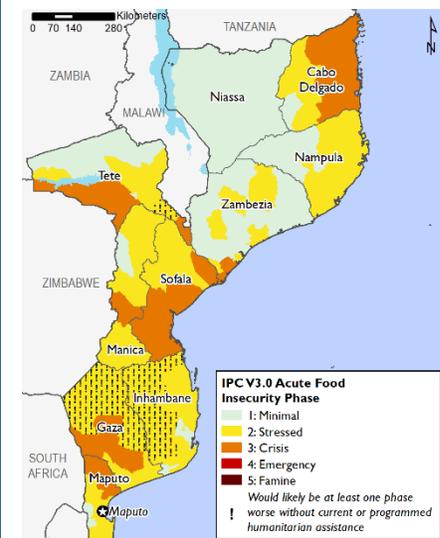


*Multiple shocks will drive above-average acute food insecurity after the main harvest*

**KEY MESSAGES**

- Most households across the country face None (IPC Phase 1) outcomes, relying on their own food production and market purchases, and are expected to remain food secure through September. From February through March, most of the south is Stressed! (IPC Phase 2!) while most of the central semiarid zone is in Crisis (IPC Phase 3) as the lean season ends. In these areas, the 2020/2021 harvest beginning in April, will improve food security outcomes to Stressed (IPC Phase 2) or Minimal (IPC Phase 1). Households impacted by tropical storm Chalane and cyclone Eloise face Stressed (IPC Phase 2) and Crisis (IPC Phase 3) outcomes, with affected households likely to recover through post-flood production if they have enough seeds to replant. In Cabo Delgado, the conflict is continuing to drive displacement and Crisis (IPC Phase 3) outcomes.
- Following a rapid increase in confirmed COVID-19 cases and deaths since January 1, 2021, the government has tightened containment measures, including implementing a 9 pm to 4 am curfew for the greater Maputo area. Although South Africa has reopened its main borders, strict COVID-19 control measures and tighter border controls for immigrants continue to impact informal cross-border trade and labor migration negatively. The current COVID-19 restrictions continue to drive Crisis (IPC Phase 3) outcomes among the poorest households in urban and peri-urban areas, as income from casual work and small business remains below average.
- Humanitarian food assistance is ongoing and likely to continue until at least through March 2021. Most assistance is likely to be directed towards the internally displaced people (IDPs) in Cabo Delgado, drought-affected households in southern and central regions, households affected by tropical storm Chalane and cyclone Eloise, recent floods, and households recovering from cyclone Idai. However, current and planned assistance for IDPs in Cabo Delgado is likely insufficient to improve outcomes in the affected areas and among beneficiaries due to the continuous flow of displaced households. However, humanitarian assistance is likely improving area-level outcomes to Stressed! (IPC Phase 2!) in drought-affected areas. Current food assistance is assessed to cover around half of FEWS NET's estimated food assistance needs from January to March 2021.
- An average harvest is expected from March to May 2021 as most productive areas benefit from favorable agro-climatic conditions, particularly in the central region. These areas include the highland areas of Sofala, Manica, Tete, Zambézia, and Niassa, the interior of Nampula, and the semiarid areas of southern and central Mozambique. In Sofala, Gaza, and Maputo's flood-prone areas, flooding is likely to drive below-average harvests. However, below-average rainfall is impacting yields in the coastal areas of Nampula and Cabo Delgado. However, if households have access to seeds, many flood risk areas are expected to recover with post-flood planting and second season production and harvest in June and July.
- In December and January, market prices have increased following seasonal trends, but prices have also decreased or remained stable in other markets. In areas where humanitarian food distribution is taking place, maize grain prices in reference markets such as Chókwe in Gaza province and Pemba market in Cabo Delgado decreased by 11 percent and 12 percent. In January, maize grain prices were 10 to 38 percent lower than respective prices last year and 8-43 percent above the five-year average across most markets. However, in the Chókwe market, maize grain prices in January were 21 percent below the five-year average. As typical, maize meal and rice prices were generally stable except for short-term variations based on localized supply and demand dynamics.

Current food security outcomes, February 2021



Source: FEWS NET

FEWS NET classification is IPC-compatible. IPC-compatible analysis follows key IPC protocols but does not necessarily reflect the consensus of national food security partners.

## NATIONAL OVERVIEW

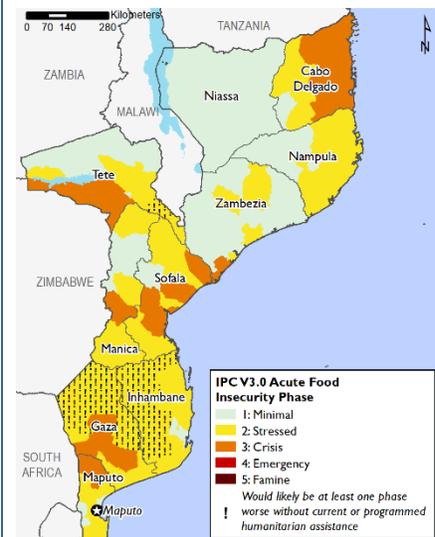
### Current Situation

The 2020/2021 rainy and agricultural season has been characterized by localized early to mid-season droughts in the far south and the northeast, and flooding from above-average rainfall, tropical storm Chalane, cyclone Eloise, and tropical depressions in the central and southern regions. Most households across the country are None (IPC Phase 1) relying on their own production food stocks from last season, the current green harvest, and market purchases. However, areas affected by shocks face Stressed (IPC Phase 2) or Crisis (IPC Phase 3) outcomes, with humanitarian food assistance driving Stressed! (IPC Phase 2!) outcomes in some areas. Much of the southern semiarid zones affected by last year's drought remain Stressed! (IPC Phase 2!), while most of the central semiarid zone continues to face Crisis (IPC Phase 3) outcomes. The volatility of the humanitarian situation in Cabo Delgado does not allow the use of the (!) symbol, which refers to areas where the IPC phase has changed due to the presence of humanitarian assistance.

In December 2020 and January 2021, much of Sofala province, and parts of Manica province, and other neighboring provinces, were affected by flooding from tropical storm Chalane and cyclone Eloise. Recovery efforts from March 2019's cyclone Idai were also impacted. Much of the affected area in Sofala province, and Sussundenga district in Manica province, are in Crisis (IPC Phase 3) due to crop losses and successive shocks on livelihood assets. According to information from the National Institute for Disaster Risk Management and Reduction (INGD), in Sofala province, cyclone Eloise affected more than 366,000 people, displaced more than 44,000 people, destroyed infrastructure, and flooded more than 143,000 hectares of agricultural land, about 5 percent of Sofala provinces' total planted area. The district of Búzi was the most affected, with 143,292 people affected, and approximately 25 percent of the planted agricultural area lost. The districts of Nhamatanda and Chemba both lost about 7 percent of their respective total planted areas. Other affected districts reported total cropland losses of less than 5 percent. In mid-February, tropical disturbances in the Mozambique channel associated with frontal systems in the south caused additional heavy rainfall in the provinces of Sofala, Inhambane, Gaza, and Maputo, and floods in several low-lying areas. The impact to planted areas from these floods is still to be determined. Recovery from previous shocks, particularly in Sofala and Manica provinces, are likely impacted. Due to the crop losses, many poor households will not harvest or have a limited harvest in April, impacting their access to food. Income from self-employment or casual labor activities to earn income for market food purchases will be affected by potential buyers' low income and above-average prices. Less affected poor households are expected to adopt coping strategies indicative of Stressed (IPC Phase 2) such as selling more animals than usual, forgoing non-essential or more expensive items, and consuming less preferred foods. More impacted households will engage in coping strategies indicative of Crisis (IPC Phase 3) such as skipping meals, reducing meal portion sizes, and consuming excessive wild foods if available.

