MADAGASCAR Food Security Outlook October 2020 to May 2021

An atypically severe upcoming lean season anticipated in southern Madagascar

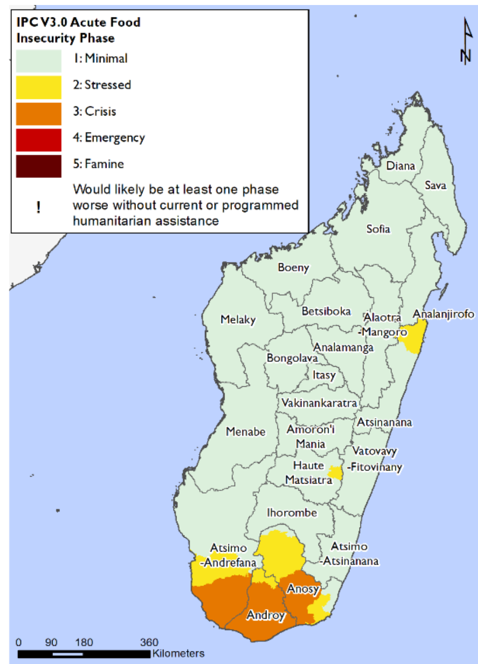
KEY MESSAGES

- Drought in southern areas, and subsequent crop losses and lower labor opportunities, is driving high needs. In October, available information points to area-level Crisis (IPC Phase 3) outcomes, with some worst-affected households in Emergency (IPC Phase 4), already occurring in the lead up to the typical lean season. Large-scale assistance is anticipated between November and January and, in the presence of this assistance, many beneficiaries will be able to minimally meet their food needs, driving Stressed! (IPC Phase 2!) outcomes at the area-level. However, it is likely some poor households will still be in Crisis (IPC Phase 3) or Emergency (IPC Phase 4), and area-level outcomes would be more severe in the absence of this assistance.

- National rice and cassava productions in 2019/20 were near the five-year average while that of maize decreased because of rainfall deficits that affected main producing areas of southern Madagascar in early 2020. Agricultural labor is currently near average at the national level because of near normal beginning of the 2020/21 rainy season, but below normal in the south where seeds are less accessible due to the below normal production in the previous season. Non-agricultural labor, particularly in urban areas and in touristic areas, is below normal as result of COVID-19 pandemic, which limited opportunities.

- Main food supplies were disturbed during the COVID-19 emergency state in Madagascar both for locally produced and imported staple food. Supply has returned to near-normal levels, but as traders remain mistrustful about the evolution of COVID-19 and anticipate higher prices in the peak of lean season in February, the volume of staples sold at markets remains below average and prices are above normal.

Current food security outcomes, October 2020



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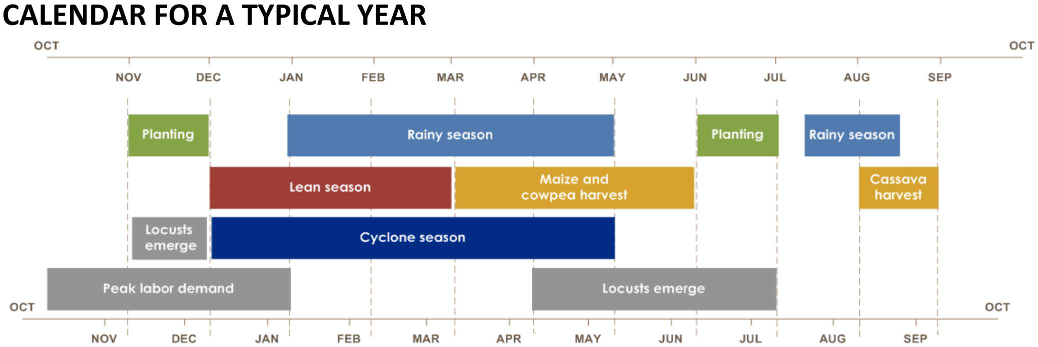
SEASONAL CALENDAR FOR A TYPICAL YEAR



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NATIONAL OVERVIEW

Current situation

Macroeconomy

During the second quarter of 2020, the *Institut National de la Statistique* (INSTAT) reported that export revenues had fallen by 30 percent compared to the second quarter of 2019, driven by a drastic fall of revenues from mining exports (-70 percent) and from textile exports (-20 percent), but also a sharp reduction in tourism (-100 percent). The COVID-19 pandemic and related restrictions is driving these trends, affecting the domestic and international economy since the first quarter of 2020. Moreover, some large international mining companies, like Ambatovy, have temporarily stopped their production.

Public health emergency

There were 16,968 confirmed cases of COVID-19 in Madagascar by the end of October, with 26 new cases confirmed, on average, per day since the end of September, an increase of five percent in one month. All regions are now affected with the majority of cases found in Analamanga (11,896), Antsinanana (907), Alaotra Mangoro (680) and Diana (537). Movement restrictions and curfews related to COVID-19 have been lifted across the country, allowing for free movement, the ability to work freely, and for markets to function during their normal hours. Limited international flights were allowed starting October 1st.

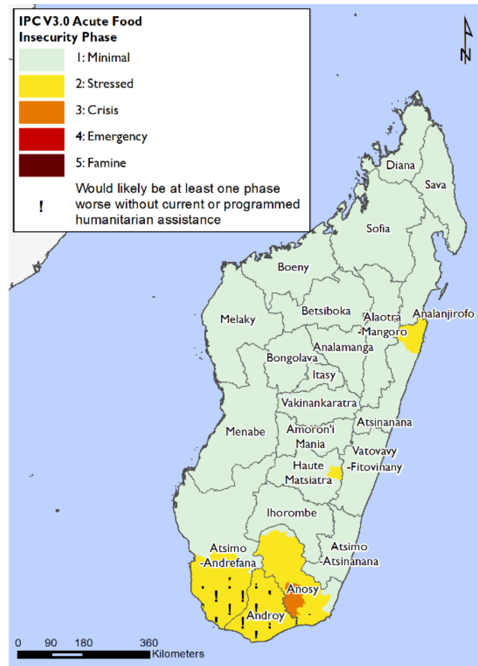
Rice production in main producing areas

Preliminary analysis of the NVAC/EPASA (Rapid Crop and Food Security Assessment) carried out in main producing districts for the 2019/20 cropping season shows severe drought impacts in southern producing areas like Betroka and Taolagnaro with more than 50 percent decrease in rice production compared to last year, a moderate impact of floods in Alaotra Mangora region leading to a 20-30 decrease compared to last year, and a slight decrease of production in Vatovavy-Fitovinany and Analamanga regions with five to 10 percent decrease compared to last year. Conversely, rice production increased in southern highlands near Fianarantsoa due to expanded cropped areas and favorable rainfall.

