Southern Africa Season 2019-20

November 2019

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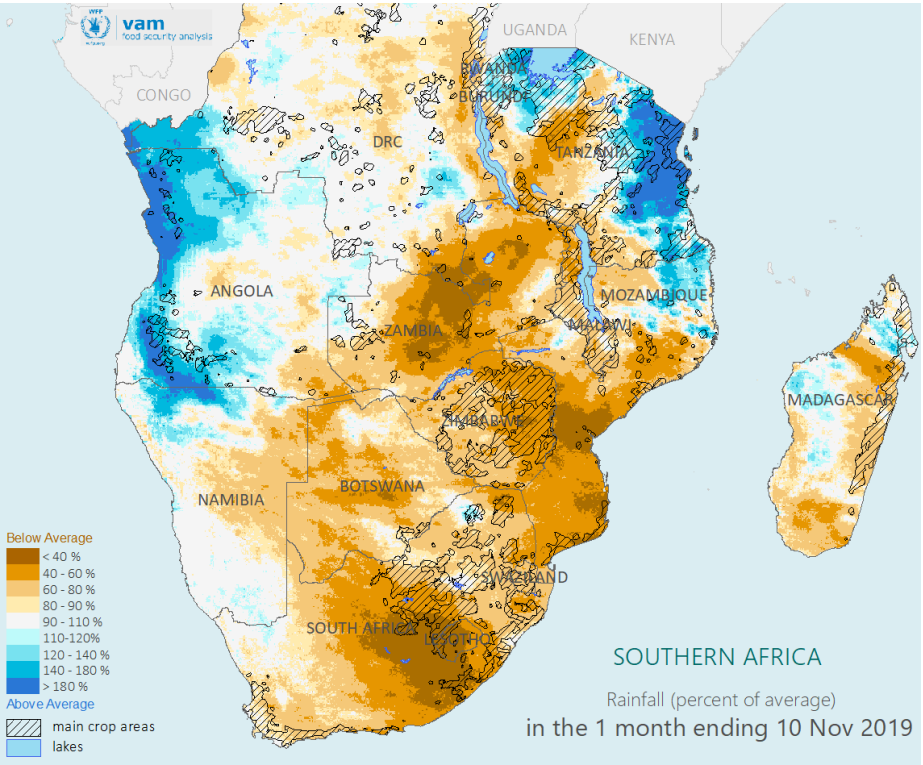
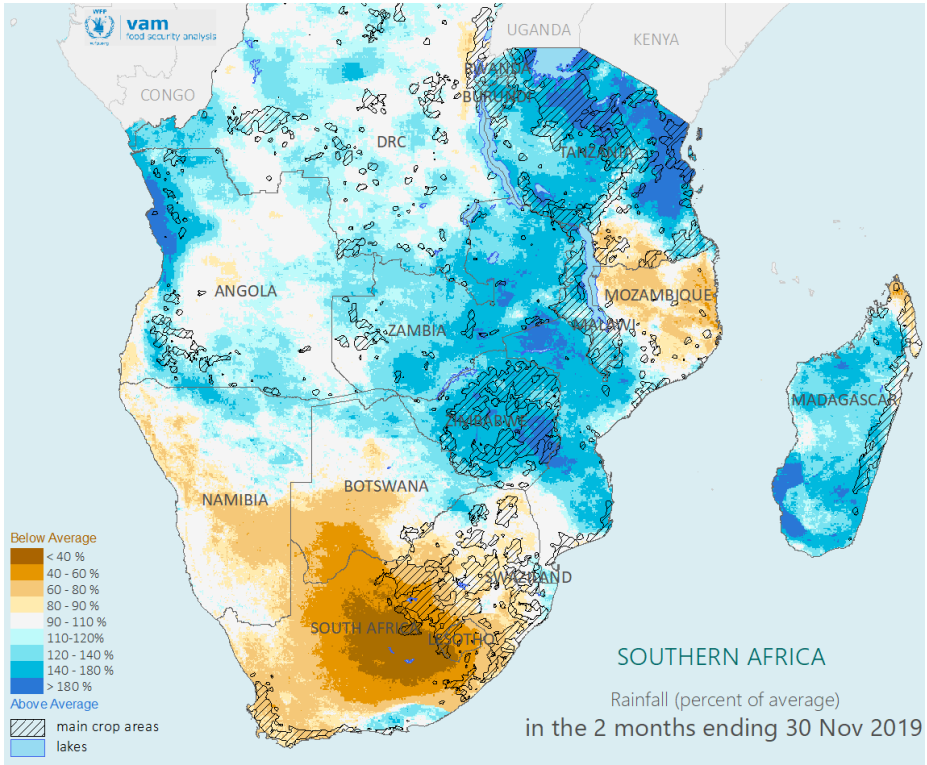
vam food security analysis

