

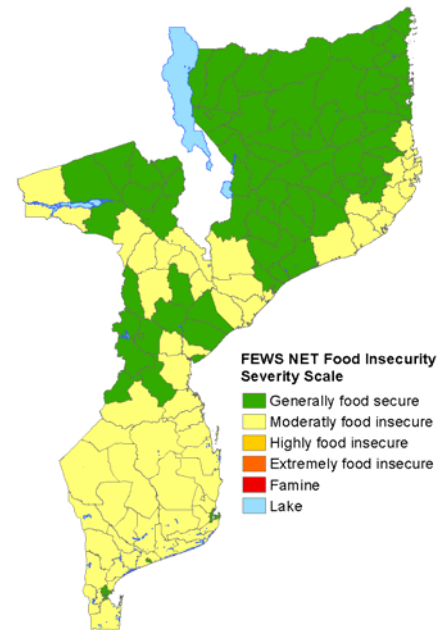
MOZAMBIQUE Food Security Outlook

April to September 2008

Summary

- Food security is a significant concern in flooded areas along river basins in central Mozambique and could spread as additional heavy rains are forecast and cyclones possible during the remainder of the season through the end of March. The Vulnerability Analysis Group (GAV) of the Technical Secretariat for Food Security and Nutrition (SETSAN) has estimated that around 258,000 persons affected by floods are in need of humanitarian assistance until March 2008 in the Zambeze, Save, Pungué and Buzi basins, and at least 226,500 of these people are expected to require assistance through May 2008. Further assessments in April will determine the level of needs after this point. Elsewhere in central Mozambique, food security conditions are favorable.
- Pockets of moderate food insecurity exist in parts of central and southern Mozambique affected by last year's drought, and 471,000 people in need will benefit from humanitarian assistance until the end of March, as the next cereal harvests begin. The majority of farmers in those areas planted crops before December, and many are now harvesting. However, crops in the south and central, particularly those planted after December, have been significantly affected by low rainfall and the temperatures since February, and many areas are facing reduced crop yields up to 50 percent due to the dryness. A current concern now is that if the dryness persists, the accumulation of soil moisture may be insufficient for the requirements of the second cropping season. In some areas where flooding occurred, this is not a concern, as sufficient soil moisture will remain after the recession of the flood waters.
- In the most likely scenario, from April to September 2008, the combination of the humanitarian aid in the flood affected areas, the relatively good harvest of the first agriculture season (and increased food availability and access) and the expected favorable agro-climatic conditions for the second season thanks to high levels of residual moisture are expected to significantly improve the food security situation in southern and central Mozambique. In the north, the majority of households will be generally food secure, except in the coastal areas of Nampula that was hard hit by Cyclone Jokwe, thus households may face temporary food deficits.
- In the worst case scenario, the post flood recovery process could be limited by an inadequate level of humanitarian assistance, which will result in deterioration of food security conditions in the resettlement centers and other flood affected areas, and by inadequate supply of inputs of inputs for the second season. In other areas, this scenario's assumptions include first cropping season production below the expected level and the persisting dry conditions that will decrease the soil moisture for subsequent planting and reduce water available for both human and animals.

Figure 1: Current estimated food security conditions, first quarter 2008 (Jan to Mar)