Rice imports

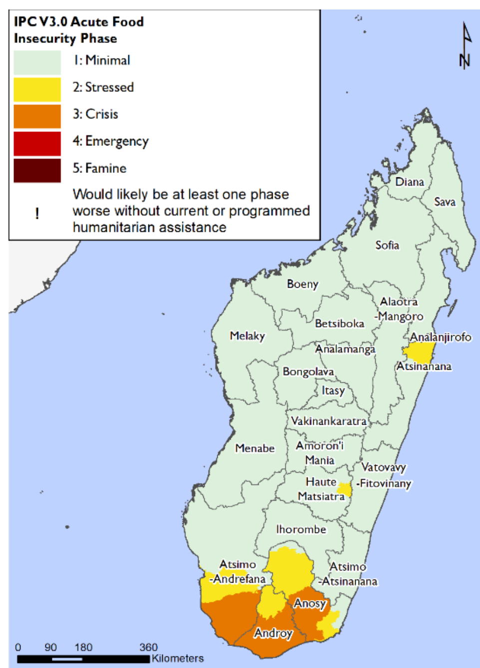
During the last five years, Madagascar imported on average around 400,000 metric tons (MT) of rice per marketing year (MY) to meet local demand and preference, and to fill localized gaps. Imported rice volumes are highest from November to April. India and Pakistan supply close to 80 percent of the imported rice in Madagascar. In the second half of MY 2019/20, January to June 2020, Madagascar imported about 200,000 MT, near the five-year average and the previous year. The most significant quantities were imported in January, February, and May 2020 (45,000 to 70,000 MT per month), to cover gaps from the extended lean season in southern Madagascar and the COVID-19 impacts in urban areas where the government sold imported rice at subsidized prices and distributed to very poor households.

Projected food security outcomes, October 2020 to January 2021



Source: *FEWS NET*

Projected food security outcomes, February to May 2021



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Food prices

In September 2020, prices of staple food in monitored markets were above five-year average and last year prices due to below-average stocks, except in Antananarivo. The atypical difference was notable for tuber prices in the south where stocks from usual sources have depleted and markets were supplied from farther districts like Ihosy, Andonaka, or Fianarantsoa. Compared to August 2020, prices remained stable in Antananarivo, Ambovombe, Tsihombe and Toamasina, decreased in Amboasary and increased in Ihosy, Fianarantsoa and Toliara I. Since August, local rice prices at the national level have continued to increase slowly.

Labor conditions and opportunities
With the massive decline in mining, textile, and tourism activities, many people lost their jobs and are currently unemployed. Large scale mining formally employs mainly middle households and the slowdown of their activities has impacts on the local economy. With the reduced purchasing power of these employees, local markets and local demand for informal labor from poor households (laundry, cleaning, etc.) has also reduced. Some employees have turned to agricultural activities in rural areas to access food and income. This phenomenon is concentrated in Moramanga and Toamasina where Ambatovy operates.

Livestock price
In the Tulear livestock market, cattle and goat prices are above the five-year average with increased demand from urban and surrounding rural areas where traditional ceremonies are taking place after the lifting of COVID-19 restrictions. However, goat and sheep prices are decreasing in districts impacted by the drought like Ampanihy, Bekily, Amboasary, and Ambovombe due to poor conditions and over-supply as dryness reduced pasture and water availability, particularly in rural areas.

Assumptions

The most likely scenario for October 2020 to May 2021 period is based on the following national level assumptions:

- **2020/2021 rainy season:** NOAA projects a weak to moderate La Niña as the most likely ENSO state between November and January. Typically, La Niña conditions drive above-average rainfall over southern Africa, though given the forecast for no significant SIOD event and considering that a weak La Niña has historically not been associated with a consistent deviation in seasonal rainfall over much of Madagascar, the most likely forecast is an on-time and average November to March main rainy season.
- **Cyclone season:** Between December 2020 and March 2021, an average number of cyclones strikes (estimated at 1-2) are anticipated to hit Madagascar, given that historical trends point to no evidence of increased or reduced cyclone activity.
- **Staple food prices:** According to FEWS NET's integrated price projections, locally grown cereal prices like local rice and maize will likely continue to increase between October and February and decrease from March through the end of the outlook period with the start of harvests. In Antananarivo, the effects of COVID-19 restrictions on local rice prices are decreasing, bringing these prices to near their last year and five-year average levels, a trend that is anticipated throughout the outlook period. In Fianarantsoa, however, prices will likely remain 50 percent above average throughout the outlook period because of the slightly below-normal supply following below-average local production. In the south, both dried cassava and maize prices will also likely remain elevated throughout the outlook period due to below-normal stock from lower local production. As for imported rice, like other imported commodities, prices will likely remain elevated at 20 to 30 percent above average throughout the outlook period particularly in Toamasina and Tulear, because of increased international prices and continued depreciation of the MGA.
- **Cropped areas/staple production estimates:** Most better-off households stored a large part of their main rice harvest to sell at higher prices during the lean season. Inter-season rice harvested in August/September from large irrigated areas of western Madagascar will also likely contribute to meeting needs. As for maize, many farmers will likely prefer planting other crops instead of maize because of the risk of FAW infestation. The green maize harvest, starting in January, will likely be below average despite the favorable near-normal rainfall. Finally, for tubers, cassava will likely be harvested and consumed little by little starting in February; on the other hand, early sweet potato harvests in fertile areas, including in the south, in March/April will likely be near normal.
- **Cash crop exports:** Following the global economic impacts of COVID-19, the demand for vanilla exports, a key cash crop and main foreign exchange earner for Madagascar, is below average. While production is above average, the quality is relatively poor, and buyers are expected to seek cheaper vanilla prices in other countries. Overall, small producer income and government revenue from this source will likely be below average.
- **Rice imports:** Demand for rice imports will likely be at the highest seasonal levels from October 2020 to April 2021 because of the lean season. However, internationally, following the evolution of FAO food price index, cereals will likely become

more expensive during this period. Therefore, between October 2020 and May 2021, rice imports will likely total around 150,000 MT, half of the five-year average and unlikely to cover demand resulting from below-average local production.