Highlights

- Until early November, the current rainfall season has been characterized by much drier than average conditions, leading to delays in the onset of the agricultural season. From mid November, rainfall has improved significantly and these improved conditions should last until the end of the month; this will lead to suitable conditions for planting and early crop development, but drier conditions are likely to return from early December.
- The poor performance of the previous rainfall season of 2018-19 across many areas of the region led to significant shortfalls in maize production across Zambia and Zimbabwe. Only South Africa, Tanzania, Zambia and Malawi are able to meet cereal requirements for 2019-2020. As a result, maize prices have risen earlier than usual and are now above the 5 year average. Maize prices in half of the monitored markets in the region are in crisis status.
- Over 11 million people are now experiencing "crisis" or "emergency" levels of food insecurity (IPC Phases 3 and 4) in nine countries: Angola, Zimbabwe, Mozambique, Zambia, Madagascar, Malawi, Namibia, Eswatini and Lesotho.
- Forecasts for the current season uniformly predict drier than average conditions for most of the region, particularly for Zimbabwe, Zambia and Mozambique. If this pessimistic outlook is verified, these countries will face a second consecutive poor seasonal performance with likely impacts on national crop production.
- Given the uniformity and convergence of outlook in the seasonal forecasts from all main forecasting centres (ECMWF, NOAA/CPC, IRI, SADC), the most likely scenario is for a worsening of food insecurity conditions across the region.