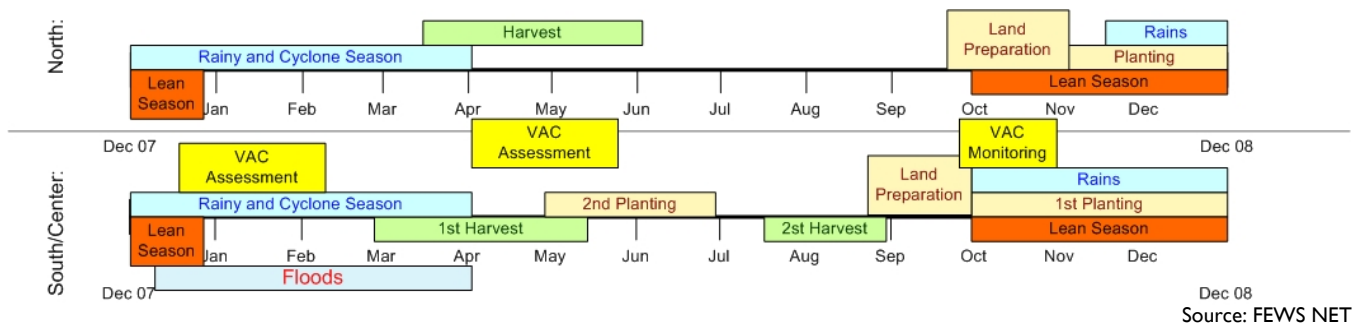


Source: FEWS NET

Background

FEWS NET developed this food security outlook to support contingency and response planning efforts between April and September 2008. The analysis provides current estimated food security conditions as well as estimated food security conditions from April – June 2008 and July – September 2008, according to the most-likely scenarios and worst-case scenarios. A food security assessment by SETSAN and its partners is planned for April, and the scenarios will be updated as the new information is available.

Seasonal calendar and critical events



Current food security conditions through March 2008

Currently, the food security of the majority of households outside flooded areas is relatively favorable or improving. Food is generally available from the new harvest, markets are adequately supplied, and prices are affordable enough to enable food access for poor households. Pockets of moderate food insecurity exist in parts of central and southern Mozambique affected by last year’s drought, and in parts of coastal northern Mozambique, but conditions have been improving since December with seasonal food availability, food aid interventions, and improved access to water for consumption by both households and animals. Food security is however a significant concern in flooded areas and could spread as additional heavy rains are forecast for the remainder of the season and the risk of water-borne diseases increases.

Thus far, the Vulnerability Analysis Group (GAV) of the Technical Secretariat for Food Security and Nutrition has estimated around 258,000 persons to be in need of humanitarian assistance until March 2008 in Zambeze, Save, Pungué and Buzi basins. At least 226,500 of these people are expected to require continued food assistance until May 2008, after which harvests and resettlement will enable them to recover. This figure could increase before then, depending on the intensity of rains and cyclones through the end of March, the normal conclusion of the rain and cyclone season. In response to the recent floods that are causing temporary food deficits among households along the swollen rivers of the central region, WFP and its cooperating partners are distributing food rations to vulnerable people in resettlement centers and making adjustments on the ground, depending on the needs of new arrivals. While food and non-food assistance from the government and its partners is being provided to the flood affected households in the central region, there is a growing concern about the expected food aid pipeline break in May 2008. The UN launched a regional international appeal in February as way to mobilize needed resources.

Currently, the World Food Programme (WFP) and its partners are also assisting 471,000 people with food assistance until March 2008, about 90 percent of those considered by the GAV last year to be in need. In the south, the majority of those in need were affected by drought last year, while in the central region, the majority had lost crops last season due to floods and cyclones.

The Ministry of Agriculture of the Government of Mozambique (GoM) estimates that water logging and nutrient leaching from the floods and heavy rains have, so far, damaged more than 150,000 hectares of crops in Tete, Sofala, Manica,

Zambézia and Inhambane provinces (approximately 15 percent of the total cropped area this season in those provinces), with complete losses possible in some of these areas. Households who lose crops would not be able to harvest new crops until August 2008, should conditions be favorable, and food assistance and input support may be necessary.

Most-likely food security scenario, April to September 2008

From April to September 2008, the combination of the humanitarian aid in the flood affected areas, the relatively good harvest of the first agriculture season, which has increased food availability and access, and the expected favorable agro-climatic conditions for the second season, thanks to high level of residual moisture, is expected to significantly improve the food security situation in the southern and central region of Mozambique. Good production from both the first and second seasons will increase food availability and household incomes from trade of agricultural commodities. Water availability is expected to be adequate for both human and animals. Food security will improve significantly in much of the drought affected areas.