- **Macroeconomic context:** Government revenue and access to foreign exchange reserves will likely continue declining and reach below-normal levels. Meanwhile, the value of MGA will likely depreciate further until the second quarter of 2021, due to below-average mining and textile exports, reduced tourism, and increasing import needs. Currency depreciation will drive up prices of imported goods, namely rice.
- **COVID-19 pandemic and restrictions:** Based on past trends and in the absence of a vaccine, the total number of COVID-19 cases is likely to continue increasing throughout the projection period. No restrictions are expected to be re-implemented in Madagascar, though, except limitations on flights to and from abroad and the large gatherings. Passenger limitations on public transportation will likely continue, increasing transportation cost in the medium term and reducing poor households' movements and migrations.
- **Rural and urban labor demand and wages**: Lower labor demand is expected in urban areas because of the effects of COVID-19 on non-agricultural activities. Nevertheless, wages will likely remain near typical levels because they are already low and infrequently vary. However, agricultural labor demand linked will likely remain near average because of average forecasted growing conditions. Agricultural labor wages will likely be below average because of increased labor availability in rural areas as people remain hesitant to return to urban areas following the restrictions implemented in March.
- **Migration and remittances:** Labor migration will likely start again with restrictions on inter-regional travel lifted but will remain below average with higher transportations fees, remaining sanitary check points, and fear of moving to urban centers. Remittances, from family members back to poor, largely southern families, will also reduce.
- **Humanitarian assistance:** WFP emergency humanitarian assistance will be distributed in the eight districts of southern Madagascar between November 2020 and January 2021, consisting of an unconditional distribution of a 15-day ration to approximately 255,000 people and an unconditional transfer of 100,000 MGA to about 65,000 people. These distributions will likely be combined with nutritional supplementation program for all households with vulnerable people like Pregnant and Lactating Women and child under 2, among beneficiary households. In addition, Bekily district will benefit from full coverage of the nutritional supplementation program. CRS and ADRA's assistance will target 250,000 people in Beloha, Ampanihy, and Bekily districts. On the government side, humanitarian assistance under the African Risk Capacity (ARC) insurance program which will likely target around 90,000 people in the districts of Beloha, Ampanihy, and Ambovombe with unconditional and conditional cash transfers between October and December 2020.

Most likely Food Security Outcomes

Generally, at the national level, staple production and food supply is near normal and food prices remain near average, allowing most poor households to meet their basic food needs and support Minimal (IPC Phase 1) acute food insecurity from October 2020 through May 2021. Nevertheless, populations in some specific areas face food insecurity. Some districts in the south affected by the dryness which led to below normal production will likely be in Stressed (IPC Phase 2) during the outlook period, including two districts in MG23 and MG22 and some of urban areas where prices remain largely above normal after COVID-19, including Fianarantsoa I and Toamasina I. Poor households throughout the country working in the tourism sector have experienced significantly reduced income since the March 2020 international travel ban and are borrowing money and turning to local tourism, which earns them less income. This population is therefore expected to face Stressed (IPC Phase 2) acute food insecurity from October 2020 to May 2021. Additionally, small-scale vanilla farmers in North: Vanilla, Clove, Coconut Tree (MG02) are reportedly consuming wild food collected in the forest and selling non-productive assets to reimburse debts incurred at the beginning of the year due to relatively low vanilla prices. This population will likely face Stressed (IPC Phase 2) acute food insecurity throughout the outlook period.

In the MG 26: Anosy cassava, maize and livestock, food security situation has deteriorated very quickly after the end of the harvest due to dryness in early 2020 was severe and reduced staple production by half. Therefore, the area is facing Crisis (IPC Phase 3) acute food insecurity in October 2020 and between October and January 2021 as planned humanitarian assistance will likely not cover more than 25 percent of population. With the severity of lean season, the area will likely remain in Crisis (IPC Phase 3) acute food insecurity situation between February and May 2021.

In the Extreme south: cassava, maize, and livestock rearing livelihood zone (MG 24), FEWS NET HEA Outcome Analysis suggested that very poor households faced a survival deficit (consumption deficit) in October 2020. Household stocks have dried out since September 2020 so poor households complement their daily ration of dried cassava with more wild food. With an acute malnutrition prevalence based on MUAC between eight and 10 percent in September 2020, it is expected that the zone is experiencing Crisis (IPC Phase 3) acute food insecurity in October 2020. Between October 2020 and January 2021, very poor households in the zone will likely continue to face slightly reduced food gaps. The GAM prevalence based on MUAC is expected to slightly increase during the lean season to above 10 percent. With planned humanitarian food assistance distributions for the period November to January, the area will likely experience Stressed! (IPC Phase 2!) acute food insecurity between October 2020 and January 2021. In February and March, outcome analysis shows that very poor households in the area will likely face severe deficits again with the peak of the lean season, particularly with large-scale assistance distribution ceasing in January. In February, market purchases and wild food consumption will peak, and maize prices will likely increase in before declining at the end of March with the arrival of early harvests. GAM prevalence will likely increase in February/March and the area will likely experience Crisis (IPC Phase 3) acute food insecurity again between February and May 2021.

As for the Southwest: cassava and small ruminants (MG 23), very poor households, particularly those in Ampanihy, are reducing the frequency of their daily meals, most often to once a day. Less diversified diets composed of cheaper foods such as cassava leaves accompanied by dried cassava are observed, complemented with wild foods to meet energy needs. Two thirds of households in the five most drought-affected communes of the district have poor food consumption score (FCS) according to an EFSA in September 2020. In addition, poor households are accumulating debt, selling land, and engaging in illegal activities. The GAM based on MUAC was above 10 percent in October in Ampanihy with increasing admissions to MAM and SAM treatment centers, resulting in the district experiencing Crisis (IPC Phase 3) acute food insecurity in October 2020 with a significant portion of households facing Emergency (IPC Phase 4). Between October 2020 and January 2021, food consumption will likely improve given the food assistance distribution planned for November to January as well as more labor opportunities for very poor households. Acute malnutrition prevalence based on MUAC will likely remain below 15 percent and the district will likely experience area-level Stressed! (IPC Phase 2!) acute food insecurity between October 2020 and January 2021. In February and March 2021, food consumption of very poor households will likely further deteriorate, and wild food consumption will increase. Very poor households will likely start to sell their assets and animals. With an expected GAM prevalence near 15 percent, the district will likely face a Crisis (IPC Phase 3) acute food insecurity from February to May 2021.

EVENTS THAT MIGHT CHANGE THE OUTLOOK

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

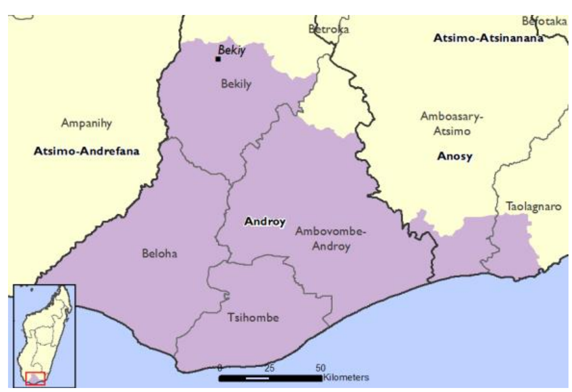
Areas	Events	Impact on food security
Urban areas	Re-implementation of COVID-19 restrictions (restricted inter-regional travel, curfew)	Decreased movement of people between regions as well as the limitation of labor migration and remittances will lead to a deterioration of food security in urban areas to Crisis (IPC Phase 3) outcomes during the learn season.