Current Seasonal Status - November 2019

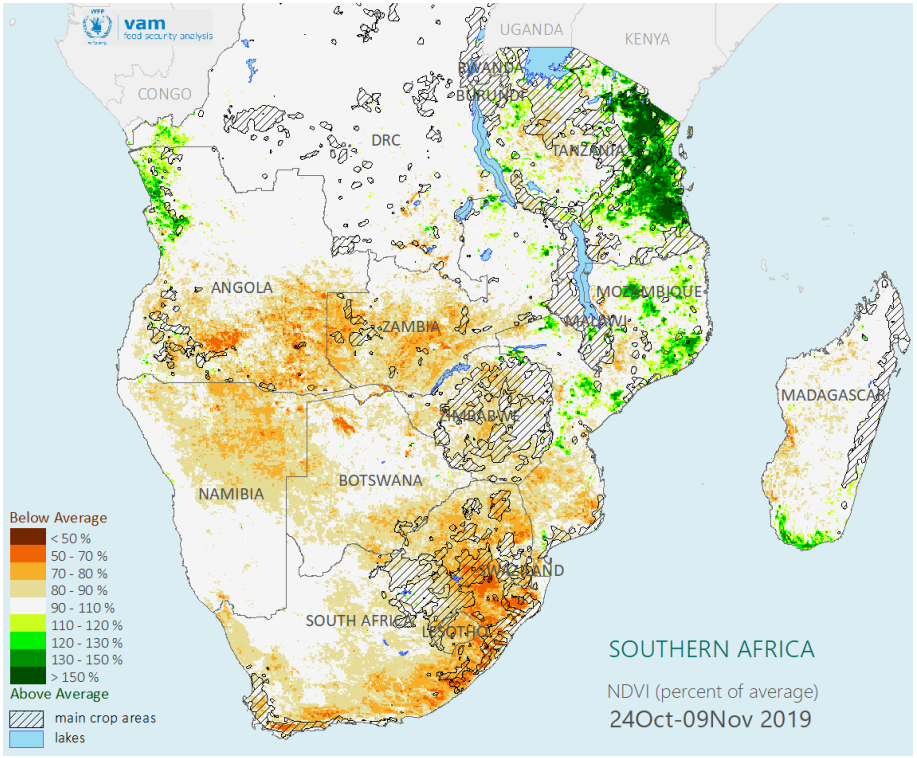


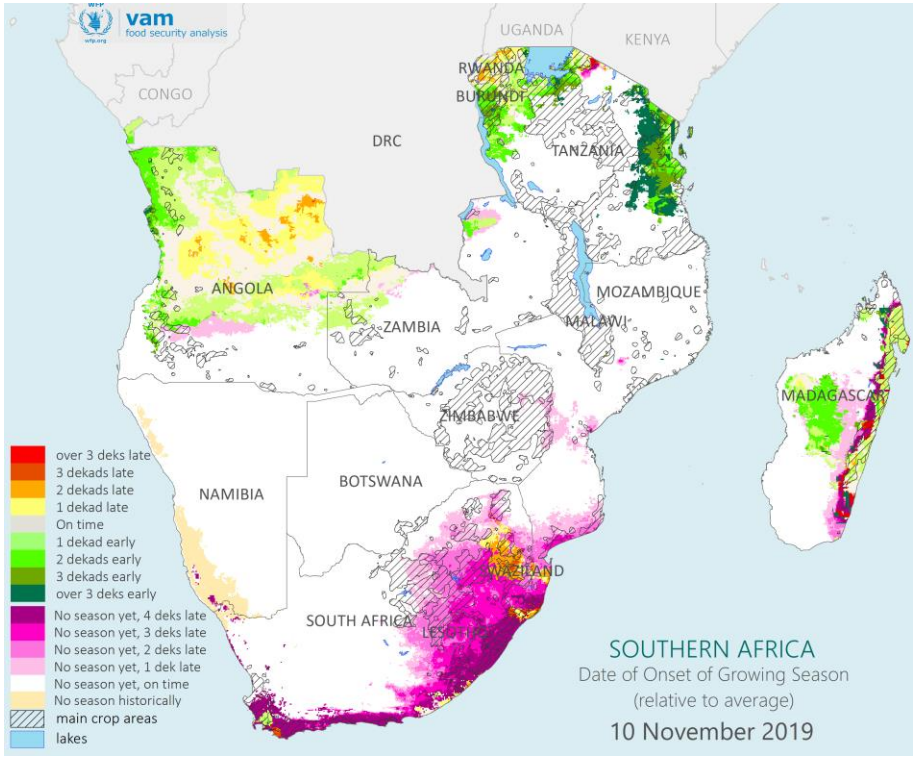


The early season in Southern Africa has been characterized by much drier than average conditions, which have extended until early November. This led to considerable delays in the start of the growing season in areas such as NE South Africa and southernmost Mozambique.

Recently, from the second week of November onwards, much wetter conditions have prevailed and are forecast to continue up to late November. This will overturn the rainfall deficits that prevailed before and lead to suitable conditions for planting and early crop development: based on these short range forecasts, the map on the right shows wetter than average conditions by end of November across most of the region, except for South Africa, parts of Namibia and Botswana and northern Mozambique.

Current Seasonal Status - November 2019





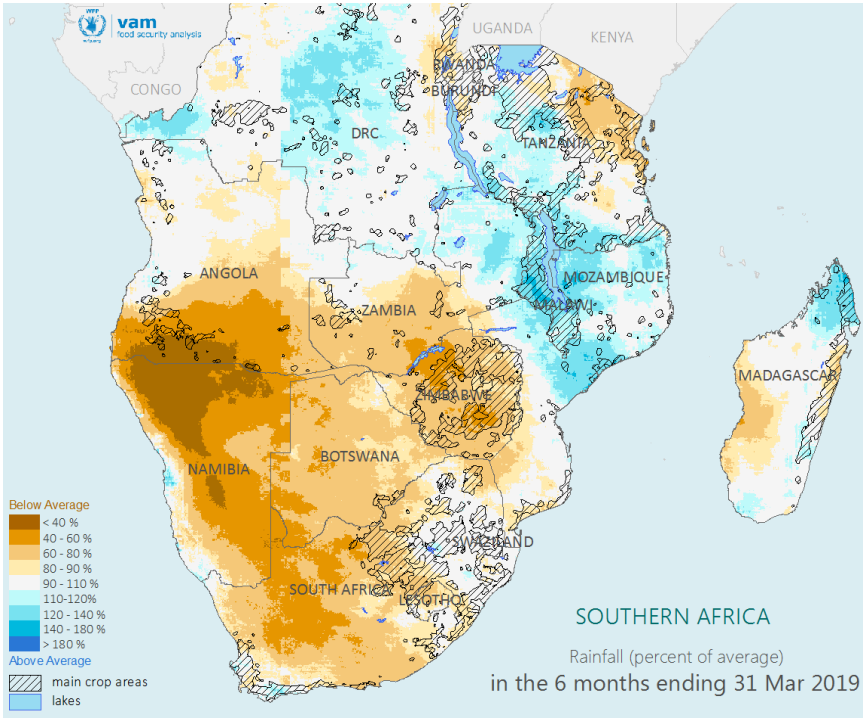
The impacts of early season rainfall deficits upon vegetation development are fairly evident in NDVI images of early November.

