SOUTHERN AFRICA Food Security Outlook — October 2021 to May 2022

Crisis (IPC Phase 3) outcomes expected during the lean season in drought and conflict-affected areas

KEY MESSAGES

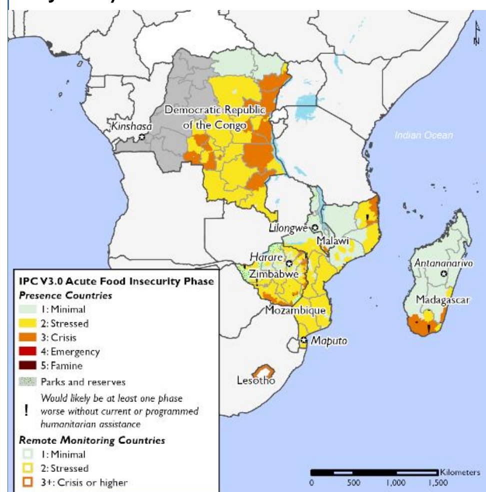
- Owing to the favorable 2021 harvest, households in most parts of the region are still consuming own produced staple and continue to experience Minimal (IPC Phase 1) and Stressed (IPC Phase 2) outcomes. Although, in deficit-producing areas of southern Zimbabwe, Lesotho, and Malawi, households are experiencing Crisis (IPC Phase 3) outcomes as the lean season has already begun. In drought-affected southern Madagascar, most poor households rely heavily on food assistance and Crisis! (IPC Phase 3!) outcomes are ongoing. Across the region, these outcomes are expected to continue until the 2022 harvest begins in April as households start consuming own-produced foods.

- Conflict in Mozambique and DRC continues to disrupt livelihood activities and displacement, leading to the loss of typical food and income sources. Households affected by conflict continue to experience Crisis (IPC Phase 3) outcomes as they have little food stocks and low purchasing power. IOM estimates that around 642,000 IDPs in Cabo Delgado are living among host communities or in resettlement areas with little to no access to typical livelihood activities. According to OCHA, in DRC, over 59,000 people are newly displaced, and since October, nearly 135,000 people have returned to their areas of residence in conflict zones of the northeast and center-east. In both countries, Crisis (IPC Phase 3) are expected to continue through May as the agricultural activities are expected to be limited due to insecurity.

- The forecast for 2021/22 rainfall is average to above average. The expected favorable seasonal rainfall will mark the second consecutive good season across much of the region. This is likely to facilitate engagement in agricultural activities. Increased availability of agricultural opportunities will likely help support household income for many poor households.

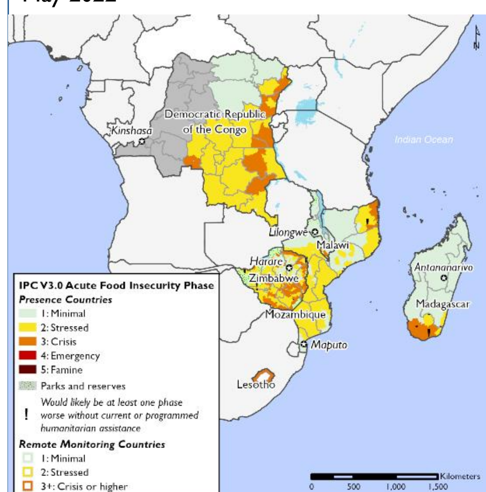
- Staple prices are showing mixed trends across the region. In Zimbabwe, a combination of reduced market supply in southern deficit-producing areas and high national inflation are contributing to increases in staple food prices. Markets in southern Madagascar are also expecting above-average staple prices as market supplies are very low due to the impacts of last year's drought. In Malawi, maize price increases were recorded in half of the monitored markets between August and September; prices remained stable in the rest. Across all markets, prices are expected to remain near the five-year average. In Mozambique, maize grain prices in September were up to 30 percent lower than the same time last year and close to the five-year average due to stable market supply.