AREAS OF CONCERN

Androy Semi-Arid Cassava, Maize and Livestock (MG 24) – Ambovombe district

Ambovombe is one of the most southern districts of Madagascar. It is located in the epicenter of the drought-related food crisis between 2015 and 2017. It is no longer a surplus growing area due to water shortages, crop loss from insect attacks, and the lack of animal traction. This dryland region is known for its cattle, the zebu. The drought response effort is still important in the zone as it contributed to the local economy during the years of crop failure with inputs such as food aid, school feeding, livelihood support (seeds, small ruminants) and safety net cash transfers. 44 percent of population in the zone are very poor in the area according to the HEA Baseline report in 2017, totaling about 164,000 individuals.

Figure 1. Map of Livelihood Zone 24: Androy Semi-Arid Cassava, Maize and Livestock



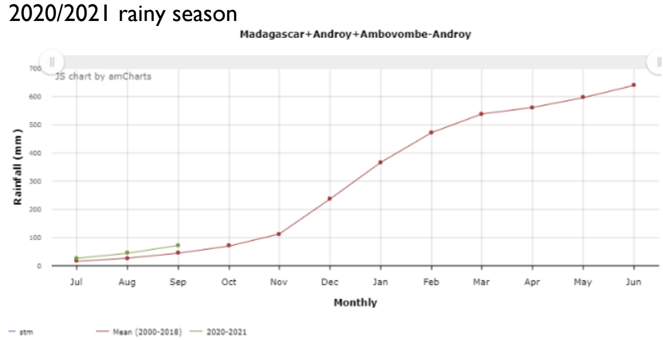
Source: *FEWS NET*

Current Situation

Rainy season

2020/2021 rainy season just started in Ambovombe district with nearly 90 mm rainfall registered in September 2020, which allowed farmers to plow their land and to plant cassava. This rainfall is slightly above average, according to EWX (Figure 2).

Figure 2. Cumulative rainfall in Ambovombe at the beginning of 2020/2021 rainy season



Source: *EWX/USGS*

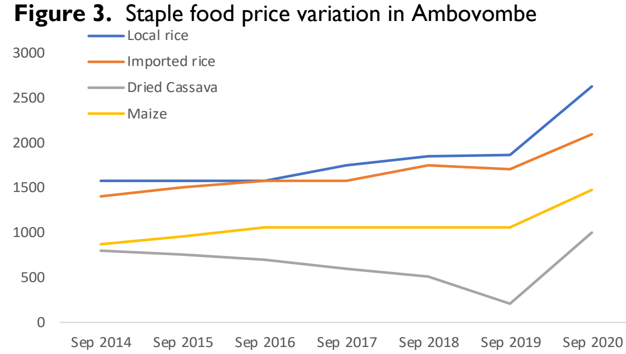
Cropping season progress

A few farmers continued to harvest tubers in August but most of them started planting cassava cuttings.

Recent harvest

Cassava production in Androy region is estimated to be similar to 2015-2016, around 80,000 MT, about 15 percent lower than five-year average because of moderate losses in northern Ambovombe but above-normal production in the southern part. Maize production dramatically reduced in recent years due to the effects of FAW, in addition to the rainfall deficit. Maize production in Androy region is estimated to be similar to 2018 production, around 600 MT, 50 percent below the five-year average.

Figure 3. Staple food price variation in Ambovombe



Source: *OdR/FEWSNET*

Staple foods prices

Globally, staple food prices in Ambovombe were largely above the five-year average in September 2020 because of the below-normal production in 2019/20, due to the rainfall deficit. Dried cassava stock from local previous production has depleted and that which is available at the markets is from farther districts like Betioky, with prices 50 percent above the five-year average. As for maize, it is mainly from Andranovory and sold in September 2020 at 50 percent above the five-year average. Imported rice prices are also significantly above the five-year average while that of local rice is 60 percent above the five-year average (Figure 3).

Food sources

Stocks from own production have depleted among very poor households. Very poor households began depending more on market purchases in September, typically the post-harvest period, as their stock from own production depleted earlier than normal. Most consumed staple food is from market purchases, particularly for tubers. Only a small portion of consumed foods are from own production. Local dried cassava stock has depleted and cassava available on markets is from farther districts like Betioky, and most maize is from Andranovory. Above-normal consumption of wild foods, like tamarind with ash and red cactus fruit, has been observed in Ambovombe since mid-September.

Income sources

Very poor households usually earn income through local casual labor and by selling poultry, firewood or wild foods. In September 2020, labor demand was below normal because of less total planted land due to lower availability of cassava cuttings. Labor wages also decreased more than usual as a result of lower demand. Poultry holdings have largely decreased since February 2020 because of more frequent sales and poor breeding conditions. Livestock herds are currently slightly below reference levels in Ambovombe, which limits opportunities for sales even if demand increased because roads re-opened following COVID-19 restrictions. Firewood selling dramatically increased with illegal logging in surrounding dry forests. Many very poor households sell firewood for income to buy food. The sale of wild foods, like red cactus fruit and sugar cane, is atypically high.

Water availability and pasture conditions

According to the 22nd bulletin on Drought produced by the WASH Cluster, the situation in Ambovombe was moderate in September 2020 based on NDVI. The vegetation has deteriorated compared to last year and is worse than the long-term median of the same month. Lower vegetation is limiting feed for cattle, and many are fed with cactus leaves. Regarding access to drinking water, in urban areas, a 20-litre water tin cost MGA 500 in September, similar to September 2019 prices. However, September 2020 prices were higher in rural areas; between MGA 1,500 and 2,000 compared to MGA 700 to 1,500 in September 2019. With the rain in early September, very poor households' access to water slightly improved compared to August.

COVID-19
As of mid-October, 16 COVID-19 cases have been reported in Androy Region. The emergency public health state is in effect nationally but movement restrictions, both for people and goods, as well as curfews, have been lifted across the country except to and from Diana region in the north, where the number of new cases is growing at a higher rate. Therefore, migration to find labor outside the area of concern is more available than it was in mid-2020, but still somewhat limited by case trends in more affected regions in addition to the higher cost of transportation due to social distancing measures, and the limited opportunities in cities given their gradual recovery from being locked down.

