

*Below-average production expected across the region due to the effects of drought and flooding*

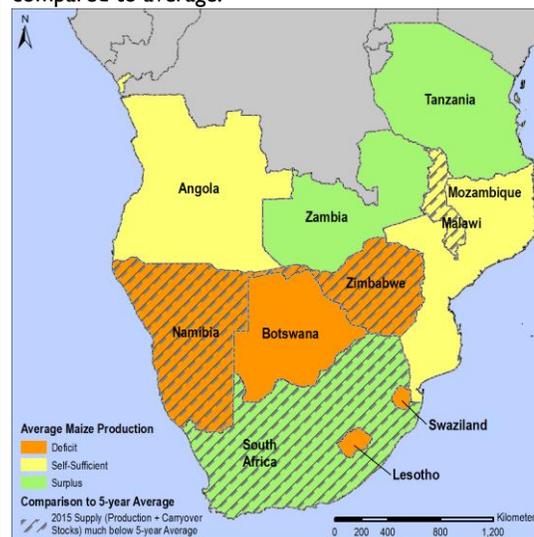
This season's crop performance was poor across much of southern Africa, particularly in the region's surplus-producing areas. Preliminary estimates indicate that national maize harvests in South Africa and Malawi were the lowest in more than five years. However, as a result of above-average carry-over stocks from the 2014/15 marketing year, aggregate regional supply is expected to be near average. Countries with significant production deficits this year, including Malawi and Zimbabwe, will likely experience an early start of the lean season and limited food access for poor households. As a result, more than three million people are expected to face Stressed (IPC Phase 2) or Crisis (IPC Phase 3) food insecurity between July 2015 and March 2016. As production figures remain preliminary, the results of upcoming national vulnerability assessment committee (VAC) assessments should be closely monitored.

Across much of the region, the start of the southern Africa monsoon season in November/December 2014 was delayed and erratic. Then once rainfall did begin, its spatial and temporal distribution was poor. Southern Malawi and north/central Mozambique experienced abnormally heavy rainfall in mid-January, resulting in flooding, crop losses, and the displacement of approximately 650,000 people. Meanwhile, eastern South Africa, northern Malawi, Lesotho, southern Zimbabwe and Mozambique, Botswana, Namibia, and unimodal areas of central Tanzania experienced long periods of dryness and atypically high temperatures which led to large moisture deficits and failed crops.

In flooded areas of Malawi and Mozambique, many displaced households completely lost their livelihoods. Even with current humanitarian assistance, the worst-affected households are Stressed (IPC Phase 2!) as of June. Across the region, many rural poor households in drought-affected areas will also see a decline in their incomes due to very limited wage labor income that typically comes from better-off households. In the absence of humanitarian assistance, food security is likely to decline further for both drought- and flood-affected households over the coming months. Areas of southern Zimbabwe and southern Malawi are likely to be classified as Crisis (IPC Phase 3) by July. Other areas of these two countries, plus areas of Lesotho, Tanzania, and Zambia are likely to be Stressed (IPC Phase 2). These levels of food insecurity are likely to persist through March 2016 and could worsen depending on the performance of the 2015/16 rainy season.

Despite the poor crop production, aggregate regional maize supply over the 2015/16 marketing year is expected to be less than five percent below average due to the presence of very large regional carry-over stocks. However, the capacity of South Africa to fill regional grain deficits is significantly below 2014/15 levels and the five-year average. Countries experiencing significant deficits this year (Malawi and Zimbabwe) may need to compete for Zambian and Tanzanian maize with higher income consumers from structurally deficit countries in East Africa.

**Figure I.** Estimated 2015 regional maize supply compared to average.



**Table I.** Estimated regional maize supply.

Country	Average maize production	2015 maize supply <sup>1</sup> vs. the 5-year avg.
Angola	Self-sufficient	63%
Botswana	Structurally deficit	8%
Lesotho	Structurally deficit	-4%
Malawi	Self-sufficient	-23%
Mozambique	Self-sufficient	2%
Namibia	Structurally deficit	-23%
South Africa	Surplus producing	-16%
Swaziland	Structurally deficit	-4%
Tanzania	Surplus producing	20%
Zambia	Surplus producing	13%
Zimbabwe	Structurally deficit	-35%

<sup>1</sup>Estimated production plus carryover stocks  
 Source: FEWS NET

Availability and prices of maize and key substitutes should be monitored closely during the post-harvest period in order to identify any localized market disruptions or areas where atypical price movements might further weaken household purchasing power. National VACs are currently carrying out assessments that will identify food insecure areas, indicating food needs that will inform response planning for the 2015/16 consumption year. The results of these assessments should also be closely watched.