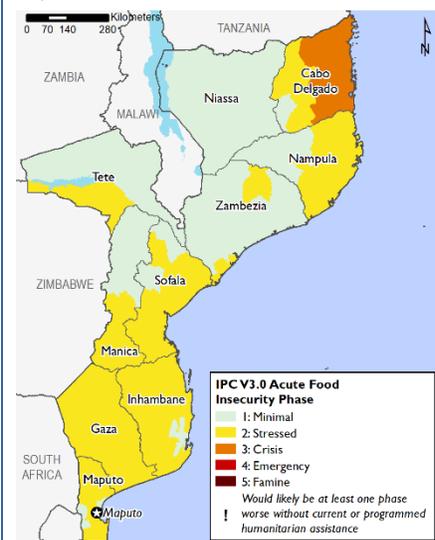
In February, heavy rains both upstream and locally resulted in flooding in low-lying areas along the main hydrographic basins in southern and central Mozambique. Additional heavy rainfall associated with tropical cyclone Guambe also affected Inhambane, Gaza, and Maputo provinces. The crop losses from flooding are driving Stressed (IPC Phase 2) outcomes in less affected areas. Crisis (IPC Phase 3) outcomes are present in low-lying areas of Chibuto and Guijá districts in Gaza province, where crop losses of 65 percent and 32 percent were recorded, respectively. Agricultural fields have also been flooded in other Gaza districts, including Chicualcuala, Mabalane, Xai-Xai, and Limpopo, where 10-21 percent of the planted area was lost. Through the 2020/2021 agricultural season, Maputo province has lost approximately 35 percent of planted crops due to a combination of floods, localized droughts, high temperatures, and pest damage. Across central and southern Mozambique,

Projected food security outcomes, February to May 2021



Source: FEWS NET

Projected food security outcomes, June to September 2021



Source: FEWS NET

FEWS NET classification is IPC-compatible. IPC-compatible analysis follows key IPC protocols but does not necessarily reflect the consensus of national food security partners.

households with adequate seed stocks are replanting to take advantage of post-flood residual moisture. According to INGD, since the start of the 2020/2021 rainy and cyclonic season, the various shocks have affected 674,724 people. Around 465,050 hectares of planted land have been flooded, with 75,959 hectares likely lost. Additionally, 2,092 small livestock have been lost, with 148 people injured, and 89 deaths, in addition to the destruction of infrastructure and equipment such as classrooms, health units, homes, fishing boats, power poles, bridges, and roads.

In Cabo Delgado, the displacement rate has fallen as most people in or near conflict areas are expected to have left for safer locations. According to estimates by OCHA, more than 660,000 people are displaced. Efforts are being made to ensure the supply of staple foods to areas where access is still possible by land, including areas surrounding conflict areas. With the start of the seasonal rains in December, poor households in conflict-affected and surrounding districts did not fully engage in agricultural activities as households were focused on traveling to safer areas rather than planting for the 2020/2021 agricultural season. Likewise, income and food from fishing has drastically reduced as many households have left the coast, lost their equipment, or fear going out to sea due to possible attacks. Most IDPs cannot fully engage in agricultural practices in the resettlement or temporary accommodation centers due to a lack of land and inputs. In the northeast of Cabo Delgado, Crisis (IPC Phase 3) outcomes persist as the situation remains volatile and households continue to flee to safer areas. The volatility in the conflict is affecting the distribution of humanitarian food assistance (HFA), as humanitarian organizations are unable to maintain reliable access to the conflict-affected areas. It is expected that households unable to travel to safer areas and without food assistance are likely facing greater food consumption gaps indicative of Emergency (IPC Phase 4).

An average to above-average harvest is expected from March, particularly throughout the central region, except in parts of Sofala province flooded from tropical storm Chalane and cyclone Eloise. Higher than normal production is expected across most of the semiarid zones of northern Gaza and Inhambane Province's interior in the southern region. Exceptions include the lower areas along the Limpopo, Incomáti, Maputo, and Umbelúzi river basins, where flooding was driven by heavy upstream and local rainfall. The floods have resulted in the loss of around 76,000 hectares of crops, though affected households can still recover through post-flood or second season planting if they have seeds. In northern Mozambique, the harvest is expected to be average across Niassa province and slightly below average in western Cabo Delgado—not directly affected by the conflict—and Nampula province's interior. However, rainfall in coastal Cabo Delgado, mostly affected by the conflict, and central and coastal Nampula, has been less than 55 percent of normal, according to CHIRPS data. As of mid-February, the [Water Requirements Satisfaction Index \(WRSI\)](#) for maize is 'good' to 'very good' across most of Mozambique and 'mediocre' to 'average' in the far south. According to field reports from Nampula, many households in coastal areas planted in February, likely too late to recover a typical harvest. The upcoming harvest is expected to be poor in these areas.

According to provincial health directorates, there has been an ongoing cholera outbreak in northern Mozambique since early 2020, beginning in Mocímboa da Praia and Ibo districts in Cabo Delgado. Currently, cases continue to be recorded in Pemba, Metuge, Montepuez, Chiúre, and Ancuabe. As of February 23, 2021, 2,551 cases have been recorded, with 14 deaths. Cholera and diarrhea outbreaks are also being reported in Nampula, where IDPs have been relocating. In Meconta district, particularly the Namialo and Corrane area, 346 cholera cases have been recorded in 2021.

Most poor households in rural areas throughout the country continue to earn an average income through typical means, including the sale of crops, livestock, and forest products, including charcoal and firewood. However, many poor households have well below average incomes in the southern and parts of central semiarid areas due to successive drought events over the past four years. In the southern region, poor households are expanding self-employed activities, including collecting and selling natural products such as grass and firewood, building poles and reeds, producing and selling traditional beverages, and producing and marketing charcoal. However, income from charcoal production and sale is below-average due to increased competition and the above-average rainfall. When necessary, households are selling available livestock and poultry at average market prices. The migration of younger household members to South Africa is constrained by the border restrictions due to COVID-19 and strengthened measures to control illegal immigrants, contributing to a significant reduction in remittances.

In response to the multiple shocks, the government through INGD, WFP, and other partners, are providing HFA. In December 2020, WFP provided HFA to 763,641 people, and in January 2021, planned to assist 1,358,629 people, approximately 55 percent of FEWS NET's estimated total needs. However, due to difficult weather conditions impacting accessibility to remote locations, 658,379 people received January's food distribution cycle by mid-February. Beneficiaries of WFP's HFA in conflict-affected areas are receiving rations equivalent to 81 percent of their daily kilocalorie (Kcal) requirements, while beneficiaries impacted by the drought and ongoing lean season are receiving rations equivalent to 75 percent of daily Kcal requirements. Despite the presence of HFA at resettlement areas and relocation sites in Cabo Delgado and Nampula, the increasing number of IDPs and the volatility of the conflict is continuing to drive area-level Crisis (IPC Phase 3) outcomes even with the presence of HFA. Humanitarian assistance continues in the southern and central semiarid areas affected by last year's drought. Needs are expected to remain high, but household food access will improve following the harvest in April.