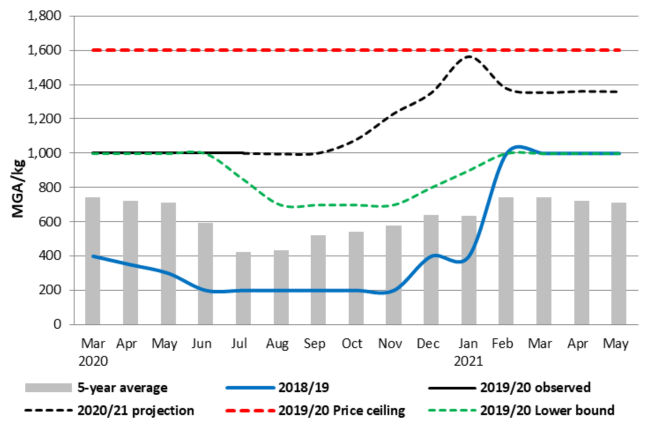
Assumptions

The most likely scenario for the October 2020 to May 2021 period is based on the following zone level assumptions:

- **Rainy season progress:** The NMME forecasts show normal rainfall from October 2020 to May 2021 in southern Madagascar. National forecasts even estimate above-normal rainfall in October and November in the western half of Androy region and normal to above-normal rainfall in the eastern half, which will likely allow farmers to start sowing cereals on time.
- **Cropping season:** Cereal harvests will likely take place at the end of the outlook period. District-level maize production will likely improve but will remain below normal, around 300 MT, because of lower accessibility to seeds from previous poor harvests and slight effects of FAW.
- **Cereal prices**: According to FEWS NET's integrated price projections, staple food prices prices will likely start increasing in October with the beginning of that lean season and the end of harvests. Prices will likely continue increasing until January and are expected to remain well above the five-year average because of lower available stock. Then it will likely decrease from February to May because of the minimal harvest expected in March/April but will likely remain above the five-year average (Figure 4-5).
- **Tuber prices**: According to FEWS NET's integrated price projections, dried cassava prices in Ambovombe will likely remain stable at the historical maximum of MGA 1,000 within the outlook period, which is above the five-year average.
- **Labor opportunities and wage rates:** Labor opportunities will slightly increase between October and January with the new cropping season and expected normal rainfall. However, opportunities and wages will likely remain below normal as farmers may have difficulty accessing seeds after the bad previous year. Migration will likely resume with the lifted restrictions of the movement of people to other regions, particularly to the southwest and the west, but will likely remain below normal because of the fear of infection among rural households and reduced opportunities due to the impact of COVID-19 in main cities. Labor opportunities will likely remain stable between February and May 2021 with green harvests and wages will likely near average (between MGA 3,000 and 3,500).
- **Wild food availability and consumption**: Wild foods like tamarind and cactus will likely continue to be a large part of very poor household consumption between October and January, at above-normal levels due to the below-normal access to staple foods. Consumption of wild foods will remain high in February and March 2021, at which time, households will likely revert to yellow cactus fruit and watermelon to complement their food consumption.
- **Pastureland and water availability**: Pastures are expected to continue deteriorating through December because of the end of the dry season. Water availability will also likely worsen until the end of December. With the near-normal rainfall expected in December, water availability will likely improve when rain starts falling, and prices will likely decrease.
- **FAW infestation**: FAW will likely infest the new maize crops, as it became endemic in the area and access to adequate treatment remains low. The level of infestation will likely decline compared to last cropping season because of an expected near-normal rainfall this year whereas dryness last year promoted the development of the FAW.
- **COVID-19 restrictions:** At the national level, emergency public health state will likely be maintained until the end of the year 2020. Movement restrictions for people to and from the most affected cities will likely remain lifted to allow for temporary migration from the district for employment during the lean season. The flow of goods will likely resume to normal levels.

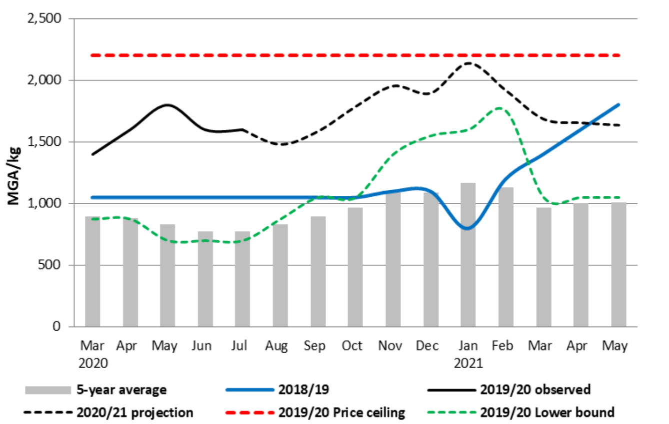
- **Humanitarian Assistance**: In response to the 2020/2021 lean season, WFP intends to distribute food to 312,000 persons and cash to 60,000 persons in 36 communes of southern Madagascar through their emergency programs from October to January. It will likely target more than 25 percent of the total population in Ambovombe and fill more than half of their food needs with a 15-day ration. The government will also target around 120,000 persons in eight districts in the south, around 15,000 persons in Ambovombe, using ARC insurance starting from October. WFP school feeding will also likely continue for next school year with the same coverage as in the reference year.

Figure 4. Integrated price projection of dried cassava in Ambovombe



Source: *FEWS NET*

Figure 5. Integrated price projection of yellow maize in Ambovombe



Source: *FEWS NET*

Most Likely Food Security Outcomes

According to FEWS NET Outcome Analysis, after experiencing below-normal production due to poor rainfall in early 2020, very poor households in Ambovombe district are experiencing deficits in October 2020. Between April and August, very poor households have been consuming food from their own production, which was helping them to offset the deficits somewhat, though consumption of own crops ended in September and by October, very poor households are increasingly relying on wild food like red cactus fruit and tamarind. Very poor households are also increasingly engaging in negative coping to meet their basic food needs including selling assets and reducing non-food expenditures. Although not widespread, there have been some reports of more severe strategies including selling land and begging. Meanwhile, the massive screening of acute malnutrition done using MUAC showed a proxy-GAM of 9.5 percent in Ambovombe in September 2020. MAM treatment admissions in the district has increased between March and April 2020 but stabilized between April and July according to WFP. SAM treatment admissions have been above the five-year average since February 2020. Overall, the area is likely experiencing Crisis (IPC Phase 3) outcomes in October 2020.

By November, large-scale humanitarian food assistance will likely be distributed to more than 25 percent of the population at a 50 percent ration. This will improve consumption among beneficiaries during this time period when consumption gaps would typically widen. Overall, most will likely be able to meet their basic food needs and experience Stressed! (IPC Phase 2!) outcomes. Assistance is not expected to meet all consumption needs and some very poor households will likely still face consumption gaps or engage in negative coping to meet their basic food needs. Based on historical trends, the GAM using MUAC prevalence will slightly increase during the lean season to above 10 percent. The admission rate for 41 percent in CRENAM and CRENAS, however, will likely stabilize and remain above average.