We can see areas of reduced vegetation cover extending from eastern South Africa, Lesotho, Eswatini, southern Mozambique, part of Zimbabwe and Zambia in tight correspondence with rainfall deficit patterns up to November 10.

As a consequence of poor early season rainfall, there are delays in the start of growing season, so far confined to eastern regions of South Africa, Lesotho, Eswatini and extreme south of Mozambique where a delay of 20-30 days is detected.

If the short term forecasts presented in the previous slide are accurate, and mid and late November are wetter than average, we expect a broadly timely start of the season across the region. Close monitoring of the start of season is therefore recommended.

Context: Previous Season Crop Production



The previous season in Southern Africa was characterised by significant rainfall shortages in large areas of the region as shown in the map left.

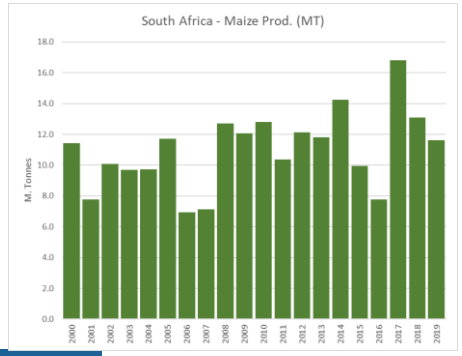
Zimbabwe and Zambia were hit hardest with national maize production in the last harvest suffering a reduction of about 24% and 31% respectively (see plots and table) relative to the average of the last 5 years (source: FAO-STAT and FAO-GIEWS.

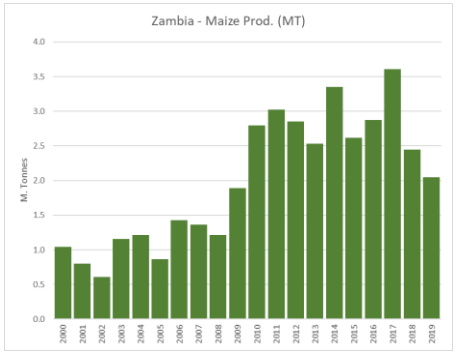
Overall for the region, only South Africa Malawi, Zambia and Tanzania will meet the current cereal requirements for the marketing year of 2019-2020.

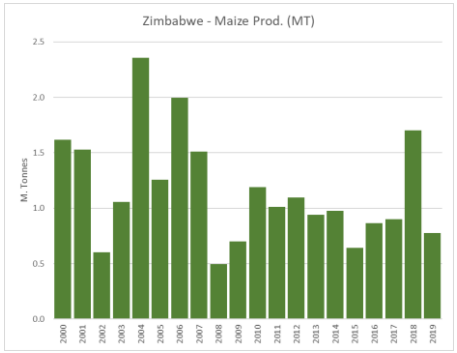
Over 11 million people are now experiencing "crisis" or "emergency" levels of food insecurity (IPC Phases 3 and 4) in nine Southern African countries: Angola, Zimbabwe, Mozambique, Zambia, Madagascar, Malawi, Namibia, Eswatini and Lesotho.