In January and February, the number of confirmed COVID-19 cases and deaths was more than double compared to the total number of confirmed cases in 2020. By February 25, the national COVID-19 test positivity rate was around 13.91 percent. It is believed that the increase in COVID-19 cases was due to the return of migrants working in South Africa, the relaxation of control measures in December, and an increase in domestic travel over the festive season. The Ministry of Health also confirmed that the more contagious South African variant of SARS-CoV-2 has likely been present in Mozambique since November 2020 and contributed to the significant increase in cases. On February 4, new 30-day COVID-19 mitigation measures were announced. All prior measures were maintained, but additional measures include a 9 pm to 4 am curfew for greater Maputo (Maputo, Matola, Marracuene, and Boane). The new measures are likely to continue to reduce economic activity, particularly the restaurant and transport sectors, and may increase unemployment as small and medium-sized companies lose capital. Access to daily wages for many informal workers in urban and peri-urban areas will also be increasingly difficult and is expected to prolong the number of poor households facing Crisis (IPC Phase 3).

After a month of closed borders, South Africa reopened its borders on February 15, but COVID-19 restrictions on people and goods' movement remain in place. The South African authorities have also reinforced measures to control illegal migrants, increasing the number of deportations. These measures continue to negatively impact small businesses relying on informal cross-border trade and reduce labor migration opportunities for domestic and informal workers. The reduction in remittances from South Africa is also reducing household income for thousands of households in southern and central Mozambique. The reduction in informal cross-border trade also contributes to an increase in processed product prices from South Africa. Overall, the restrictions are increasing food costs and reducing household purchasing power, particularly for poor urban and peri-urban households.

Poor household market food access in Mozambique is below average due to the increase in staple product prices in most markets driven by COVID-19 control measures, reduced household income-earning opportunities, and the depreciation of the MZN against the USD and ZAR. Food access is lowest in areas affected by drought, conflict, and recent cyclones and floods due to a lack of production and loss of food reserves and crops. Poor households affected by this year's shocks have lost much or all their annual food production and rely on market purchases. In areas where the second season is practiced, post-flood production is likely assuming seeds are available, with harvests available from June. However, cereal production is likely to be limited compared to vegetable production. Vegetable production is expected to improve household food consumption and be sold for income.

Below-average production in 2019 and 2020 is driving above-average staple food prices, reducing household income from crop sales, and restricting household purchasing power. In December and January, market prices have increased following seasonal trends, but prices have also decreased or remained stable in other markets. Maize grain prices generally remained above the five-year average due to successive price increases from multiple shocks, including cyclones, floods, droughts, and conflict, which have affected production in some areas of the country. However, maize grain prices decreased in reference markets in areas where significant humanitarian food distribution occurs. In the Chókwe market in Gaza province and the Pemba market in Cabo Delgado province, maize grain prices in January 2021 decreased by 11 and 12 percent, respectively, compared to December 2020. In maize surplus areas, maize grain prices were stable, including in the Ribáue, Manica, Lichinga, and Angónia markets. Across other markets, maize grain prices increased by 7-20 percent. In January, maize grain prices in most markets were 10-38 percent lower than 2020 prices and 8-43 percent above the five-year average. However, in the Chókwe market, maize grain prices in January were 21 percent below the five-year average.

As typical, maize meal prices remained stable from December 2020 to January 2021 in almost all monitored markets with few exceptions, likely due to short-term disruptions to supply. Maize meal prices remained stable or below their respective 2020 prices. Compared to the five-year average, maize meal prices had mixed trends, with most market prices ranging from 10 percent below to 10 percent above the average. However, in the Pemba market, maize meal prices in January were 15 percent above the five-year average, likely driven by increased demand. From December 2020 to January 2021, as typical, rice prices remained stable in all monitored markets with few exceptions where rice prices decreased by 7-14 percent or a 22 percent increase in the Pemba market. In most markets, rice prices were between 18 and 25 percent above the five-year average. While prices for imported rice are expected to remain more stable than bulk grain prices, there are always short-term variations based on localized supply and demand dynamics.

### *Assumptions*

The February to September 2021 most likely scenario is based on the following national-level assumptions:

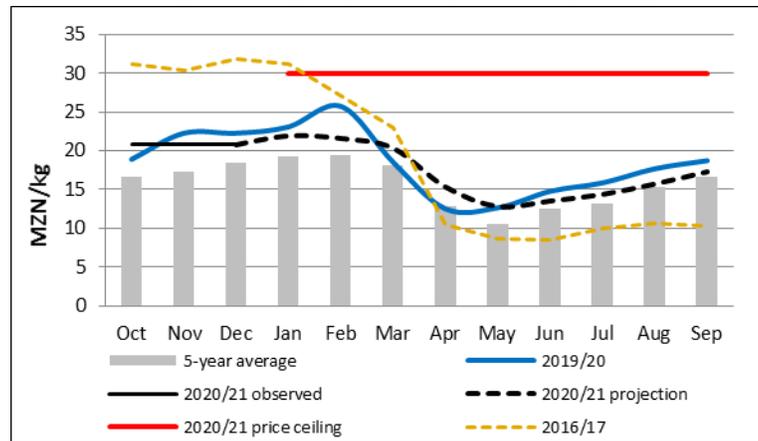
- Forecasts available through USGS and NOAA indicate that La Niña conditions are likely to continue through May 2021. The Indian Ocean Dipole (IOD) is neutral and expected to remain neutral through May 2021. Based on these climate

drivers, the cumulative rainfall for the remainder of the rainy season (February to March 2021) is expected to be average. A near-average number of cyclone strikes are expected through the remainder of the 2020/2021 rainfall season.

