June 2018 in those areas of Malawi, Zimbabwe, Mozambique and Madagascar, where the Water Resources Satisfaction Index (WRSI) analysis, undertaken by VAM, has already shown that the prolonged dry spell of December 2017-January 2018, will affect the results of the agricultural season. If necessary resources are available on time, food insecure populations will not be forced

to adopt negative coping mechanisms, compromising their ability to successfully start the planting season in October-November 2018.

For instance, in **Malawi**, food security analysis recommends resilience interventions for up to 3.1 million people, but currently WFP reaches around 725,000 beneficiaries through FFA, 57,000 through R4, and 60,000 farmers through P4P. To anticipate emergency lean season interventions, which would cover the food gap of vulnerable communities in areas where the maize production perspective might have been compromised by the occurrence of the dry spell, the CO is seeking multi-year funding for 2019 and beyond for the above caseload and to add 51,000 beneficiaries for FFA and 65,000 individuals for R4.

In **Mozambique**, the CO is reaching almost 365,000 beneficiaries through FFA following the last FEWS NET projections of districts that will be food insecure from June to September 2018, due to the partial failure of the agricultural season. According to FEWS NET, between 500,000 and 1,000,000 people will require assistance from September 2018 to March 2019. However, funds are still not available to the CO to cover the indicated caseload.

In **Madagascar**, WFP is implementing FFA initiatives in the south to cover the food gap of almost 400,000 beneficiaries. However, the food insecure population could increase by half a million people because of the compromised agricultural season, and the CO has no resources available to increase the number of beneficiaries.

Finally, in **Zimbabwe**, WFP is targeting 182,000 people through resilience building initiatives; 130,000 of them with FFA activities. These initiatives are implemented not only to cover the food gap and diversifying livelihoods, but also to assist communities to better adapt to climatic shocks through intensified application of the watershed management approach at household level. In areas where WFP is working, both prolonged dry spells and subsequent incessant rains, since beginning of February, will impact heavily on the final produce of the already marginalized communities reeling under harsh economic conditions. The FFA cycle will commence in May, yet funding level is still at less than 40%.

**Figure 6:** Calendar of upcoming assessments (as of 18 April 2018)

Notes	Country	Assessment	Category	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
	Lesotho	Market Assessment	Market												
	Lesotho	Annual VAA (rural and urban)	VA												
	Lesotho	IPC Acute	IPC												
	Lesotho	IPC Chronic	IPC												
	Lesotho	VAA Update	VA												
SMART TBC	Madagascar	Rapid Assessment	RA												
Markets TBC	Madagascar	Multi-sectoral Assessment	Multi												
	Madagascar	SMART	Nutrition												
	Madagascar	IPC Acute	IPC												
	Madagascar	IPC Acute FI	IPC												
	Madagascar	IPC Chronic	IPC												
	Madagascar	IPC Lessons learned	IPC												
	Madagascar	CFSAM	CFSAM												
	Malawi	IPC Acute	IPC												
	Malawi	IPC Chronic	IPC												
	Malawi	IPC	IPC												
	Malawi	Market Assessment	Market												
	Malawi	Household Survey	HH												
	Malawi	Annual HEA VA	VA												
	Malawi	VAA Update	VA												
	Malawi	Markets Update	Market												
	Mozambique	Rapid Assessment	RA												
	Mozambique	IPC Acute	IPC												
	Mozambique	Annual VAA	VA												
	Mozambique	VAA Update	VA												
	Mozambique	Urban VA	VA												
	Namibia	FNSM survey (rural and urban)	FNS												
	Namibia	Markets	Market												
	Namibia	Annual VAA	VA												
	RoC														
	Swaziland	IPC Chronic	IPC												
	Swaziland	Annual VAA	VA												
	Swaziland	IPC Acute	IPC												
IPC Chronic TBC	Tanzania	Livelihood baselines	Livelihood												
	Tanzania	Comprehensive FNS	FNS												
	Zambia	Rapid Assessment	RA												
	Zambia	Annual VA	VA												
	Zimbabwe	Annual VA	VA												

## Country by Country Summaries

### Botswana

A dry spell was experienced across the entire country between December 2017 and January 2018, with some rains received in north-western areas in February 2018. A total of 5,190.62 ha has been planted compared to 56,000 ha the same time last year.

Most rain-fed crops countrywide show signs of wilting while some areas show slight resilience. Late planted crops have not yet reached vegetative stage. The available grazing pastures are insufficient and will not sustain livestock for the next 3 months. However, more rainfall was received in February and March which is expected to improve pasture conditions.

## Democratic Republic of Congo

**Current situation:** Political uncertainty persists and widespread violence is reported in several provinces. The security situation is deteriorating in the Kasai and ethnic conflict is on the rise. The Forces Armées de la République Démocratique du Congo (FARDC) has reportedly launched a large-scale operation to reinforce their control over the Kasai region. UNHCR warns about the escalating violence in Ituri province in north-eastern DRC.