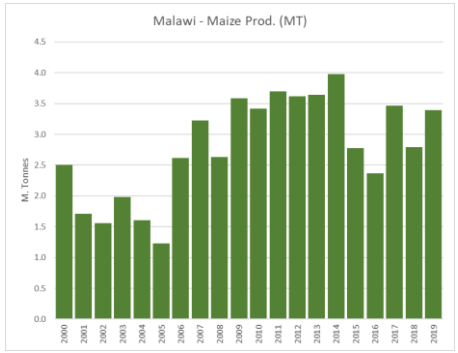
Country	5-yrs avg	2018-19	Ratio %
Malawi	3076	3392	10.3
Mozambique	1661	2085	25.5
South Africa	12382	11630	-6.1
Zambia	2978	2046	-31.3
Zimbabwe	1017	777	-23.6

2018-19 Maize production vs 5 year average (1000tons): Source; FAO



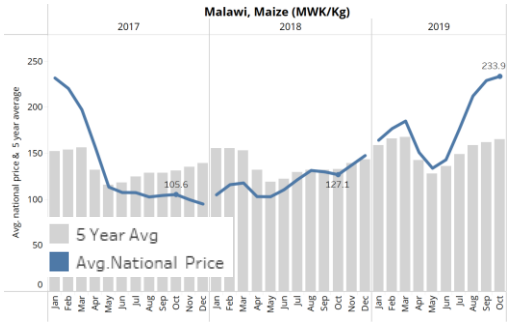


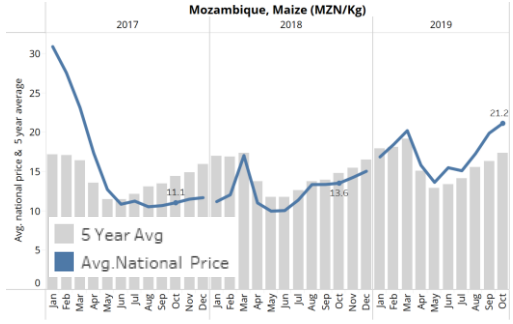


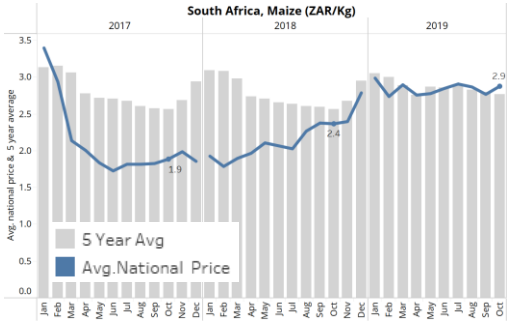


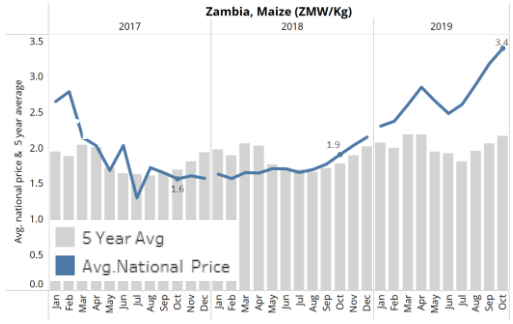
Maize production since 2000 (MTons). Source: FAO

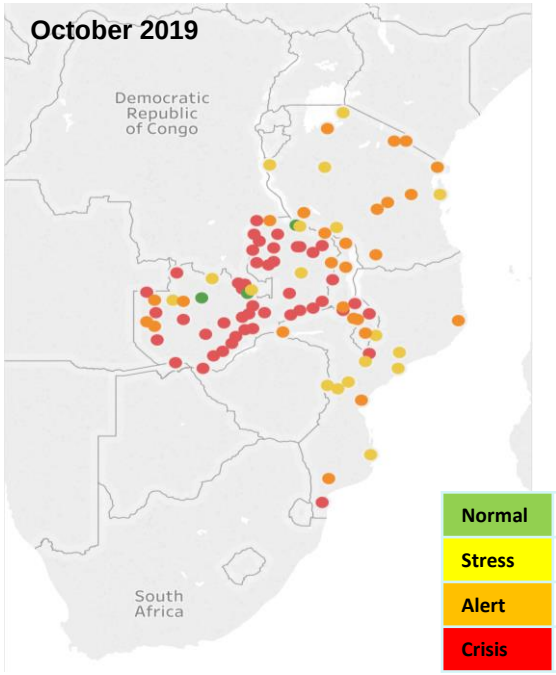
Context: Markets and Food Prices











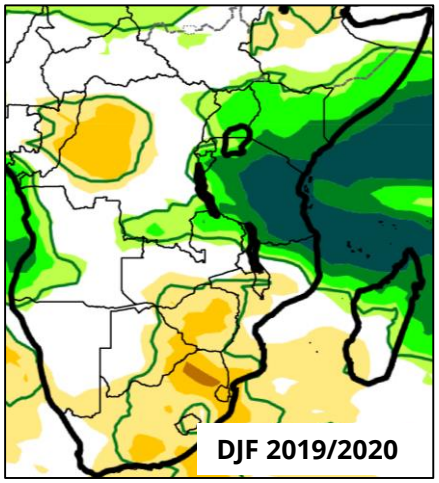
Normal	ALPS < 0.25
Stress	0.25 ≤ ALPS < 1
Alert	1 ≤ ALPS < 2
Crisis	ALPS ≥ 2

