

WFP Southern Africa Seasonal Update

October 2019 - February 2020

Regional Bureau for Southern Africa (RBJ)

Rainfall Performance

Like the previous season, the 2019/20 season has thus far been marked by an **unusual dichotomy of severe drought and flooding** in the southern Africa region (Figures 1 and 2).

October to December 2019 was one of the driest seasons since 1981 for southern Zambia, northern and western Zimbabwe, and southern Mozambique, as well as parts of South Africa, northern Botswana, and western Namibia (Figure 3).

This season's dryness is having a compounding effect on the previous season's drought conditions

in areas such as south-eastern Angola, north-eastern Namibia, northern Botswana, southern Mozambique, southern Zambia, and northern Zimbabwe.

In contrast, October to December 2019 was one of the wettest seasons since 1981 for northern Tanzania, northern Madagascar, parts of DRC, and western Angola (Figure 3). In parts of northern and eastern Republic of Congo (ROC), heavy flooding in late 2019 resulted in significant crop damage and a serious food crisis estimated to affect over 100,000 people.

Figure 1 Rainfall (percent of average) End January 2019

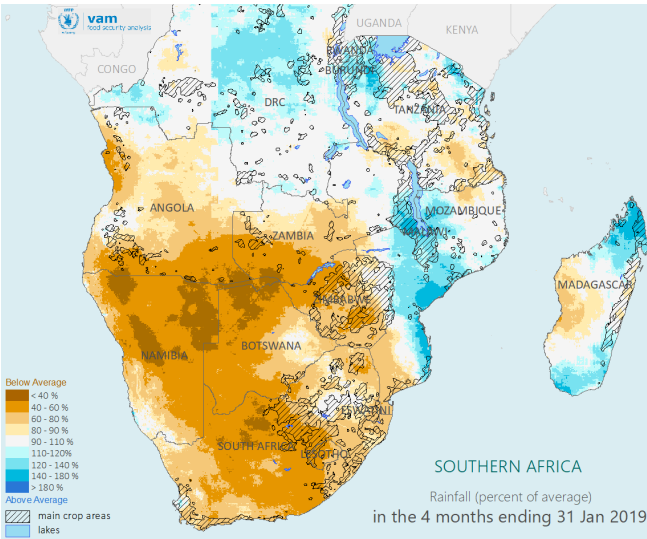
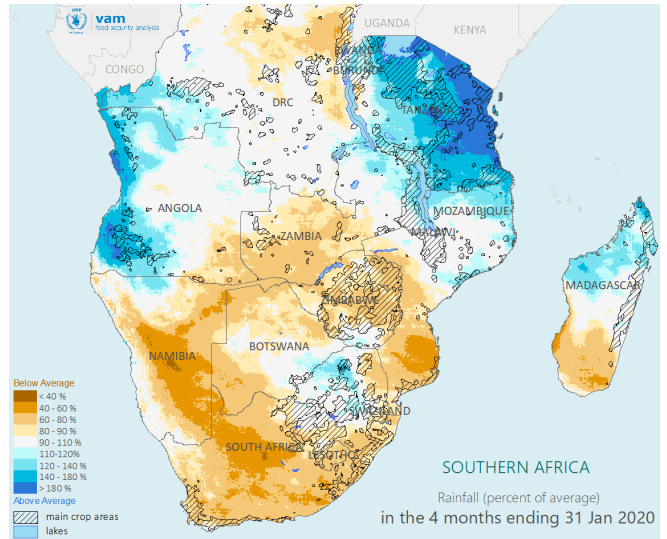


Figure 2 Rainfall (percent of average) End January 2020

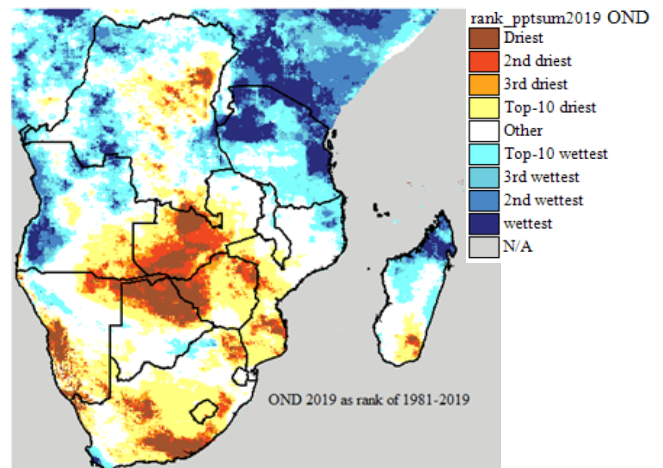


Data Source: CHIRPS

In northern and central Madagascar and Mozambique, as well as parts of Tanzania, DRC, and Angola, high rainfall continued in January 2020 and there have been reports of flooding. Although predominantly dry, parts of western Zimbabwe and southern Zambia have also experienced flash flooding.