In February and March, outcome analysis shows that very poor households in Ambovombe district will likely face severe deficits with the peak of the lean, particularly following the termination of large-scale food assistance. Poor households will likely continue to complement their daily ration of dried cassava with wild food like yellow cactus fruit and watermelon. Households will likely extend selling their productive and non-productive assets and will continue selling animals. They will also increase agricultural labor (with the expected near normal next season), selling wild food like sugar cane and red cactus fruit, petty trading and migrating temporarily to cities (but with fewer opportunities). Overall, Crisis (IPC Phase 3) acute food insecurity is expected between February and May 2021.

Mahafaly Plain: Cassava, Goats and Cattle (MG 23) - Ampanihy district

The area of interest constitutes 80 percent of the territory of Ampanihy, excluding the northwest part crossed by MG22 and the coastal fokontany crossed by MG27. It is one of the driest areas in the country. Poverty was accentuated by different phases of drought before and after El-Nino (2015-2016) illustrates a very high level of vulnerability to economic shocks. Decapitalization has also been observed, with an estimated 45 percent of the population no longer own livestock according to the HEA baseline study in 2017. 45 percent of population in the zone are very poor in the area according to the HEA Baseline report in 2017, totaling about 184,000 individuals.

Figure 6. Location of the Mahafaly Plain: Cassava, Goats and Cattle livelihood zone

Source: *FEWS NET*

Current Situation

Rainy season

The 2020/21 rainy season has not started in earnest in Ampanihy. However, with below 50 mm rainfall registered in September 2020, the district has received a near normal amount of rainfall for this time of year, according to [EWX](EWX) (Figure 7).

Market supplies

The frequency of supply and the volume offered by traders is low compared to the same period last year. This is observed in all markets in the district except in the chef-lieu, Ampanihy city market, and in other large inter-communal markets along the national road, like Ejeda.

Food sources

According to data from the Emergency Food Security Assessment (EFSA) carried out in September by WFP and the Food Security Sub-Cluster in the south, in the five most drought-affected communes of Ampanihy district, about one in two households depended on their own production. Staple food stocks at the household level, however, are largely below last year when household stocks of dried cassava lasted more than six months. Currently, very poor households' stocks are near zero and they depend on either wild foods, which are less accessible in October, or on debt from wealthier households by borrowing food or cash to buy food. Picking cassava and sweet potato leaves from fields is also a significant source of food for poor households.

Income sources

According to the EFSA in September 2020, half of very poor households earned income from selling assets like agricultural materials, bicycles, portions of land, from selling charcoal/firewood, or from borrowing money. One in five very poor households depended on daily jobs and petty trade. Income remained low in October with fewer local opportunities than normally available; fewer animals to sell, fewer wild foods to sell, fewer daily jobs available, and fewer labor opportunities in mines, which are less profitable this year with fewer export opportunities.

Prices and purchase power

In September 2020, food prices remained above the five-year average, especially for cereals, dried cassava, and pulses (Figure 8). Wages were stable, and near average, between MGA 3,000 and 3,500, and equivalent to 2-2.5 kilos of maize, about 55 percent of the daily needs of a seven-person household. As poor and very poor households represent more than 75 percent of the population and job opportunities in the district and in other areas remained low, the purchasing power of those households is below the five-year average.

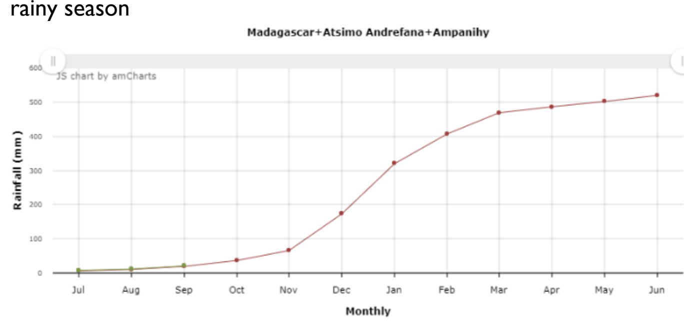
Water availability and pasture conditions

According to the 22nd bulletin on drought from the WASH Cluster, water availability in Ampanihy has deteriorated compared to September 2019 and most parts of the district were in moderate drought in September 2020.

Humanitarian assistance

CRS continues to intervene in the southern communes of Ampanihy district through their MAHARO project (2019-2024), in Ampanihy, and through their FIRANGA project (July 2020 to September 2021). They do General Food Distribution (GFD) as well as Food for Asset (FFA) programs. ADRA assists less than 10 percent of total households with FFA programs. MAM treatment is provided by WFP/ONN and SAM by UNICEF.

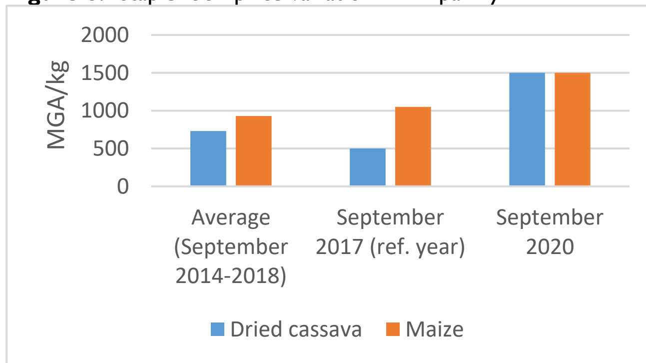
Figure 7. Cumulative rainfall in Ampanihy district in 2020/2021 rainy season



Source: *USGS/NOAA*

Wild foods
Excessive consumption of wild foods before June reduced their current availability. Only households on the coast have access to red cactus fruit. Wild tubers are also less available except in limited areas surrounding forests and the Tsimanampetsotse Reserve.

Figure 8. Staple food price variation in Ampanihy



Source: *OdR Data/FEWSNET*

COVID-19
Impacts of previous COVID-19 restrictions are still felt on markets and prices despite the reestablishment of inter-regional transportation and the movement of people in September. Impacts remain because transport costs are above average, due to social distancing limits on rider capacity, which has resulted in a reduced number of traders on markets and staple food prices being above the five-year average. In addition, local, regional, and national income-earning opportunities remain very low following the long period of lockdown.

Cumulative effects of drought and other shocks series
Resilience to drought of very poor households has decreased significantly since El-Nino (2015-2016) because of the succession of several shocks: rainfall deficit, windstorms, cattle robbery, COVID-19, FAW, locusts, animal diseases, and road degradations. The quantity and quality of household and community assets like agricultural equipment, livestock, forest resources, hydro-agricultural infrastructure, water access points, storage warehouses, etc. is low. In addition, according to recent assessments, many very poor households no longer have savings and/or are indebted. Subsequently, their share of food expenditure is very large and increasing.