Southern and Central Mozambique

April-June 2008

April will mark the effective end of the rainy and hot season and the beginning of the dry and cold season that will run from April to September. The major event taking place in April is the beginning of the harvest of the main agriculture season's production. Household level production is the main factor with a direct influence on the food security status of the majority of households. By this time, food prices reach their annual minimums due to an increase in food availability, households have access to income derived from crop sales, and food access improves significantly. Therefore, from April to June 2008, the food security of most households is expected to improve significantly in the whole country.

By April, the current floods affecting Zambezi, Búzi, Pungué, and Save basins in the central region will have effectively ended, and efforts from thousands of displaced households, most of them in the resettlement centers, with support from the GoM and the humanitarian community will be focusing on recovery actions, including support for the second cropping season by way of Input Trade Fairs, and direct distribution. The food security situation in the resettlement centers will depend on the prevailing humanitarian assistance and the ability of households to resettle and engage in second season cropping and other coping strategies, such as informal labor, fishing and sale of animals. Further assessments in April will determine the level of humanitarian assistance required beyond May 2008. It is anticipated that the current levels of humanitarian assistance will decrease in April, given that most households also had access to croplands on higher ground and market supplies are already improving with new harvests. Meanwhile, minimum conditions for temporary shelter, water, sanitation and health care would have been created.

Flood recession following the heavy rains, inundations, and floods during the first season will leave extensive areas with residual moisture, which, combined with the low temperatures, will lead to favorable food production conditions and post flood recovery. Nevertheless, the poor and most vulnerable households in the flood affected areas may not be able to

Table I: Scenario assumptions and indicators

Most-likely food security scenario

April to June 2008:

- Good first crop production in areas outside flooded areas
- Stable staple food prices
- Adequate humanitarian assistance for the flood affected people
- Timely supply of seeds and inputs for the second season

July to September 2008:

- Good 2008 second season production
- Stable staple food prices

Worst-case food security scenario

April to June 2008:

- Production of 2007/08 agriculture season below expectations
- Inadequate supply of seeds and inputs for the second season
- Inadequate humanitarian assistance
- Acute disease outbreaks in flood affected areas
- Above average staple food prices

July to September 2008:

- Poor 2008 second season production
- Above average staple food prices

sustain themselves without external assistance, as their resources will be divided in between reconstruction and food access.

Even the most chronically food insecure parts of southern and central regions of Mozambique, such as the remote interior and semi-arid zone of Gaza and Inhambane provinces and parts of the central region, will experience generally food secure conditions during the April to June period.

Away from flooded areas, the April to June period will be characterized by increasing food availability and decreasing food prices, hence improved food access to the majority of households. The favorable rainfall during the first season in the previously drought affected areas of southern and central region will contribute significantly to the improvement of the crop production in those areas. The April to June period is normally characterized by an overall improvement of the food security conditions and planting for the second season production. The timely supply of inputs in preparation for the second season is crucial, and input trade fairs have already been planned. For households able to purchase inputs, a sufficient supply early in the season will enable timely crop planting. For poorer households that are unable to afford inputs, input trade fairs will enable them to avoid using grain distributed as food assistance for seed. The sales of agriculture commodities are relatively intense during this period, when most of the markets are expected to be well supplied with food at fairly low prices.

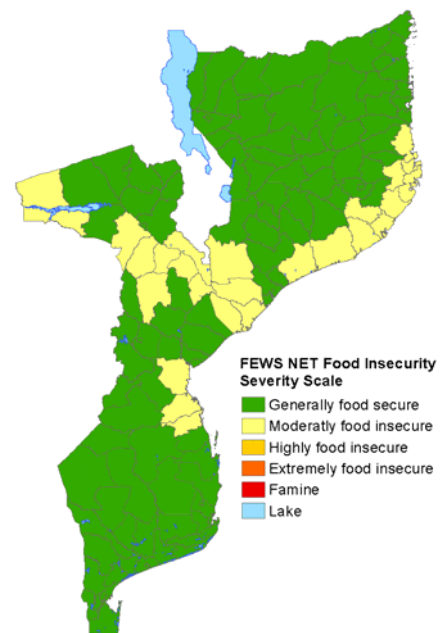
As normally occurs during the period following the harvest, informal trade will play an important role in the flow of agriculture cereals, especially maize, from the surplus areas to the deficit areas, and normal trade flows are expected. This flow will stabilize the prices, which are expected to follow normal seasonal patterns. As usual, southern markets will be mostly supplied by maize from Sofala and Manica provinces in the central region, while central markets will be supplied by locally produced maize.