In Mozambique, more than 58,000 people were affected by heavy rains and flooding in January, primarily in Zambezia, Cabo Delgado and Sofala provinces. In February, heavy rainfall increased the levels of the Búzi, Púnguè and Zambéze rivers, causing further flooding and damage in the central provinces of Sofala and Manica.

Figure 3 Rainfall for 1 October to 31 December 2019 expressed as rank for the 1981-2019 period



Source: CHIRPS - USGS/ FEWSNET

Rainfall Forecast

The current trend of dryness in central parts of the region and high rainfall in northern areas is forecast to continue through to the end of the 2019/20 rainfall season. However, the North American Multi-Model Ensemble (NMME) precipitation probabilistic forecast for February-March-April 2020 suggests some uncertainty over South Africa, Eswatini, Lesotho, and Zimbabwe (Figure 4). Even if rainfall were to pick up in the second half of the season, it would likely be too late to offset the cumulated deficits from the first half in places such as Zimbabwe, southern Mozambique, and parts of Zambia.

As we are in the middle of the cyclone season with high risk of floods and tropical storms, close monitoring of the situation will be needed until May 2020. According to the Mozambique National Meteorology Institute (INAM) at the beginning of the season, an average formation of 8 to 11 tropical storms is expected during the 2019/20 cyclone season, with 4 to 7 possibly reaching the cyclone stage.

Vegetation and Crop Conditions

Following rainfall in December and early January, vegetation conditions improved across several parts of the region. However, the effects of poor rainfall in the first half of the season can be seen in below average vegetation conditions in southern Madagascar, southern Mozambique, Zimbabwe, southern South Africa, and parts of Namibia (Figure 5). Some of these areas are suffering from the cumulative effects of years of drought.

In southern Mozambique and Zimbabwe, extended dryness in December and January has resulted in a generally unfavorable crop outlook (Figure 6).

Pest infestations also threaten the region's 2019/20 crop outlook. In Botswana, Eswatini, Madagascar, Malawi, and Mozambique, average crop fall armyworm infestation levels range from 25-50%,

Figure 5 Normalized Difference Vegetation Index (End Jan. '20)

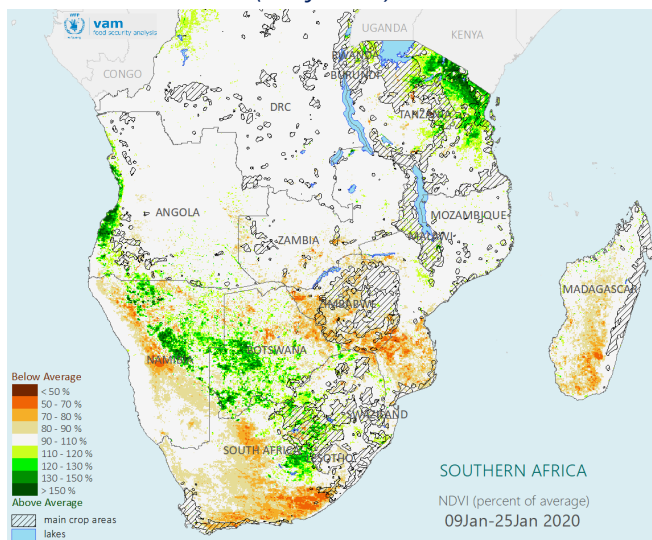
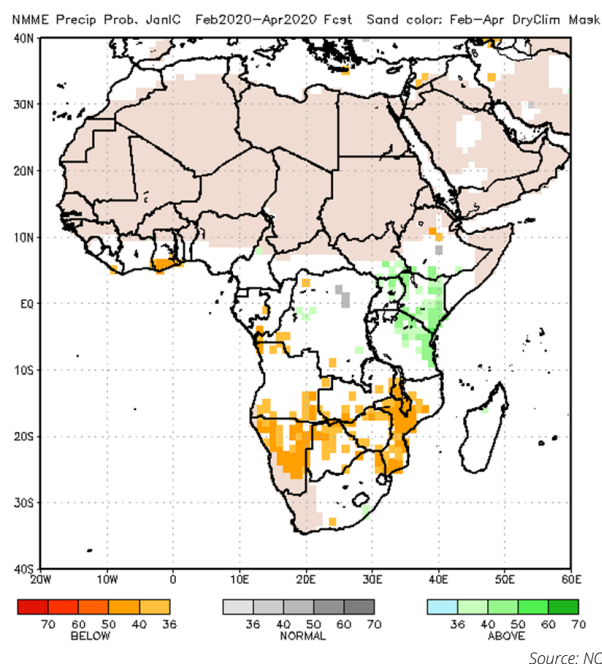