Projected food security outcomes, October 2021 to January 2022



Source: *FEWS NET*

Projected food security outcomes, February to May 2022



Source: *FEWS NET*

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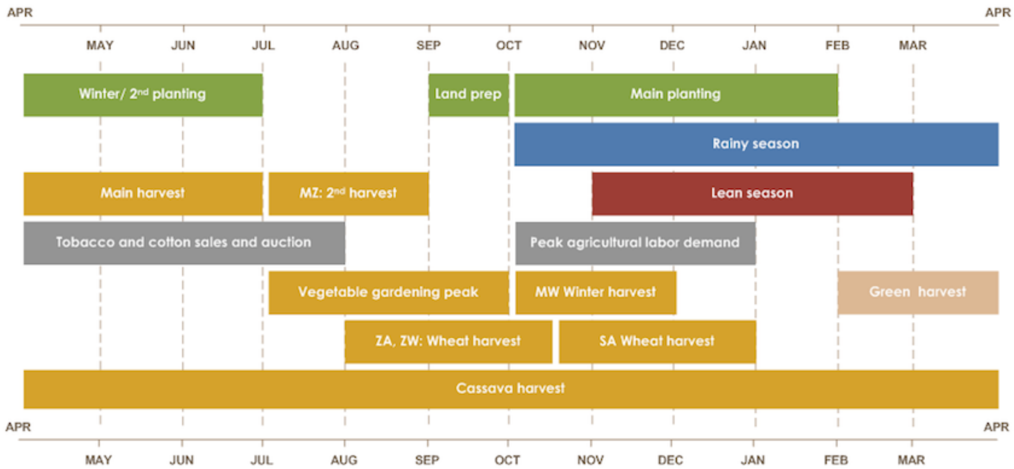
SEASONAL CALENDAR IN A TYPICAL YEAR



Source: *FEWS NET*

OUTLOOK BY COUNTRY

Democratic Republic of the Congo

- Agriculture Season A has started in the north-east and central-eastern areas of the country in a context of persisting insecurity. Based on the NMME and SARCOF forecast models, below-average precipitation is expected in most regions for the period from October to December. These forecasts indicate near-average agricultural activities, with a probability of having lower harvests than previous agricultural seasons.
- Displacement of populations in conflict zones in the north-east and center-east continues to affect people's access to their typical livelihood assets. According to OCHA, In October 2021, the country registered 59,033 newly displaced people and 134,243 returnees. These households, which in most cases do not participate in ongoing agricultural activities, will face food consumption deficits.
- Faced with an early onset to the lean season, household food security in the east of the country will remain a concern. In some areas worst affected by conflict, households will experience food consumption deficits and will remain in Crisis (IPC Phase 3). On the other hand, other areas of the center-east and south-east, with minimally adequate consumption during the lean season, will face Stressed (IPC Phase 2) outcomes.

To learn more, see the October 2021 Democratic Republic of Congo Food Security Outlook.

Madagascar

- Large-scale humanitarian assistance has been ongoing in southern Madagascar in mid- and late 2021, and available information suggest assistance will continue throughout the 2021/22 lean season. While Emergency (IPC Phase 4) outcomes were initially anticipated in the absence of assistance, the large-scale and widespread delivery of food assistance is supporting improvement to Crisis! (IPC Phase 3!) outcomes. Available information on food security outcomes collected in late 2021 suggests that food assistance is mitigating worse outcomes across much of southern Madagascar. Despite area-level Crisis! (IPC Phase 3!) outcomes, data also point to the likelihood that there remain households in Emergency (IPC Phase 4) even in the presence of assistance. The highest populations in Emergency (IPC Phase 4) are likely in Ampanihy and Tsihombe districts.
- Forecasts indicate that October 2021 to May 2022 rainfall is likely to be average across the country. Despite forecast average rainfall, poor households in southern Madagascar continue to face difficulty accessing seeds and other necessary inputs due to very high costs. As a result, production across the south is expected to remain in line with levels that are well below the long-term average. Continued poor production across southern Madagascar will lead to staple food prices that continue to be above average. Food security is still expected to improve in mid-2022 with increased food available from the harvest, but assistance needs will remain higher than is typical for the harvesting period.

To learn more, see the October 2021 Madagascar Food Security Outlook.