Food prices in January for the majority of products were high in Kasai, Kwango, Haut-Lomami, Tanganyika, Haut-Uele, and Mai-Ndombe, according to the Food Security Cluster. In 51 percent of the territories, households could not afford a corn-based food basket. In 37 percent of the territories, households could not purchase a cassava food basket. Access to these two food baskets is very difficult in Kasai and Tanganyika.

Furthermore, the cost of the agricultural work day has decreased by 6 percent, which has a negative impact on the purchasing power of households.

**Economic situation:** The Congolese franc has fallen more than 60 percent against the US dollar since October 2016. This complicates the government's de-dollarization policy as anecdotal evidence suggests that more and more actors are choosing to price goods in US dollars rather than the local currency. Inflation was roughly 60 percent in December 2017.

## Lesotho

**Current situation:** From late February into the first two weeks of April, above normal rains were received countrywide. Heavy rains and hailstorms were experienced, particularly in the Quthing- Mount Moorosi area which resulted in loss of lives, as well as damage to infrastructure and livelihoods. Starting from early April, temperatures dropped, causing frost in the highland areas. Sparse snowfall was also experienced in March.

**Crop production:** Per the preliminary findings of the crop assessment (March 2018), most fields, especially in the lowlands, were planted in November-

December, which was later than the recommended period of October-November. Area planted has been reduced due to absence of government-led block farming this year. The crops ranged from vegetative to tasselling stages, with most crops stunted. Overall, lower production is expected compared to the previous year. In addition, crops in the highlands, specifically maize and beans, have been affected by frost and snow before fully maturing. Prolonged heavy rains experienced in March and April have disrupted harvesting of beans, thereby causing further damage.

**Last seasonal performance:** Lesotho's cereal requirements amounted to 349.8MT in 2017/18. Domestic production contributed a total of 238.362MT, leaving an estimated shortfall of 58.847MT after factoring in the opening stock of 52.591MT. However, planned imports were able to cover this shortfall, leaving no uncovered food gap. The number of food insecure people in 2017/18 in rural areas was estimated at 224,000, which was a decrease from 679,000 estimated in 2016/17.

**Economic situation:** GDP grew an estimated 4.6% in 2017. GDP growth is projected to moderate slightly to 4.3% in 2018 as mining growth drops, and to 4% in 2019. Inflation decelerated from 5.8% in January 2016 to an estimated 5.3% in January 2017. This was in tandem with drops in food prices as domestic production in the region recovered from the carryover effects of the dry El Niño weather conditions. Prices of maize have fallen due to declining prices in South Africa.

## Madagascar

**Current situation:** The northern regions received above average rainfall since January 2018, with some occurrence of floods. However, the southwestern and southern parts suffered dry conditions until late March. Tropical cyclones Ava and Eliakim hit the eastern areas in January and February, causing flooding in planted rice fields, damage to infrastructure and displacement of people.

The household food security situation remains fragile. Following the dry spell during the 2016/2017 cropping season, the decline in cereal and tuber production led to an increase in price for most food

commodities. More than 500,000MT of rice was imported in 2017, the largest quantity in the past 10 years, to stabilize the prices of both local and imported rice on the market from November 2017 to March 2018, particularly in deficit areas.

Since January 2018, rice prices have remained 20% higher than last year and 35% above the 5-year average. Maize prices have increased as a result of the dry spell from the beginning of the year in southern regions, while prices of tubers remain stable.

For the Great South (south-west and south), in general, although rainfall was quite good in November 2017, a dry spell has settled since January 2018 (crucial time for flowering phase of crops), leading to crop failure.

**Last seasonal performance:** The 2016/2017 domestic rice production is estimated at 3.1 million MT in 2017, 21 percent lower than the 5-year average and 19 percent lower than the last agricultural season. National maize production is at around 281,000MT, which is 11 percent lower than last year and still below the 5-year average of 368,000MT. National production for cassava is at 2.6 million MT, which is 15 percent below the 5-year average and 3 percent lower than during the 2015/2016 campaign.

**Economic situation:** Economic growth has been estimated at about 4 percent despite two natural disasters: a serious dry spell affecting approximately 1.14 million people in the southern regions, and cyclone Enawo, the worst to strike Madagascar in 13 years, resulting in economic losses estimated at US\$400 million (roughly equivalent to 4 percent of GDP). In addition, given that 2018 is an election year, national economic growth may be affected.