July-September 2008

Following the harvest of the main agriculture season in April, most households, especially in south and center, with access to lands with favorable conditions for the second season will proceed with the initial sowing and plantings of maize, beans, and vegetables, which should be harvested in July and August. Sales of high value vegetable crops such as onions and tomato planted for second season will improve household incomes during this period. Household food security from July to September will also depend on the performance of the second cropping season.

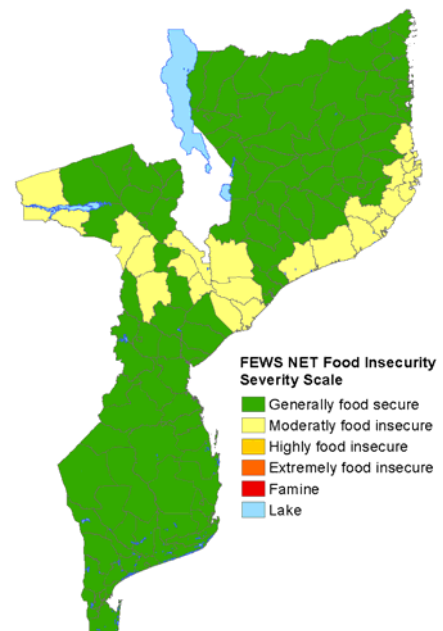
Thus, special attention should be paid to the flood affected areas along the Zambezi, Buzi, Pungué, and Save basins. The affected households themselves will play an important role during the recovering process, especially during the second season production. The performance of the second season will depend on seeds and adequate land availability. If those inputs are accessible and climate conditions are favorable, second season harvests will improve household food availability and income in after July. Trade flows will remain the same.

Figure 2: Most-likely scenario: estimated food security conditions, second quarter 2008 (Apr to Jun)



Source: FEWS NET

Figure 3: Most-likely scenario: estimated food security conditions, Third quarter 2008 (Jul to Sep)



Source: FEWS NET

Northern Mozambique

April-September 2008

This region normally remains relatively food secure, except in localized pockets along the coast, where moderate food insecurity is possible. April through September will be characterized by generally food secure conditions. Food availability and access will be adequate, and production surpluses will supply the markets and enable continued exports to neighboring countries. Prices will remain favorable for market purchases by most households. Even if localized pockets of food insecurity occur resulting from shocks during the past rainy season, most households throughout the region will be generally food secure. Low levels of food insecurity may occur in the coastal areas of Nampula and Cabo Delgado that face chronic problems of inadequate food utilization and cassava brown steak disease. Normal patterns of maize flow will occur whereby Nampula city will be supplied mostly by Zambézia Province, while Pemba and Lichinga will be supplied by locally produced maize.