- The national water supply is expected to be average to above-average throughout the country following heavy rainfall in late January and February. The main dams will maintain normal levels in the center and north, including the Nampula dam where water levels increased by 138 percent from January 4 to February 24, 2021. In the south, the main dams have also rapidly filled to near-historic levels. The likelihood of additional flooding during the scenario period is low to moderate in northern and southern regions but moderate to high in central Mozambique.
- Favorable cropping conditions are expected in the primary production areas for the 2020/21 agricultural season. However, erratic rainfall during the early and mid-season periods is likely to cause crop production deficits in parts of southern and northeastern Mozambique. The delay and below-average rainfall in Nampula and Cabo Delgado's eastern areas are likely to result in below-average harvests. In areas affected by the conflict in Cabo Delgado, crop production will be well below average due to a lack of access to land and inputs for displaced households. In flood-affected areas across the country, though a post-flood recovery is possible, the respective harvest will be late. As typical, damage from pests and diseases, including fall armyworm (FAW), grasshoppers, and rodents, is likely. However, normal to above normal rainfall can help suppress the infestation levels.
- Driven by residual soil moisture, second-season production is expected to be normal to above-normal in the southern region, the central region, and the interior of the northern region. However, the coastal areas of Cabo Delgado, Nampula, and Zambézia provinces are expected to have below normal residual moisture. In flood-affected areas, households with retained seeds will replant following the recession of floodwaters.
- According to national estimates from the Ministry of Agriculture and Rural Development (MADER), in the 2019/2020 agricultural season, cereal, pulse, and tuber production increased by 7.8, 7, and 13 percent, respectively, compared to 2018/2019. For the marketing year starting in April 2021, near-average food availability is expected. It is anticipated that cereal imports, mainly maize, will be similar to last year; however, almost all national wheat and more than 50 percent of national rice needs will likely be imported.
- Trade flows of staple foods are expected to be below-average along some routes, including parts of Cabo Delgado due to the conflict and the coastal areas of Nampula and Zambézia due to expected low production in 2020/2021. In the southern and central regions, the agricultural product volumes traded are likely to be close to normal.
- Cross-border informal trade with South Africa and Malawi is expected to be below average due to COVID-19 containment measures that restrict border crossings and anticipated favorable production in Malawi. Trade with Zimbabwe is likely to remain at normal or slightly above normal levels due to the increase in Zimbabwean buyers crossing the border to buy mainly processed foods in Mozambique. The tightened restrictions on cross-border movement are expected to continue through the scenario period. Border restrictions are expected to negatively impact cross-border trade and reduce remittances to many poor households, particularly in the southern and central regions. The slowdown in informal food commodity trade across the border will lead to price increases for perishable and non-perishable goods imported from South Africa and further reduce household purchasing power in urban and peri-urban areas. These measures will also negatively impact revenues and the volume of remittances from South Africa. Deportations of illegal Mozambican migrants are expected to continue throughout the scenario period, reducing the potential income of affected migrants and their households.
- Based on the national reference market of Gorongosa, maize grain prices are expected to follow the typical yearly trend while remaining very close to the five-year average and with a mixed trend compared to the last year's prices. Prices will begin to decrease in April in anticipation of the 2020/21 harvest. Prices will continue to decrease until July, when poor households gradually exhaust their food stocks and rely on market purchases for food. As typical, maize meal and rice prices, two of the direct substitutes for maize grain, will remain more stable. Prices for imported and processed commodities such as rice and maize meal are expected to remain more stable than bulk grain prices; short-term variations will be based on localized supply and demand dynamics.
- The Mozambique Metical (MZN) is expected to continue depreciating against the USD and ZAR throughout the scenario period. According to some projections, by September 2021, it may depreciate to 78.45 MZN/USD, similar to 2016. The depreciation is expected to discourage international imports and contribute to price increases for imported products, including rice and wheat flour, in the medium and long term. However, forecast stability in these products' prices in the international market is likely to stabilize importation prices during the scenario period.

- Rangeland resources are expected to remain close to average, including coastal Nampula, Cabo Delgado, and Zambézia provinces following moderate to heavy rainfall in January and February. Livestock body conditions will gradually improve with the availability of pasture. However, from May, pasture and livestock body conditions will deteriorate as typical, but both pasture and livestock body conditions will be above average. Livestock prices will likely stay close to average throughout the scenario period.
- Wild food availability will remain near normal levels through September. The availability of green foods is expected to be timely and close to normal throughout the country.

**Figure 1. Gorongosa maize grain prices and projections (MZN/kg)**



Source: FEWS NET Estimates based on MADER/SIMA data

- Based on available information, the COVID-19 pandemic is expected to continue through the scenario period as vaccine access remains low. Incidents of community transmission are expected to continue through the scenario period, particularly in the urban and peri-urban areas. Though the impacts are anticipated to be minimal in rural areas, a likely increase in COVID-19 cases may affect the income earned from the sale of livestock and goods for middle and better-off households due to reduced purchasing power from the urban areas.
- In urban and peri-urban areas, poor household incomes from formal and informal businesses are expected to continue to be drastically reduced, and unemployment is expected to remain high due to COVID-19 control measure impacts on economic activity. With the continuation of the state of calamity, the government is expected to continue enforcing preventive measures such as wearing masks in public, socially distancing, and reducing the number of people allowed to work.
- In rural areas, agricultural labor opportunities are expected to be close to normal across the country. However, poor households are expected to earn their wages after the harvest through in-kind, cash, and other payment modalities in areas affected by shocks, particularly in the southern and central semiarid areas affected by last year's drought. Due to increasingly tight border control measures in South Africa, cross-border migration is likely to be below-average. However, migration to urban areas in Mozambique will remain high.
- As the main agricultural season continues, households will continue to engage in agricultural labor opportunities and self-employment activities for income for market purchases. From June/July 2021, after the main harvest, rural households will gradually rely more on their typical income-generating and self-employment activities. However, in areas affected by shocks, earned income is likely to be below average due to increased competition and low demand from urban centers.
- With the ongoing COVID-19 pandemic, international commodity demand has declined, putting downward pressure on energy and metal commodity prices. Forecasted prices for key sources of Mozambican export earnings are expected to remain below average at least during the first half of 2021 and are likely to take several years to recover to their respective 2018 or 2019 levels. These reduced export earnings coupled with reductions in other sources of key government revenues (e.g., tourism) are expected to depreciate the MZN against the USD during at least the first half of 2021.
- In northern and central Mozambique, the ongoing conflicts are likely to disrupt the agricultural activities in affected areas, including the surrounding areas. Insecurity is expected to persist in northern parts of Cabo Delgado, and an increased number of households are likely to be displaced during the projection period. In the short term, a few households are relying on support from relatives in more secure areas, but this is not expected to last at current levels throughout the projection period due to a lack of support capacity. Households that lose support are expected to rely on humanitarian food assistance.
- WFP will continue to provide humanitarian food assistance based on its likely and initial funded plan for October 2020 to March 2021. However, this plan is subject to changes according to the availability of additional resources and the redirection of priorities. Other humanitarian organizations are focused on food assistance, treatment of malnutrition, WASH activities, and educating communities on COVID-19 safety and treatment.

### Most Likely Food Security Outcomes

From February to September 2021, most households across the country will face None (IPC Phase 1) outcomes, as they access food from carryover stocks, market food purchases, the green harvest in February and March, and the main harvest in April and May. In February and March, households in the drought-affected southern semiarid zones are expected to remain Stressed! (IPC Phase 2!) due to the presence of HFA, while most of the center's semiarid zone will continue facing Crisis (IPC Phase 3) outcomes. From April through September, the expected above-average harvest will improve household food access and drive improvements to Stressed (IPC Phase 2) or Minimal (IPC Phase 1). Due to heavy rainfall, both upstream and locally, flooding in February caused crop loss along the main river basins in southern and central Mozambique, driving Stressed (IPC Phase 2) outcomes through May. Poor households are likely to employ coping strategies indicative of Stressed (IPC Phase 2), such as selling more animals than usual, forgoing non-essential or more expensive items, or consuming less preferred foods. Many households in these areas are likely to recover with post-flood planting and second season production, assuming they can access seeds. From June, these households are likely to rely on harvesting their own production and improving to None (IPC Phase 1). In urban and peri-urban areas, poor households are likely to continue facing Crisis (IPC Phase 3) outcomes as the ability to engage in casual trade and small commerce will be below average due to the strengthening of COVID-19 control measures.

In northeastern Cabo Delgado, Crisis (IPC Phase 3) outcomes will likely persist through the scenario period, despite HFA improving outcomes among beneficiaries. The expected continued displacement is likely to increase the number of people who have lost access to their typical livelihood activities and income-earning opportunities. Crisis (IPC Phase 3) outcomes will likely persist in the inaccessible conflict-affected areas, and conflict is expected to continue. In these areas, it is expected that some of the worst-affected households that have lost homes and assets, and face difficulties escaping to safe areas, are likely to continue to face larger food consumption gaps indicative of Emergency (IPC Phase 4) outcomes. However, it is expected that the population experiencing these severe outcomes will remain relatively low, and the area-level classification will remain Crisis (IPC Phase 3).