## Malawi

**Current season:** The southern part of the country, consisting of 13 districts, faced extremely dry conditions in December-January, and most maize crops in these areas have wilted beyond recovery. Some districts in the central region, which is the main source of maize, were also affected by dry conditions. The Ministry of Agriculture reported in February that dry spells and

FAW are expected to reduce production by 283,941MT this production season. Most climate models indicate that between April and June 2018, a transition from La Niña to ENSO-neutral conditions is likely. Thus, the rainfall forecast for April-June 2018 is that most parts of Malawi are likely to experience normal cumulative rainfall amounts.

On 5 February, the government issued an export ban in view of the prevailing dry spells and FAW (which affected 26% of planted areas in January). Currently, the harvest season is in progress for most parts of Central and Southern Regions, resulting in a decline in maize price by 22 percent from February to the second week of April. The average price was MWK91/kg in the second week of April, which was 37% lower than that of the same time last year and a further 27% lower than the five-year average. The availability of grain at the household level is expected to continue throughout the harvest period, from April to June. Based on seasonal trends, national average prices are expected to continue declining until June. Thereafter, prices are likely to pick up slowly, but will remain subdued in the third quarter assuming no change in government policy on maize trade and related products as well as insignificant informal outflows.

**Last seasonal performance:** Approximately 1,043,000 people were food insecure in 2017/18 at the peak of the lean season. In terms of seasonal production, Malawi registered a minimal surplus of 305,000MT, which is only equivalent to roughly 9 percent of the national maize requirement.

**Economic situation:** The Central Bank projects that the headline inflation will average 10.5% in 2018, and is expected to close the year at around 9.5%. The economic growth outlook for 2018 has weakened mainly due to the impact of dry spells, Fall Army Worms, and intermittent power supply. March headline inflation stands at 9.9%, compared to 15.8% at the same time last year. Food inflation for the reference period slowed down to 7.3% compared to 17.5% at the same time last year. The Malawian kwacha-US dollar exchange rate has remained fairly stable for over a year, now trading at MWK726 per dollar. Based on seasonal trends, the



kwacha is expected to appreciate against major currencies until the third quarter as the tobacco marketing season begins in April.

### Mozambique

**Current situation:** Southern and central Mozambique experienced early season abnormal dryness, while the northern areas experienced high rainfall. Even though many northern areas showed good crop conditions, the heavy rainfall in some districts led to a loss of 5,202ha of cropped area. In addition, FAW was reported across the country.

**Last seasonal performance:** About 313,400 people were estimated to be food insecure. In terms of production, Mozambique reported a maize surplus of 800,000MT in the last season. The total requirements for maize in Mozambique is approximately 2.3 million MT.

**Economic situation:** Small-scale farmers have experienced an economic set-back due to reduced exports of pigeon peas, which is likely to reduce income and slow down economic growth. Mozambique exported more than 170,000 tonnes of pigeon peas, worth over USD120 million in 2016-2017. It is further estimated that approximately 1.5 million Mozambican farmers were involved in pigeon pea cultivation in 2017, producing more than 200,000 tonnes.

Strong commodity export performances partly helped to stabilise the metical and bring inflation down in 2017.

### Namibia

**Current situation:** Most parts of the country received poor rainfall, in sporadic and erratic patterns and frequent dry spells. However, in March-April, there was increased rainfall, and river levels are rising. Floods are expected in the northern areas.

Crop germination is good and most crop producing regions recorded improvements in the expected crop harvest. There are favourable crop growing conditions prevailing for the remainder of the season, however, the provisional forecast for the cereal harvest is 1% lower than last season's harvest, but 12% above-average production.<sup>3</sup>

Despite wheat imports, there is uncovered deficit for maize and millet/sorghum, a shortage of 66,400MT and 19,000MT, respectively. The uncovered deficit is expected to be covered by commercial imports.

**Last season performance:** Livestock body conditions were reported to range between fair and good. Grazing continues to deteriorate in various parts of the country amidst poor rainfall performance in the first half of the season. Poor rainfall performance is said to have worsened the situation as much of the grazing has already been depleted, with water resources diminishing in various parts of the country.

By the end of October 2017, the country had a total cereal requirement of 348,000MT, which resulted in a total import requirement of 169,000MT.

**Economic situation:** The annual food inflation was 2.7% in March 2018 compared to 7.3% during the same period last year. The monthly food inflation slowed to 0.1% from 0.3% in the previous month. This has greatly improved purchasing power for households. The appreciation of the Namibian currency is an added advantage for households who depend mainly on markets to acquire food<sup>4</sup>.

### Republic of Congo

**Current situation:** The situation in the country remains stable for now, with uncertainty looming regarding both the political situation and the Pool crisis.

Per UNHCR, the country hosts around 50,000 refugees from the Central African Republic. Most of the refugees are in Likouala Province. Their food security is essentially supported by continued humanitarian assistance. Moreover, per the Government of the Republic of Congo, roughly 81,000 people have been displaced in the Pool and Bouenza departments following armed conflict escalation in these departments. This situation has undermined agriculture, hindered market access and disrupted local livelihoods in the region.