Assumptions

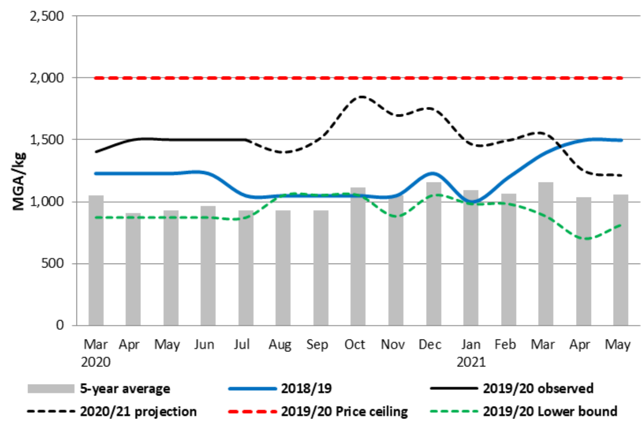
The most likely scenario for the October 2020 to May 2021 period is based on the following zone level assumptions.

- **Rainy season progress**: The NMME forecasts show normal rainfall from October 2020 to May 2021 in southern Madagascar. National forecasts even estimate above-normal rainfall in the southwestern region in October and November which will likely allow most farmers to start sowing cereals.
- **Cropping season:** Cereal harvests will likely take place from March to May 2021. Maize production will likely improve compared to last year but will remain below normal because of lower accessibility to seeds from previous poor harvests and because of the effects of FAW. FAW will likely infest the new maize crops as it is now endemic in the area and access to adequate means of treatment still lacks. The level of infestation will likely decrease compared to last cropping year season with more rain expected.
- **Market supply**: Between October and December, notably before rainy season road degradation, staple foods like local rice, imported rice, maize, pulses, and oil will be supplied weekly from Tulear by traditional wholesalers and transporters. From February to April, the rainy period, frequency of market supplies will seasonally reduce significantly, especially in remote and non-integrated markets. Other wholesalers with smaller capacities from other regions will also supply markets in Ampanihy with the re-establishment of inter-regional transport following COVID-19-related restrictions.
- **Cereal prices:** According to FEWS NET's integrated price projections, maize prices will likely be higher during the dry lean season (October to December) because of seed needs, the lower production and the severe lean season. Maize prices will likely slightly decrease in January with the green harvest in Ampanihy and surrounding districts. Maize prices, however, will likely remain higher than last year and then five-year average. Prices are expected to increase again in February/March at the peak of the lean season before decreasing in March/April (Figure 9).
- **Tuber prices:** According to FEWS NET's integrated price projections, from October, dried cassava prices in Ampanihy will likely increase until the end of the outlook period. Prices are estimated to be more than double the five-year average between October and January. It will likely be 160 percent above five-year average between February and May 2020 (Figure 10). This increase is driven by the impact of the drought of last year in the district and in the main traditional supply area like Tsiviory, Betroka and Tuléar II.

- **Wild foods**: Consumption of wild food will intensify during the projected period. Wild mangoes will likely be consumed earlier than normal between October and December. Tamarind consumption has already started and will likely increase until January. Wild tuber consumption will intensify earlier than normal from October to March. Consumption of red cactus fruit will progressively switch to yellow cactus fruit up to March. Watermelon will likely be highly consumed in January and February. The availability of those wild food will however be below normal because many were consumed earlier, during the extension of 2019/20 lean season. Wild food prices will also increase during the dry lean season before December.

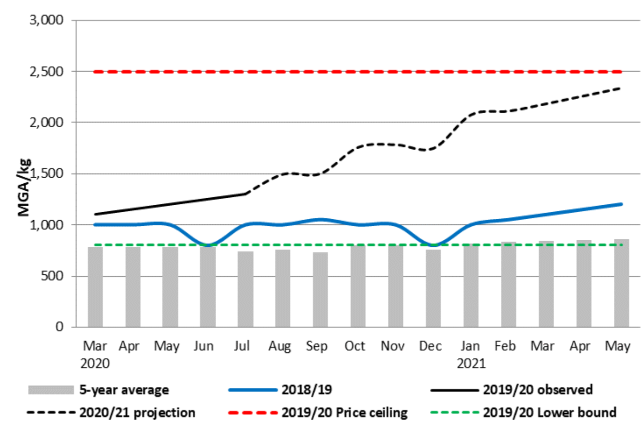
- **Food sources**: Households will depend on purchases until May 2021 except in some area where the water source is stable (like rivers, the coast, or surrounding water sources) allowing for the cultivation of sweet potatoes, maize, and vegetables. In those areas, households will likely harvest in April/May 2021. Some food aid from WFP, CRS, and ADRA will also fill the gap between November and January. For poor and very poor households, wild food consumption will be above average. Otherwise, poor and very poor households will have access to meat/oil/pulses when they participate in the several traditional/funerary ceremonies that will take place until February 2021.

Figure 9. Integrated price projection of maize grain in Ampanihy



Source: *FEWS NET*

Figure 10. Integrated price projection of dried cassava grain in Ampanihy



Source: *FEWS NET*

- **Income sources**: From November to March, the main source of income will be the sale of charcoal, firewood, and wild food for poor and very poor and livestock and meat selling for wealthy households. The income of poor and very poor households will increase with more opportunities like field preparation, higher demand for charcoal during the rainy season (December-March), and increased opportunities after the lockdown. Compared to the reference year, seasonal migration to the north (Majunga, Ilakaka, Morondava, and Tamatave) will be practiced by more households because of effect of the drought and the long-term economic effects of COVID-19. However, opportunities and wages will likely remain below normal as farmers may find it hard to access to seeds after a bad year like the previous one. Poor households will increasingly depend on illegal coping strategies such as animal trafficking as well as illicit fishing, mining, and logging. Households will depend heavily on these strategies for income sources from February to May. For better-off and middle households, sales of small ruminants and poultry will be very important than a normal year because of anticipated high demand for meat with several funeral ceremonies occurring following the easing of COVID-19 restrictions

- **Livestock herds and prices**: Livestock sales will likely continue to seasonally increase up to February 2021 because of earlier and more severe food stock depletion. Therefore, herds will likely decrease as well. Animal prices will be stable because of higher demand despite increasing sales during the lean period. During the rainy period, milk will also be available for consumption and as an income source.

- **Humanitarian Assistance**: As part of the insurance ARC, FID, CPGU, ONN, BNGRC, and WFP will distribute unconditional cash transfers for two months, followed by cash for productive assets to about 48,000 people representing about 13 percent of the total population from November 2020 to February 2021. Treatment of Severe and Moderate Acute Malnutrition and distribution of drinking water will also accompany these distributions. WFP, ADRA, Land o' lakes and CRS will likely assist more than 25 percent of population in the district with GFD, FFA, and MAM prevention with a ration of 15 days from November to January. Meanwhile, WFP, ONN, The Ministry of Public Health, and UNICEF will undertake MAM and SAM prevention and treatment throughout the outlook period. Finally, ADRA, CRS, and WFP will target more than half of primary public schools through May 2021.