In large parts of Sofala province and parts of Manica and surrounding provinces, the impact of tropical storm Chalane and cyclone Eloise are expected to delay the recovery efforts from 2019's cyclone Idai. Some of this zone will face Stressed (IPC Phase 2) outcomes through May except for the most affected districts of Búzi, Muanza, Nhamatanda, and Beira that will be in Crisis (IPC Phase 3) due to the loss of assets and crops from flooding. Many households with seed stocks in these affected areas are likely to take advantage of the post-flood agroclimatic conditions and above-average residual moisture during the second season and harvest in June/July, improving food security outcomes to Stressed (IPC Phase 2). Competition for job opportunities is expected to increase, and poor and very poor households will have limited income for market purchases.

### EVENTS THAT MIGHT CHANGE THE OUTLOOK

**Table I.** Possible events over the next eight months that could change the most-likely scenario.

Area	Event	Impact on food security outcomes
National	Humanitarian food assistance far below needs	Acute malnutrition and increased acute food insecurity are expected to increase along with an increase in the number of people facing Emergency (IPC Phase 4) outcomes.
	Scale-up of humanitarian food assistance in Cabo Delgado	The scale-up of HFA would likely improve food access and lead to area-level Stressed! (IPC Phase 2!) outcomes in Cabo Delgado.
	Limited access to seeds	Poor households will plant less than the planned cropping area and miss the opportunity to increase their food reserves and income from crop sales.
	Traders do not respond to market demands as anticipated, and no additional stocks flow to the deficit areas.	Local markets would be undersupplied, increasing food prices. Food access for market-dependent poor households would be more difficult, particularly in areas affected by shocks such as drought. Reduced market access would increase food consumption gaps among poor households.
Coastal Areas	Cyclones and floods striking the coastal areas of Mozambique	The risk of cyclones and floods is through March 2021. The worst flood-affected households would likely face food gaps until they recover through post-shock production beyond the scenario period

## AREAS OF CONCERN

### Central Sugarcane and Fishing Livelihood Zone (Zone 12)

#### Current Situation

The 2020/21 agricultural and main rainy season started on time with good rainfall and initial prospects for above-average crop production. However, on December 30, tropical storm Chalane brought heavy rain, localized flooding, and strong winds to the areas around Beira city and Dondo city. On January 23, the zone was hit by tropical cyclone Eloise, which caused widespread destruction to infrastructure and resulted in crop loss. About 143,292 hectares of crops in Sofala were flooded, particularly in Búzi and Nhamatanda along the Búzi and Púnguè rivers. According to INGD Sofala, nearly 25 percent of the planted area in Búzi district was lost to flooding. Nhamatanda district was less affected, with 7 percent of the planted area lost. As Búzi is a surplus maize grain area, a loss of 25 percent on expected production will significantly reduce food availability within the livelihood zone. Many of these areas were also severely affected in 2019 by Cyclone Idai and were still recovering. Most pasture has recovered depending on the duration of flooding and soil type, while water availability is above average.

Seed distribution has been taking place as seeds become available from various sources. According to INGD Sofala, following tropical cyclone Eloise, about 3,500 households received E-voucher cards worth 3,300 MZN each in Búzi district to purchase seeds. In Nhamatanda district, 25 tons of maize grain seeds and 10 tons of bean seeds were distributed to around 2,500 households. Similarly, 20 tons of maize grain seeds and eight tons of bean seeds were distributed to about 2,000 households in Machanga district, and 18 tons of maize grain seeds and 7.2 tons of bean seeds were distributed to around 1,800 households in Muanza district. Households are beginning to plant short-cycle variety crops, including maize grain, beans, and various horticultural crops, following the floodwaters' recession.

Many poor households lost their food reserves for the remainder of the lean season in areas directly affected by cyclone Eloise and associated floods. Most household food reserves are likely below average to no reserves. However, in higher elevated areas, households are likely to have only lost a portion of their food stocks while others have not been affected.

Poor households are reliant on market purchases and humanitarian assistance for food. Most households are engaging in self-employment opportunities such as producing and selling charcoal, construction, fetching water, making and selling bricks, brewing, thatching, cutting and selling construction poles, and cutting and selling reed (used in rural housing), and handcrafting to earn income. However, self-employment opportunities are limited given the widespread disruption of livelihoods. Poor households with available livestock, such as chickens, goats, or pigs, occasionally sell them for income. However, due to middle and better-off households having limited purchasing power, there is reduced demand which is limiting poor household incomes. The gathering of wild foods is currently limited following the widespread flooding and wind damage from the cyclone. Availability of water for consumption is poor, and water purification is likely required.

Maize grain trade within the zone is currently below-average due to damage to access roads caused by the heavy rains and floods associated with cyclone Eloise. However, as road access is gradually restored, the level of supply is expected to improve. The demand on markets is below average as most households have below-average purchasing power and are accessing food from humanitarian food assistance. Other crops such as rice, maize meal, and other processed foods are available in local markets, as they are supplied from major cities in the country, including Maputo and Beira. Sweet potatoes and cassava are normally obtained from local farming but were lost to standing floodwaters. Groundnuts, vegetables, and other cash crops were also flooded but have been replanted and are emerging. Based on price data analysis from Buzi and Nhamatanda markets in January 2021, there are no major changes in staple food prices. Following seasonal trends, from December 2020 to January 2021, maize grain prices increased by 10 percent in the Buzi market and remained stable in the Nhamatanda market. Maize meal prices increased by 8 percent in the Buzi market and 14 percent in the Nhamatanda market.

**Figure 2.** Central Sugarcane and Fishing Livelihood Zone



Source: FEWS NET

Following crop losses due to strong winds and floods, agricultural labor opportunities, particularly weeding, are below average reducing poor household income-earning opportunities and household purchasing power. Middle and better-off households affected by the cyclone/floods also have less liquidity available to hire labor. The typically limited agricultural labor opportunities for post-flood/second season planting are expected to be above average as households take advantage of the above-average residual soil moisture to recover crop losses. However, middle and better-off households are likely to rely on in-kind payments during the June/July harvest. Households not engaged in agricultural labor are likely to earn income from collecting and selling bush products and migrating to major cities, such as Beira, in search of casual labor opportunities. Households are likely to adopt coping strategies such as reducing expenditures on non-food items, seeking wild foods at levels higher than normal, and support from neighbors. Even after households have employed all sustainable livelihood and coping strategies, food gaps are likely to be present, and households will start engaging in unsustainable and Crisis coping strategies that include skipping meals, reducing meal portions sizes, and consuming excessive wild foods. Consumption-based coping strategies are not as resilient as most households have lost most of their livelihood assets during the cyclone/flood events in December and January. The limited number of poor households that can sell chickens or produce charcoal must transport their goods to far-away markets to find potential buyers, driving higher transaction costs due to increased transportation fees. Ongoing humanitarian food assistance in Sofala Province, which covers most districts within this livelihood zone, is estimated to have reached around 179,000 people in January 2021, with approximately 156,000 beneficiaries planned for February. Households are receiving rations equivalent to 75 percent of daily kcal requirements.