Worst-case food security scenario, April to September 2008

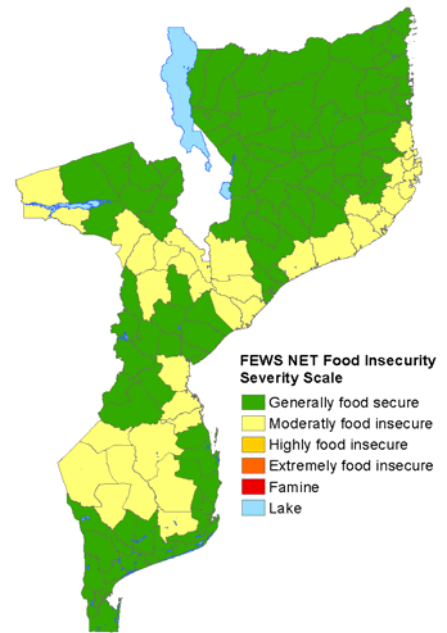
Southern and Central Mozambique

April June 2008

The post flood recovering process will be moderately affected by inadequate humanitarian assistance, due to poor and tardy donor response to appeals that will not meet the needs resulting in increased malnutrition rates in flood affected areas. In addition, a scarcity of resources could limit the ability to control disease outbreaks. In this scenario, food security conditions in the resettlement centers and other flood affected areas could deteriorate, leading to a much longer period of required assistance, beyond September 2008, and perhaps until the next major harvest in March 2009. While input trade fairs have been planned, any delay in their implementation would result in an inadequate supply of agricultural inputs, including seeds, affecting the second season production by delaying its start or limiting the extent of cultivated areas. In this scenario, the number of people in need of food assistance will not decline from current levels, and the timing for food assistance may cover the whole April to September period and beyond.

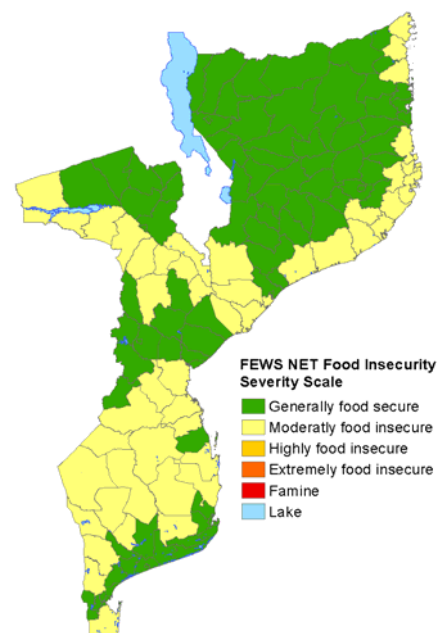
In areas not affected by flooding, because the end of season growing conditions were not as favorable as anticipated, production levels would be below average to average, and households, mostly the poor, may face reduced food availability and income earning potential. The start of the second season will be poor, especially in the previously drought-affected areas, because of the combination of unfavorable climate conditions and inadequate input supply. The food security for poor and middle income households in arid and semi-arid areas of central and south would therefore deteriorate in this scenario. These conditions will be exacerbated by above average food prices, and deteriorating terms of trade between household livestock and cereal, especially in remote areas where such transaction are made in kind.

Figure 4: Worst-case scenario: estimated food security conditions, second quarter 2008 (Apr to Jun)



Source: FEWS NET

Figure 5: Worst-case scenario: estimated food security conditions, third quarter 2008 (Jul to Sep)



Source: FEWS NET

July- September 2008

Given the poor supply of inputs and delayed start to the second season in the worst case scenario, the progress of the second season cropping will be very poor. The second-season production will be lower than in the most-likely scenario with almost no mitigating impact on the prevailing levels of food insecurity. Consequently, low food availability will increase levels of food insecurity in the southern and central regions. Households will have limitations in accessing food through market purchase as the staple food prices in the south will become high, up to almost double the average, and they will be forced to expand their coping strategies. Food and water intervention will be required to beginning in September and last until the next harvest. In addition water availability will begin to scarce, reducing the quality of water for consumption and limiting the water for animals.

Northern Mozambique*April-September 2008*

In the north, some deterioration in food security could occur in parts of the coastal districts of Cabo Delgado and Nampula provinces, where climate shocks are more severe in the worst case scenario and chronic problems of inadequate food utilization would persist. Poor households may face acute moderate levels of food insecurity.

Regardless, even in bad years, overall production at the regional level remains good. In this scenario, most households in the north will remain generally food secure. Even with a moderate decline in overall production due to weather shocks, such as the heavy rains in Nampula and Niassa, the majority of the households will still be able to access food, as it will be reasonably well available in markets, and prices should remain affordable.

Nevertheless in the north coastal, the storms in March April would impact food access through damage to standing crops and trees, as well as to infrastructure. With the potential damage to roads and bridges, food will become less available and prices would increase, thereby limiting household access to food, and the poorest household in particular may face acute food shortages. Potential interventions will be limited to the supply of inputs, shelter and possibly food.