Malawi

- In large part due to above-average 2020/21 crop production, most rural poor households have adequate access to food and income and are not facing acute food insecurity (IPC Phase 1). Most of the country is likely to remain in Minimal (IPC Phase 1) throughout the projection period. However, poor households in Nsanje and Chikwawa districts of the Lower Shire livelihood zone will deteriorate to Crisis (IPC Phase 3) around November/December due to below-normal production. While it was previously thought Stressed (IPC Phase 2) outcomes would prevail in Chikwawa through October 2021, updated analysis indicate a transition to Crisis (IPC Phase 3) starting in November. Poor households who faced income losses associated with the pandemic are recovering and will be in None (IPC Phase 1), though some worst affected households in urban centers will experience Stressed (IPC Phase 2) outcomes.
- Since September 2021, the retail prices of maize have trended below last year and the five-year average. While maize price increases were recorded in half of the monitored markets between August and September, prices remained stable in the other half. Prices are also below the government-set minimum farmgate price of 150 MWK/kg and far below the newly set retail price by the government owned Agriculture Development and Marketing Cooperation (ADMARC) of 205 MWK/kg. Based on FEWS NET's integrated price projections, maize prices are likely to remain average to below average throughout the projection period, despite seasonal increases.
- Forecast models indicate La Niña conditions are likely during the outlook period, driving average rainfall with the possibility of above-average rainfall. This forecast coupled with good access to fertilizers and seeds for subsistence farmers through the government's Affordable Inputs Program (AIP) suggest a third consecutive above-average agricultural production year is likely in 2021/22.

To learn more, see the October 2021 Malawi Food Security Outlook.

Mozambique

- Most households in rural areas face None (IPC Phase 1) or Stressed (IPC Phase 2) acute food insecurity outcomes as the lean season starts, supported by their food stocks and food purchases in local markets. Stressed (IPC Phase 2) outcomes persist in areas that have been impacted by natural disasters over the last three years, but outcomes are expected to improve in April 2022 supported by a forecast average rainy season and harvest. In Cabo Delgado, Crisis (IPC Phase 3) outcomes persist in conflict-affected areas where the IOM estimates that around 642,000 IDPs in Cabo Delgado are living with host families or resettlement areas with little to no access to their basic livelihood activities. In urban and peri-urban areas, most poor households are likely Stressed (IPC Phase 2) as COVID-19 control measures and below-average economic activity impacts household purchasing power, with the most vulnerable households likely in Crisis (IPC Phase 3).
- In Cabo Delgado, there are reports of some IDPs returning to their areas of origin to assess livelihood opportunities (agriculture, fishing, trade), the impact of the conflict on their properties, and the possibility of returning with their families. However, most IDPs are expected to remain in conflict-free areas of Cabo Delgado through the 2021/2022 rainy season due to security concerns. In late October, the government began distributing seeds and other agricultural inputs to IDPs to increase agricultural production and reduce food insecurity concerns. However, humanitarian food assistance needs will likely remain high until at least the harvest in May 2022. The World Food Programme (WFP) is anticipating more than 930,000 IDPs and host families in Cabo Delgado, Niassa, and Nampula to likely require HFA through May 2022. However, due to limited resources, WFP plans to continue providing half monthly rations equivalent to 39 percent of daily kcals until January 2022. WFP plans to resume full distribution following the results of an ongoing vulnerability-based targeting exercise. Other humanitarian organizations are likely to provide food assistance to accessible areas in coordination with district authorities.
- The forecast average rainy season is likely to support average crop production for the 2021/2022 agricultural season across most of Mozambique. However, there is a moderate to high-risk probability of flooding, which could lead to crop loss in the nearby lowland areas, including the Maputo, Umbelúzi, Incomati, Limpopo, Búzi, Púnguè, Savane, and Licungo river basins. To reduce the risk of flooding, the Pequenos Libombos dam authorities in Maputo have increased discharges by more than 130 percent to build retention capacity to accommodate upstream flows through the upcoming rainy season, as the dam is at 91 percent of capacity at the start of the rainy season.
- From August to September, the price of maize grain had a mixed trend, with most markets showing stable prices. However, maize grain prices did decrease in some markets by 6-7 percent due to local supply and demand changes. Compared to last year, maize grain prices in September are 8-27 percent lower across all monitored markets, likely

reflecting the larger national grain supply. Compared to the five-year average, maize grain prices in September had a mixed trend with market prices ranging from similar to the five-year average, 11-25 percent below the five-year average and 6-24 percent above the five-year average. Maize meal and rice prices had a stable trend from August to September.