### Assumptions

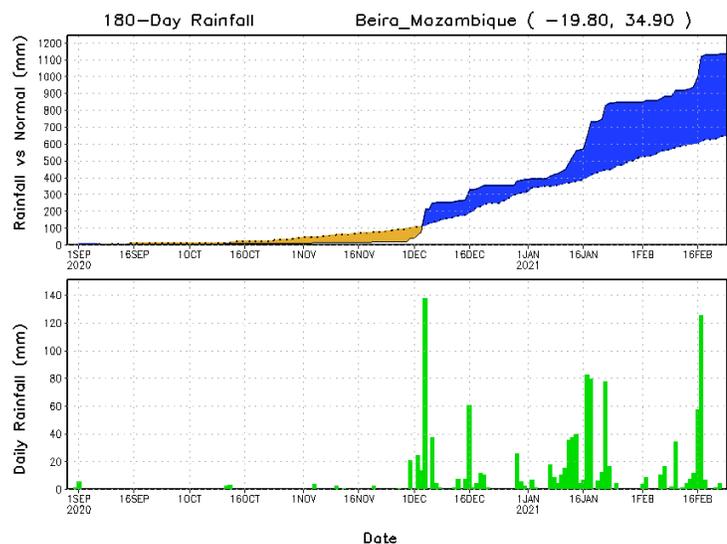
In addition to the national level assumptions, the following assumptions apply to this area of concern:

- Above-average residual moisture levels are expected for the second season cropping period (April to September) following above-average rainfall through the main season.
- Agricultural labor opportunities are expected to be above average for second season production from April to September. Better-off households are expected to pay labor through in-kind payments.
- Poor households will atypically intensify self-employment activities to above-average levels to earn income for food market purchases. However, due to competition and reduced purchasing power, the earned income will likely be below average.
- Based on analysis of current prices and drivers, staple food prices will likely remain atypically higher than last year following the start of the main season harvest in April as crop losses will drive a below-average harvest.
- Livestock prices are likely to remain near average, as households are most likely to sell them for food. However, demand may be below average due to low currency circulation and below-average purchasing power.
- During the entire scenario period, informal and formal trade flows are anticipated to make up zonal market supply shortfalls. However, overall maize grain availability will remain below average through the entire scenario period.

### Most Likely Food Security Outcomes

From February to May 2021, flood-affected households are likely to face food gaps. Households able to plant after the floodwaters' recession will likely harvest some production in June, including maize grain, beans, and various vegetables. Many households are expected to replant after the floodwaters' recession, but seed availability will determine the planted area. Most households typically lack available seed stocks to replant. Households are likely to sell available livestock and engage in

**Figure 3.** Cumulative and rainfall distribution in Beira district, Sofala Province



Source: NOAA/FEWS NET

self-employment activities such as charcoal and firewood production and sale to access income for market purchases. The consumption of wild foods is also likely to increase. However, household purchasing power is expected to be below average due to below-average income and high staple food prices. Above-average migration to major urban cities by household members for casual labor opportunities is likely to occur. Without humanitarian food assistance, the number of poor households facing food consumption gaps will remain high and drive area-level Crisis (IPC Phase 3) outcomes. In areas not directly affected by the flooding but sustaining wind damage, households will likely be facing Stressed (IPC Phase 2) outcomes. These households likely need short-term assistance to bridge food consumption gaps before the expected harvest in April. The harvest is likely to be close to average following favorable agroclimatic conditions. Income from crop sales is likely to be used to continue rebuilding homes or replacing lost assets.

From June to September 2021, the severely flood-affected households will continue facing food gaps and require HFA or engage in coping strategies indicative of Crisis (IPC Phase 3) acute food insecurity. Less affected poor households previously Stressed (IPC Phase 2) will begin to face food gaps as coping capacities become weaker and are likely to face Crisis (IPC Phase 3) outcomes as food stocks and purchasing power diminish. Most households are expected to engage in self-employment activities to earn income for food purchases. However, below-average income and above-average staple food prices will constrain household purchasing power. An increasing number of poor households are expected to start forgoing essential non-food needs in less affected areas and expand coping capacities to meet household minimum food needs, indicative of Stressed (IPC Phase 2) outcomes. Overall, an increasing number of poor households will face food consumption gaps, particularly in the most affected districts of Búzi and Nhamatanda. In August and September, the second season harvest will temporarily stabilize or improve food access for households engaged in the second season, resulting in Stressed (IPC Phase 2) or Minimal (IPC Phase 1) outcomes. Although residual moisture from the receded floodwaters and second season production will be above-average, harvests are expected to contribute less than 20 percent to annual household production. However, most households will rely on market purchases for food and continue intensifying typical income-generating and self-employment activities. However, earned income is likely to be below average due to increased competition. Migration to major urban cities in search of temporary casual labor is likely to occur. The most vulnerable, unable to engage in income-earning activities or second-season harvest, will increase their consumption of wild foods- normally eaten later in the year from December to March, including less preferred varieties, reducing food quantities, and skipping meals indicative of Crisis (IPC Phase 3) outcomes.

### Coastal Fishing Livelihood Zone (Zone 8)

#### Current Situation

Due to the conflict's sensitivity combined with the high risks in accessing conflict impacted areas, this assessment of food security outcomes is based on the convergence of available evidence. It is assumed that instances of conflict are not ubiquitous across the livelihood zone and are relatively sporadic. Therefore, if households are not directly affected by the conflict, they can cautiously engage in some livelihood activities.

The 2020/2021 rainy season started approximately 20 to 30 days late, with effective rainfall beginning in late December. According to CHIRPS rainfall data, cumulative rainfall through February 20 remains less than 55 to 70 percent of normal. In combination with the conflict, most households did not plant or planted well below-average levels. The upcoming harvest in April is expected to be significantly below average.

Despite a decline in insurgent attacks due to the rainy season, the ongoing conflict has affected normal subsistence activities, limiting households' ability to engage in cultivation activities for their own production and earn income through agricultural labor. Following the increase in violence in mid-2020, the government estimates that there are likely more than 560,000 IDPs in Cabo Delgado. It is also assumed that most people in the districts most affected by the conflict have already fled to safer areas, leaving just a small percentage of the civilian population living in the conflict zones.

Due to the conflict's sensitivity and limited access to the conflict areas, data is limited. However, based on the reports of households arriving in safe areas, basic household livelihoods, particularly in the

**Figure 4.** Reference Map for the portion of Coastal Fishing Livelihood Zone



Source: FEWS NET

areas directly affected by the conflict, are severely impaired. Reports indicate that households are concerned about minimizing exposure and risk to conflict rather than food production or engaging in income-generating activities. Due to the uncertainty of where the next attack may occur, households in the conflict zones seek refuge in the forests and only travel to their villages for food reserves. Additionally, the closure of markets and reduced purchasing power of potential buyers have limited household incomes. According to a Household Economy Analysis (HEA) carried out by FEWS NET in January 2021, which uses information on crop production, prices, and other sources to understand households' access to food and income relative to typical requirements, nearly 34 percent of the rural population will face survival deficits (meaning they will likely be unable to meet all their food needs) and essential non-food needs through March 2021. On average, very poor households will face survival deficits equivalent to about 15 percent of their annual food and income needs and will not meet their livelihood protection needs, affecting their short to medium-term production capacity. As a result, households will likely face consumption gaps or engage in coping strategies that damage livelihoods.