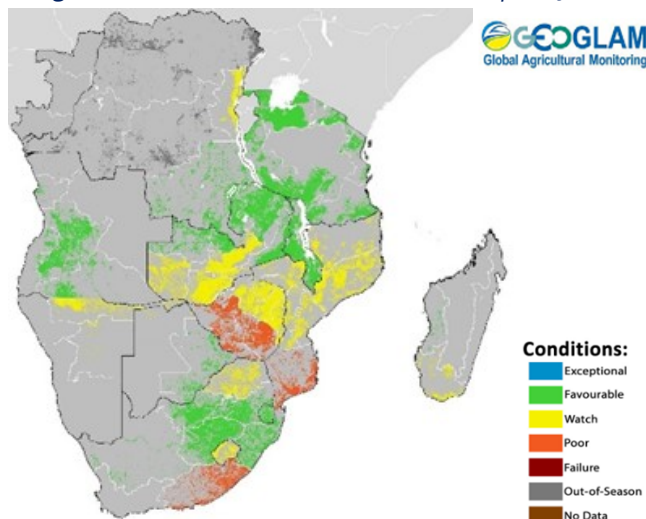
Figure 4 NMME Precipitation Probability February - April 2020 Forecast



which could result in expected yield losses of 10-20%. In southern Malawi, Namibia (Oshikoto region), Zambia (Eastern and Lusaka provinces), Zimbabwe (Mashonaland Central - Mbire), African armyworm infestations have also been validated. Close monitoring is needed to determine the impacts on this year's crops.

This season's rainfall performance has also led to poor grazing conditions, and in recent months high numbers of drought-related livestock deaths have been reported in countries such as Angola, Botswana, Namibia, and Zimbabwe. Dam levels are also reportedly low; the Kariba Dam, a significant source of hydropower for Zimbabwe and Zambia's electricity, was only 10% full at the end of January. In early February, dams that supply central Namibia were also reported to be only 18% full.

Figure 6 Post Harvest Maize Conditions Map (28 Jan. '20)



Note: Tanzania has been added to the GEOGLAM Southern Africa Region Map (both Maize Map 1 which covers main producing southern highlands and Maize Map 2 which covers short-season Vuli maize crops in the north).

Markets and Price Trends

In 2019, maize grain prices began picking up earlier than usual across the region. Current maize price movements show significant deterioration in food access compared to the year prior.

As the region's largest maize producer/supplier, South Africa's national average maize price remains stable at 5 year average levels (Figure 7). However, many other countries are seeing significant maize grain price spikes.

In Malawi, maize grain prices surged to historically high levels in January 2020; the national average maize grain price reached MWK 310/kg – the highest price in the past 5 years. Localized production deficits in the south have contributed to strong price increases. Malawi's food inflation rate increased from 14% in July 2019 to 19% in December 2019, reaching its highest level since January 2017.

Mozambique's national average maize price has also continued to increase; in December 2019, it was 85% higher than a year prior and 27% above the 5 year average (5YA) (Figure 7).

Latest data from Tanzania also shows that the national average maize price in December 2019 was 88% higher than a year prior and 31% above the 5YA (Figure 7). This is partly attributed to higher demand in neighboring Kenya, but also due to heavy rains which hindered transportation of maize grains across parts of the country.

In Zambia, another key maize producer/supplier in the region, the food inflation rate has steadily increased from 9% in July 2019 to 15% in January 2020 (Figure 8) - the highest rate since 2016.