To learn more, see the October 2021 Mozambique Food Security Outlook.

Zimbabwe

- Favorable 2021 harvests follow an above-average 2020 cropping season, improving outcomes across much of Zimbabwe. However, widespread Stressed (IPC Phase 2) outcomes still prevail in October as poor households are affected by macroeconomic challenges and COVID-19 related income losses. Crisis (IPC Phase 3) outcomes are expected to emerge in deficit-producing areas after October, as own-produced stocks deplete, and will persist through the peak of the lean season in March 2022. Food assistance in some areas will improve outcomes to Stressed (IPC Phase 2!). Most surplus-producing areas will experience Minimal (IPC Phase 1) or Stressed (IPC Phase 2) outcomes, while urban areas are expected to be Stressed (IPC Phase 2) as poor households continue to face challenges meeting basic food needs amid low incomes and above-average prices.
- Parallel market exchange rates will likely remain the main driver of price increases, despite government efforts to stem inflation. High and increasing prices of food and non-food commodities, mainly in ZWL, are expected throughout the outlook period, negatively affecting market access among poor households who earn income in ZWL. Despite favorable harvests, staple grain supply on the open market will likely remain below normal levels, given the directive for farmers to sell maize to the Grain Marketing Board (GMB) and contractors. Some markets in deficit-producing areas are expected to have little to no grain through March 2022; maize meal will therefore be the main source of cereal.
- Rainfall during the 2021-2022 season is forecast to be above-average, which is anticipated to support near-normal agricultural labor opportunities. The income earned from this labor, coupled with last season's average or above-average production, is expected to support relatively favorable food security outcomes across much of Zimbabwe. Humanitarian food assistance needs are expected to be at their lowest levels in recent years. However, macroeconomic conditions remain poor, following the impacts of the COVID-19 pandemic on top of persistent currency shortages. High food prices will limit food access during the lean season, especially for poor households in deficit-producing areas.

To learn more, see the October 2021 Zimbabwe Food Security Outlook.

Countries Monitored Remotely[i]

Lesotho

- As the lean season begins, household food stocks from own production are low, with reliance on markets for food increasing. While imports from South Africa are available and support normal market supply, high food prices and lower than average income continues to drive low purchasing power. This is expected to drive Crisis (IPC Phase 3) outcomes through the lean season in southern parts of Lesotho. In the rest of the country, Stressed (IPC Phase 2) outcomes are expected.
- Above-average rainfall is expected for the 2021/22 season. As there has been some rainfall in October, farmers are starting land preparation activities, especially in the mountains, where farming activities typically begin around October. Farming activities for the 2021/22 season are expected to be normal, but due to the high cost of inputs, area planted is likely to be lower than last year and below average.
- Households typically rely on casual labor opportunities, including farming and labor migration to South Africa. Off-farm labor opportunities remain below average due to the compounding effects of COVID-19 restrictions locally and cross-border travel to labor markets in South Africa. Despite South Africa easing travel restrictions and reopening its economy, the level of remittances to Lesotho remains below average.

To learn more, see the October 2021 Lesotho Remote Monitoring Report.

EVENTS THAT MIGHT CHANGE THE OUTLOOK

Table 1. Possible events over the next eight months that could change the most-likely scenario.

Area	Event	Impact on food security outcomes
Southern Africa	Poorly distributed rains between November and February	If 2021/22 rainfall is poorly distributed or a poor start to the season, this could result in below-average production. There is the potential for limited improvements in acute food insecurity in the post-harvest period if the harvest is very poor. As a result, Crisis (IPC Phase 3) outcomes or worse could persist.

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.

[i] *With remote monitoring, an analyst typically works from a nearby regional office, relying on a network of partners for data. Compared to countries above, where FEWS NET has a local office, reporting on remote monitoring countries may offer less detail.*