The risk of increased disease outbreaks in Cabo Delgado is high due to poor hygiene practices and poor access to clean water and sanitation facilities, which are increasingly overstretched due to the influx of IDPs into relatively better-served areas. According to provincial health directorates, there has been an ongoing cholera outbreak since early 2020 beginning in Mocímboa da Praia and Ibo districts. Currently, cases continue to be recorded in the districts of Pemba, Metuge, Montepuez, Chiúre, and Ancuabe. As of February 23, 2021, 2,551 cases have been recorded, with 14 deaths. Cholera and diarrhea outbreaks are also being reported in Nampula, where IDPs have been relocating. In Meconta district, particularly the Namialo and Corrane area, 346 cholera cases have been recorded in 2021.

Most displaced households rely on humanitarian food assistance from the government and partners and assistance from people of goodwill or income from non-agricultural livelihood activities. However, income from casual labor and petty trade is minimal due to the ongoing COVID-19 restrictions and increased competition. Some displaced households in or near rural areas have been allocated small land plots for cultivation. However, limited access to inputs and below-average rainfall, especially eastern Nampula Province, where most IDPs are resettled, has negatively impacted agricultural production. Overall, most IDPs remain dependent on humanitarian food assistance to meet their minimum basic food needs and remain in Crisis (IPC Phase 3).

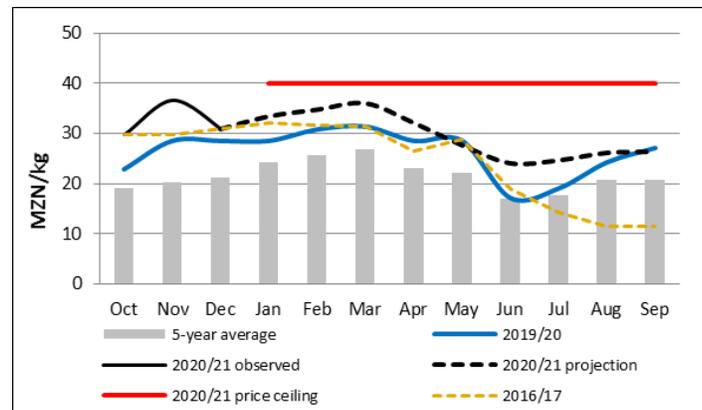
Based on FEWS NET's analysis of staple food prices in the Pemba market, which has trade connections with markets within the livelihood zone, the price of maize grain in January was 12 percent above the five-year average and the same as last year's price. The price of maize meal, which is one of the direct substitutes for maize grain, was 15 percent above the five-year average and the same as last year's price. Rice prices are 25 percent above the five-year average and 38 percent above last year's respective prices. The relatively high prices of staple foods and most processed basic products are reducing household purchasing power. Ongoing humanitarian food assistance in Cabo Delgado, which covers most districts within this livelihood zone (safe areas), is estimated to have reached around 287,000 people in January 2021. However, due to operational challenges, the January cycle of food distributions will continue into February. Based on estimates of more than 560,000 IDPs, not including those in conflict-affected areas, humanitarian partners and governments should prepare for continued high food assistance needs.

### *Assumptions*

In addition to the national level assumptions, the following assumptions apply to this area of concern:

- Attacks by insurgents in the region will likely persist, along with counter-military operations. The continuation of the conflict is expected to increase the number of IDPs.
- Labor opportunities and respective wages through cash or in-kind payments are expected to be well below average through the scenario period as the conflict limits access to normal livelihood activities. Additionally, most middle and better-off households are primarily concerned with fleeing violence and have below average or exhausted incomes. Consequently, changes in livelihoods will occur as households adapt to new situations.
- Due to low production levels during recent years, most households have no own saved inputs and require external assistance.
- Opportunities for self-employment will be well below average due to the conflict. The main concern of households will be to protect themselves against exposure to the conflict. In accommodation or reception areas (safe areas), self-employment opportunities will also remain scarce due to increased competition, COVID-19 control measures limiting income-earning opportunities, and lack of available inputs.

- Throughout the entire scenario period, most displaced very poor households will have no household food stocks except for those able to plant in new areas. Non-IDP household food stocks from the 2019/2020 agricultural season are already exhausted following the below-average crop production in recent years due to recurrent shocks, including cyclone Kenneth in 2019 and flooding in 2020.
- Due to the conflict's constraints and the precarious access routes, supply to local markets will be minimal or not occur. Most households will reduce their exposure to violent incidents by consuming rather than selling crops as they try to maximize their harvest.
- Based on integrated price projections, maize grain prices will continue to increase until March 2021. Maize grain prices will then gradually decrease with the start of the main maize grain harvest in April/May 2021. In June, maize grain prices will begin to increase through the scenario period gradually. During the entire projection period, maize grain prices on average will be 34 percent above the five-year average and 14 percent above last year's prices. Through the scenario period, maize grain prices will remain above the 2016/17 marketing year except in May, when maize grain prices will be similar.
- Through the scenario period, maize meal prices, the major substitute for maize grain, will remain relatively stable with occasional variations and remain on average 24 percent above the five-year average and close to last year's prices. Prices for imported rice and processed commodities are expected to remain more stable than maize grain prices, but short-term variations will be based on localized supply and demand dynamics.

**Figure 5.** Pemba maize grain prices and projections (MZN/kg)

Source: FEWS NET Estimates based on MADER/SIMA data

### Most Likely Food Security Outcomes

From February to May 2021, the conflict is expected to continue along with increases in IDPs. Households remaining in the conflict zones are likely to continue to travel to areas outside the conflict zone, increasing the number of IDPs residing at existing accommodation and resettlement centers. Incidents of conflict are expected to continue to disrupt food and income livelihood activities. Households in conflict areas are likely to continue relying on the forest for refuge and wild fruits and foods. The seasonal rains will continue to increase the availability of wild foods, contributing to stabilizing food gaps, but no significant food security improvements are expected. Displaced populations already in safe locations will continue to be limited in opportunities for income-generating activities due to the restrictions imposed by COVID-19 control measures. Most IDPs will continue to be dependent on humanitarian assistance. Households with access to HFA are likely to be Stressed! (IPC Phase 2!) but area-level Crisis (IPC Phase 3) outcomes are expected to prevail due to the rapidly evolving situation characterized by an increasing inflow of internally displaced people. Starting in April, a possible harvest will slightly improve food access through May, particularly in the relatively conflict-free areas. However, area-level improvements in food security from Crisis (IPC Phase 3) to Stressed (IPC Phase 2) will depend on the planted area and timely household access to land and seeds. In inaccessible conflict-affected areas, the worst affected households could face moderate food consumption gaps despite access to wild foods. Overall, most poor households in conflict areas will continue facing food consumption gaps driving a continuation of Crisis (IPC Phase 3) outcomes.