- **COVID-19**: Movement restrictions for persons to and from most affected cities will likely remain lifted to allow for temporary migration from the district as usual to look for jobs in farther districts during the lean season. The flow of goods will likely resume to normal. Between February and May 2021, the medium-term and cumulative impacts on the economy and the delay in re-establishing regional and national trade will affect households during the rainy lean season.
- **Pastures and water availability**: Pastures are expected to continue deteriorating until November because of the end of the dry season. Water availability will also likely worsen. Water prices will likely remain stable. From February to May 2021, with near normal expected rainfall, water availability will likely improve, and prices will likely decrease.

Most Likely Food Security Outcomes

According to key informants, following the impact of drought in early 2020 on the tuber crop season, very poor households in Ampanihy are currently reducing the frequency of their daily meals to one per day. Diets are also not very diversified and consist of cheaper foods such as cassava leaves accompanied by dried cassava. Consumption of wild foods partially meets energy needs. Sending children to eat with other wealthier households is also practiced. Additionally, poor households are turning to illegal activities to meet their needs; households are logging in protected areas for firewood and making furniture, illegally trafficking tortoises, and people are turning to fishing during the hot season, when it’s banned due to harmful algae in the water. With the ongoing COVID-19 public health emergency, the government is unable to control and respond to the illegal activities despite pressure to do so. More than 60 percent of households in the five most drought-affected communes of the district have poor food consumption score, which represent 21 percent of total population in Ampanihy district. According to the HEA outcome analysis, most very poor households are facing moderate to severe food consumption gaps in the absence of assistance. The majority had to adopt livelihood based coping strategies like reducing non-food expenditures related to health and education to below-average levels. In addition, very poor households have exhausted the sale of their livestock and are forced to go into more debt compared to previous months, pawn their land more than in a normal year, and engage in illegal activities such as making charcoal or mining, which are among urgent coping strategies. The proxy-GAM is above 10.7 percent in October and increasing admission rate to CRENAM (MAM treatment) and CRENAS (SAM treatment) centers are observed. Ampanihy district is experiencing area-level Crisis (IPC Phase 3) acute food insecurity in October 2020, with households in Emergency (IPC Phase 4).

Between October 2020 and January 2021, very poor household food consumption will likely improve given the food assistance distribution and increased labor opportunities for very poor people who will buy more pulses with cooking oil. With planned humanitarian food assistance, poor and very poor household will not need to adopt severe coping strategies. Very poor households will likely be able to restock their poultry. Acute malnutrition prevalence based on MUAC will likely remain below 15 percent. With the likely large-scale distribution of assistance from November to January, the district will likely experience Stressed! (IPC Phase 2!) acute food insecurity between October 2020 and January 2021 with an important contribution of the humanitarian assistance. In February and March 2021, food consumption of very poor households will likely further deteriorate with an important reduction of ration frequency and size and a notable increase of wild food consumption. Very poor households will likely start to sell their assets again, as well as their animals. Other strategies that are adopted by very poor households in Ampanihy will be to engage in agricultural labor with the expected near normal rainy season, to sell wild food, like cactus, to do petty trades, to intensify selling charcoal and firewood, to beg, to illicitly explore of forest/maritime area and to temporary migrate to Tulear and Ilakaka where opportunities will be lower than usual. With an expected global acute malnutrition rate near 15 percent, the district will likely face area-level Crisis (IPC Phase 3) acute food insecurity between February and May 2021, with households in Emergency (IPC Phase 4).

Other areas of concern

MG 26: Anosy cassava, maize and livestock

Staple food prices: Food prices are currently very high in the zone and becomes inaccessible to very poor households who already have limited income sources. Cereal prices were 20 to 40 percent above the five-year average in Amboasary in September 2020 while those of tubers were more than 100 percent above the five-year average, because of below-normal local production. Compared to last year, when production was better, near the reference year, prices are 50 to 100 percent higher for cereals and 70 percent higher for tubers.

Nutrition Outcomes: The massive screening conducted by the Nutrition Cluster in southern Madagascar using MUAC in September showed that the Global Acute Malnutrition (proxy-GAM) prevalence was 10.2 percent in in Amboasary and set the district in a serious situation of acute malnutrition mainly due to a severe effect of the dryness on crop production and a reduction in water availability. Compared to 2018 and 2019, the situation in Amboasary, particularly in the northern communes of the district, has deteriorated. This prevalence is high compared to the last four years and is expected to remain at this elevated level between October 2020 and March 2021.

Humanitarian assistance: Most of humanitarian assistance that is ongoing in the zone addresses acute malnutrition. According to the nutrition cluster bulletin, more than 40 percent of children screened in SAM (Severe Acute Malnutrition) in the district were admitted to the CRENAS (center to treat severe acute malnutrition) with Plumpysup and Plumpynut, and children in MAM (Moderate Acute Malnutrition) were admitted to CRENAM, and managed by WFP or ACF. In September, WFP distributed a one-month ration of pulses, rice, cooking oil, fortified maize, and soya flour, to 150 households (around 750 persons) in two fokontany (Marovahatse and Ifotaka) in Ifotaka commune of Amboasary Sud. In October, the government also distributed in three communes: Ebelo, Ifotaka and Behara. The ration per households was five bags of 200g of pasta, one bag of potatoes, and three cans of tuna.

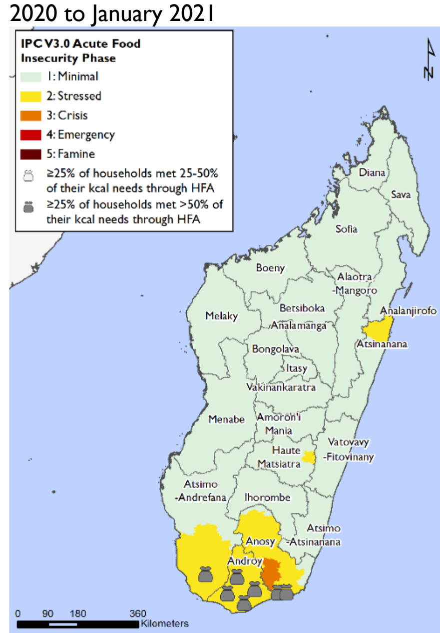
Most Likely Food Security Outcomes

In **MG 26: Anosy cassava, maize and livestock,** the food insecurity situation has deteriorated very quickly after the end of the harvest because the effect of dryness in early 2020 in that area was more severe and reduced production by half. Therefore, the area is facing Crisis (IPC Phase 3) acute food insecurity in October 2020 and between October and January 2021 as planned humanitarian assistance will likely not cover more than 25 percent of population. With the severity of lean season, the area will likely remain in Crisis (IPC Phase 3) acute food insecurity situation between February and May 2021.

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.

Projected food security outcomes, October 2020 to January 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.