<sup>3</sup> MAWF, Namibia CROP PROSPECTS AND FOOD SECURITY SITUATION REPORT, March 2018

<sup>4</sup> Namibia Consumer Price Index, March 2018, NSA

**Economic situation:** According to the IMF, in 2018, the average inflation rate is forecast to further decrease to -1.1 percent, in part due to decline in global food prices.

### Swaziland

**Current situation:** Swaziland received less rainfall than predicted, and the rainfall it did receive was delayed. This resulted in farmers planting their fields later than usual while some farmers did not plant at all. Furthermore, high temperatures and prolonged dry spells were experienced in the south-eastern areas (Lowveld and Dry Middleveld). Other possible factors underlying poorer harvest prospects include delayed supply of farming inputs in government-supported programmes and an infestation of the FAW in the northern part of the country.

Food prices have remained relatively stable since the start of the season, despite maize prices having remained higher than the 5-year average. Observed increases in commodity prices i.e. fuel, water and electricity, will have a negative bearing on future overall food prices.

**Last seasonal performance:** In 2016/2017, Swaziland registered a considerable maize production of 84,000MT, which is equivalent to more than half of the annual country requirement of 120,000MT. However, the 2017 Swaziland Vulnerability Assessment Committee estimated that over 177,000 people, which represents 15% of the total population, will require food and livelihood support by the end of the lean season in April 2018.

**Economic situation:** The country's overall economic growth remains low, with annual growth estimated at 1.4% in 2017 and 2.3% in 2018. One significant factor is the reduction of SACU revenue, which is a major source of income for the country. The country continues to be faced with several social challenges, such as high poverty and inequality; high unemployment, especially among youth; gender disparities; and a high rate of HIV/AIDS which has increased vulnerability among the population.

### Zambia

**Current situation:** Most areas in the southern half of Zambia, which experienced prolonged dry spells and extremely high

temperatures at the beginning of rainfall season, are now under the influence of a strong intertropical convergence zone resulting in continuous heavy rainfall that has led to widespread flooding and water logging. With the overall improvement in rainfall across all areas that were earlier impacted by prolonged dry spells, most late planted crops, especially maize, have recovered tremendously. Despite this improvement, a drop of 30% is expected in the maize harvest.

Increased infestation of red locusts around the Kafue Flats area has been observed. Measures have been put in place through the International Red Locust Control Organization in collaboration with the Ministry of Agriculture to continue spraying. A rapid crop assessment in February found that government measures such as sensitization and provision of pesticides had limited the impact of FAW.

**Economic situation:** The price of the main staple (maize) has remained low, averaging ZMK1.50/kg, signalling that supply is still good. The year-on-year inflation rate has seen a slight reduction from 6.2% in January to 6.1% in February 2018. A similar trend was observed in the month-to-month inflation rates, with a 0.1 percentage point reduction (1% in January and 0.9% in February).

**Last seasonal performance:** Zambia registered a surplus of 1.75 million MT in the 2016/17 production year, some of which was exported to deficit parts of the region. Owing to the likely production shortfall of maize in the current year, it is expected that trade will be restricted with neighbouring countries to secure domestic supplies. Current stock levels of strategic reserves stand at over 600,000MT as of February. In 2017/18, approximately 77,000 were food insecure. The rapid crop assessment identified over 275,000 households requiring close monitoring in the 51 surveyed districts.

### Zimbabwe:

**Current situation:** Since November, most of the country has received erratic rainfall characterized by long dry-spells. While rainfall improved starting February 2018, most crops in the critical flowering stage in January did not receive sufficient rain. Area

planted with maize is 22% lower than last year. Anecdotal evidence from FEWS NET indicate that the south is bearing the biggest brunt, despite the northern crop producing areas having received less than 75% of their normal rainfall.

While prices have been relatively stable, in mid-January, the price of maize increased by 7% and maize meal by 26% in markets monitored by Zimbabwe CO in 11 districts; this situation is typical during the peak of the hunger period.

From February to May 2018, Zimbabwe is projected to be between IPC Phase 2 and Phase 3. This could intensify with the unfavourable cropping conditions.

**Last seasonal performance:** It is estimated that Zimbabwe produced

approximately 2.444 million MT of maize, with a requirement of 1.547 million MT. Roughly 1.05 million people were food insecure at the peak of the 2017/18 lean season.

**Economic situation:** Although there has been a change in the political situation, cash liquidity issues continue to hinder purchases. A multi-tier pricing approach dependent on the mode of payment is used in Zimbabwe, whereby the use of the bond note and mobile money are attracting a premium, which reduces the purchasing power especially of poor households who have no access to US dollars. Market prices remain unusually stable due to low demand associated with the liquidity crisis.