From June to September 2021, households typically consume food from their own production. However, most households will continue relying on humanitarian food assistance due to the anticipated ongoing conflict and below-average harvest. Households located in areas of insecurity where humanitarian assistance cannot be delivered are likely to engage in coping strategies indicative of Crisis (IPC Phase 3), such as relying on less preferred or less expensive foods, borrowing food, relying on help from friends or relatives, and limiting meal quantity and frequency. Households are expected to continue to use the forest for refuge and continue to eat wild foods and fruits. In conflict zones, households are expected to continue to travel to safer areas where income-earning opportunities and food access are better, while others will join family members in different parts of the country. Overall, most very poor households will continue facing food consumption gaps and are expected to remain in Crisis (IPC Phase 3). Displaced households will continue to be limited in their ability to engage in income-

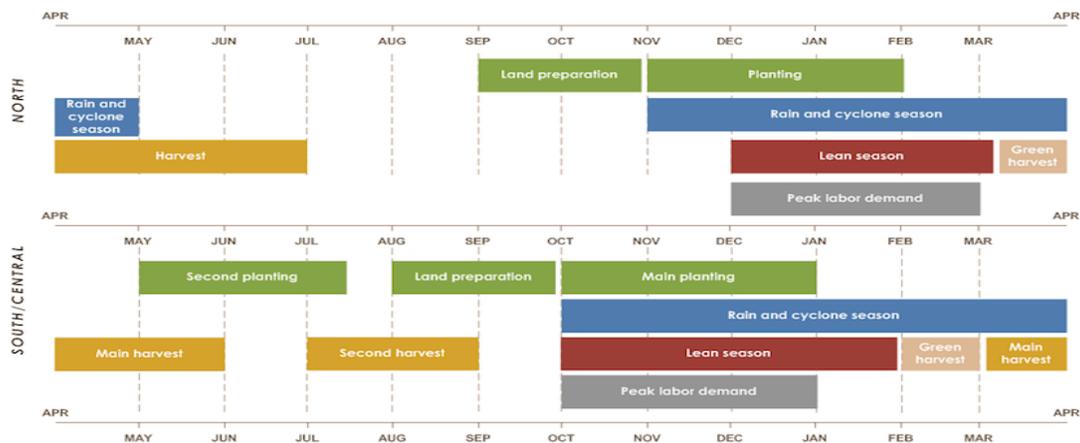
generating activities due to increased competition and reduced currency circulation. Most households will continue to be dependent on humanitarian assistance and are likely to be Stressed! (IPC Phase 2!).

**EVENTS THAT MIGHT CHANGE THE OUTLOOK**

**Table 2.** Possible events over the next eight months that could change the most-likely scenario.

Area	Event	Impact on food security outcomes
Livelihood Zone 8- North-central coastal fishing	Flooding or cyclone	A flooding or cyclone event from February to April 2021 may exacerbate the projected humanitarian situation and result in households facing Emergency (IPC Phase 4) outcomes due to the loss of shelter and food access.
	The expansion of territory by the insurgents or an intensification by the government to retake occupied areas	Any significant changes in the direction of the conflict, characterized by an expansion by the insurgents or an intensification by the government to retake the occupied areas, will increase food assistance needs as additional households are displaced. The possibility of displaced persons returning to their areas of origin is remote, at least through the scenario period.
	Humanitarian food assistance reaching the most needed areas	Currently, humanitarian assistance is not reaching difficult to access areas due to insecurity. More comprehensive access and assistance across Cabo Delgado could lead to an area-level classification of Stressed! (IPC Phase 2!).

**SEASONAL CALENDAR FOR A TYPICAL YEAR**

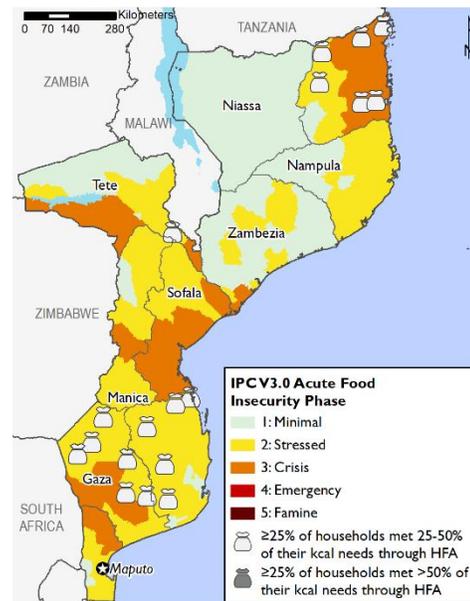


Source: FEWS NET

**MOST LIKELY FOOD SECURITY OUTCOMES AND AREAS RECEIVING SIGNIFICANT LEVELS OF HUMANITARIAN ASSISTANCE\***

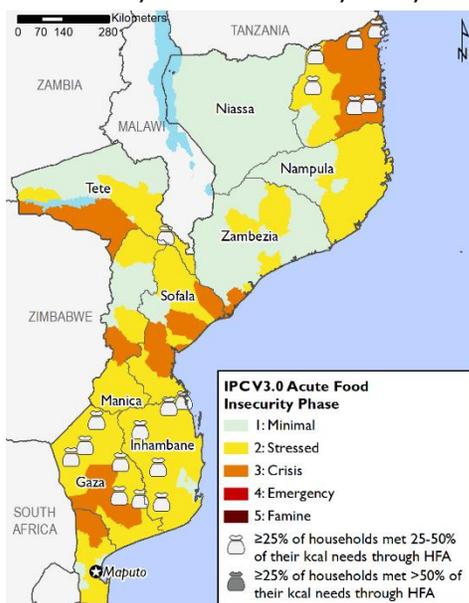
Each of these maps adheres to IPC v3.0 humanitarian assistance mapping protocols and flags where significant levels of humanitarian assistance are being/are expected to be provided. 🍲 indicates that at least 25 percent of households receive on average 25–50 percent of caloric needs from humanitarian food assistance (HFA). 🍲 indicates that at least 25 percent of households receive on average over 50 percent of caloric needs through HFA. This mapping protocol differs from the (!) protocol used in the maps at the top of the report. The use of (!) indicates areas that would likely be at least one phase worse in the absence of current or programmed humanitarian assistance.

Current, February 2021



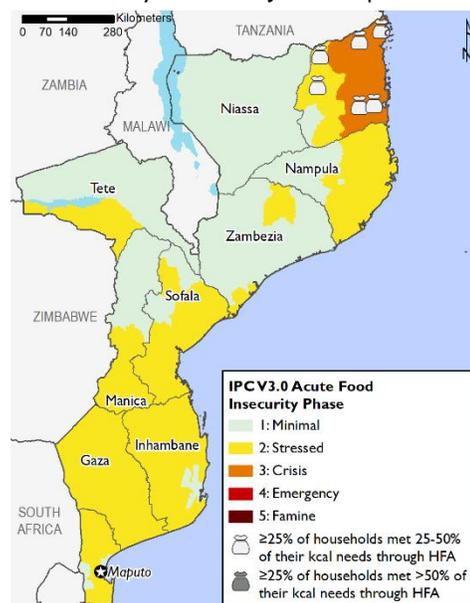
Source: FEWS NET

Projected food security outcomes, February to May 2021



Source: FEWS NET

Projected food security outcomes, June to September 2021



Source: FEWS NET

FEWS NET classification is IPC-compatible. IPC-compatible analysis follows key IPC protocols but does not necessarily reflect the consensus of national food security partners.

**ABOUT SCENARIO DEVELOPMENT**

To project food security outcomes, FEWS NET develops a set of assumptions about likely events, their effects, and the probable responses of various actors. FEWS NET analyzes these assumptions in the context of current conditions and local livelihoods to arrive at a most likely scenario for the coming eight months. [Learn more here.](#)