Deteriorating macroeconomic conditions and depressed domestic production levels pose a significant challenge in Zimbabwe. The Zimbabwean RTGS Dollar shed off 7% of its value against the USD from December 2019 to February 2020 at the inter-bank rate. The loss of value was greater for the parallel rate at 27% and bond cash at 32%. Nominal consumer prices continue to rise as a result (Figure 9). As of mid-February, maize grain was reported available in only 6% of monitored markets, and its price has generally continued to be on an upward trend irrespective of payment modality*. (The weekly bulletin is based on data from interviews with 986 traders in 195 markets across 42 rural and urban districts).

*Payment modalities in Zimbabwe include bond notes, mobile money and swipe.

Figure 8 Zambia: Inflation and Food Inflation Rates (%)

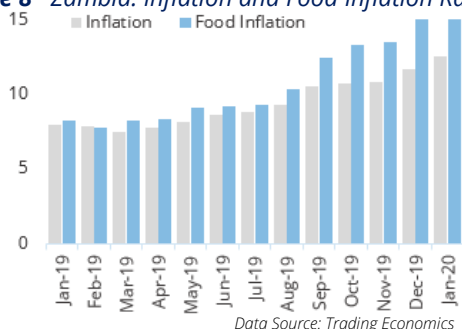


Figure 7 National Average Maize Price Trends

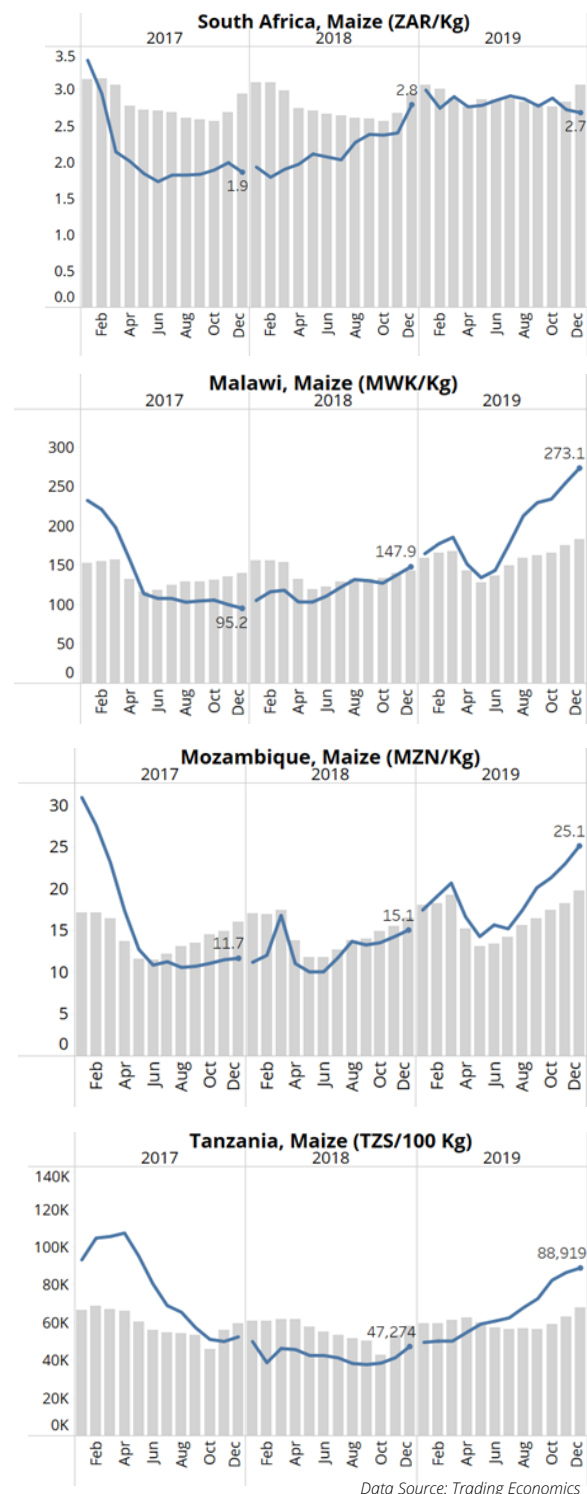


Figure 9 Zimbabwe: Exchange Rate Movements (ZWL/1US\$)