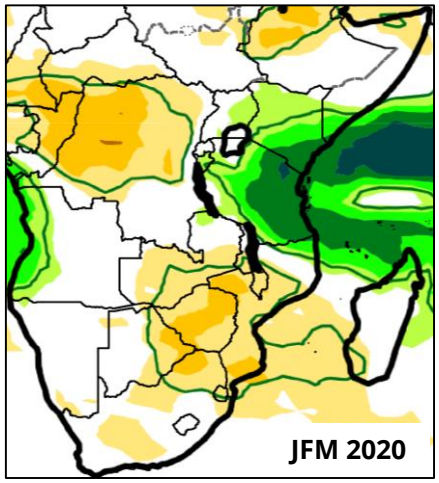
As a result of tight regional supply, maize grain prices across the region have generally been picking up earlier than usual this year. They have also been trending at significantly above-average levels, and are expected to remain above average throughout the marketing year..

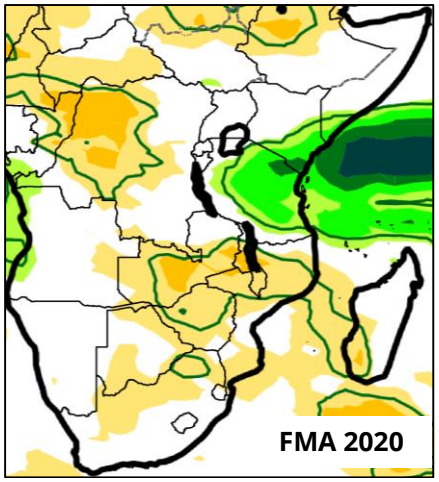
From mid 2019, an increasing number of markets began to indicate higher maize price levels. By October, in Zambia, of the monitored markets, 72% were in “Crisis,” 14% were in “Alert,” and 9% were in “Stress.” In Mozambique, of the 12 monitored markets, 7 were in “Stress,” 4 were in “Alert,” and Maputo was in “Crisis” (see map on the right).

There is no data available for Zimbabwe but we expect similar behavior: Zimbabwe is facing a complex and precarious macro-economic crisis, probably the worst since 2008. As of October 2019, its year-on-year food inflation rate stood at over 620 percent. Source: Trading Economics.

Seasonal Rainfall Forecast: Dec.2019 to Apr.2020







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0..10% | 10..20% | 20..30% | 30..40% | 40..60% | 60..70% | 70..80% | 80..90% | 90..100%

Latest seasonal forecasts from ECMWF, issued in November confirm with higher level of confidence that many areas across southern Africa are forecast to have below-average rainfall over the 2019/2020 agricultural season (November to April).

If these forecasts are realized, the region will face a second consecutive drier than average rainfall season. The previous season was already one of the driest since 2012. The key factor here is that recent forecasts from all main forecasting centres point in the same direction.

This represents a significant deterioration in the seasonal outlook compared to the SARCOF consensus forecast issued in August. Conditions have evolved since then, shifting the forecasts to the current less favourable outlook.

There is consensus among models that most parts of Zimbabwe, south and central Zambia, south and central Mozambique, Eswatini and southern Madagascar are forecast to receive below-average rainfall during the entire season. While South Africa, Botswana, and Lesotho are expected to have below-average rainfall during the first half of the season (November-January) resulting in delayed start of the cropping season.

In Tanzania, in contrast, the forecast points to a strongly wetter than average season that may lead to flash floods and landslides in coastal regions. Up to 200,000 people are living in flood-prone areas and may risk displacement over the next months.

Northern Madagascar, northern Mozambique and northern Malawi are likely to receive above-average rainfall with moderate risk of some localized flooding over the next 4-5 months.

FOR FURTHER INFORMATION:

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