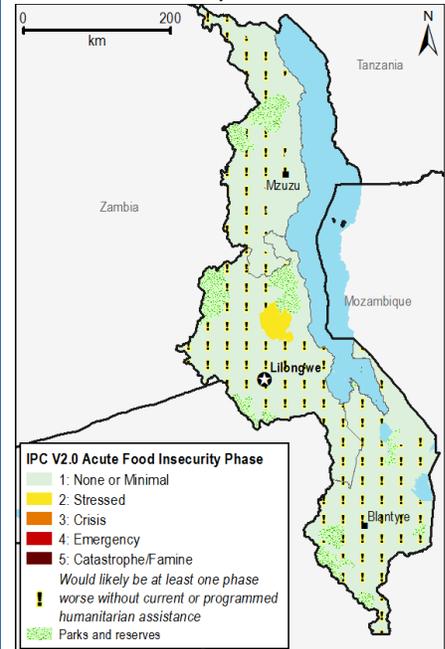


Maize supplies continue to be tight during the final months of the 2015/16 marketing year

KEY MESSAGES

- Most of the country is facing Minimal (IPC Phase 1!) acute food insecurity outcomes, in the presence of humanitarian assistance. Poor households that are not receiving humanitarian assistance are experiencing Stressed (IPC Phase 2) outcomes due to livelihood protection deficits because of high prices and lower than normal earnings from agricultural labor due to El-Niño induced drought conditions in the central and southern region.
- The magnitude of maize price increases this year is atypical. In January, prices ranged from 190 – 243 MWK/kg. In comparison to last year, the percentage increase is between 85 – 155 percent higher. The prices of maize grain are expected to continue trending significantly above average for the entirety of the Outlook period. In the absence of additional imports, subsidized maize supplies through ADMARC depots are estimated to run out in March, about one month before the harvest is expected to begin.
- Minimal (IPC Phase 1!) food security outcomes are only expected to continue through March, in the presence of assistance. There is the possibility that assistance will also continue in April, but additional information is still forthcoming. By April, in the absence of any assistance, food insecure districts in the central and northern regions of the country will be in IPC Phase 2 and outcomes in the south will deteriorate to IPC Phase 3. These outcomes will improve after the harvest in May, and Phase 1 and Phase 2 outcomes are expected in areas from June to September.

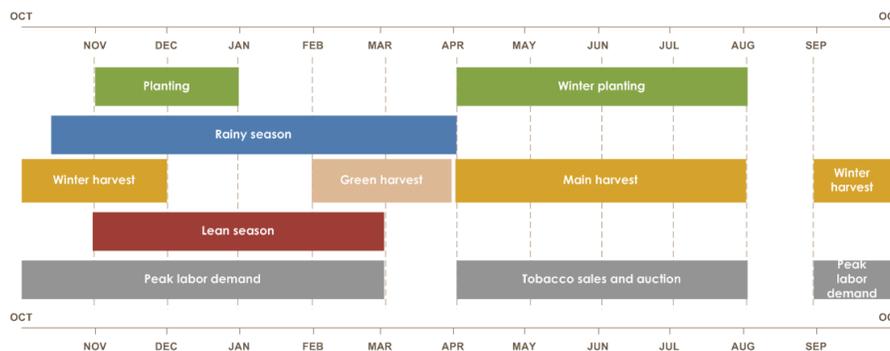
Current acute food security outcomes, February 2016.



Source: FEWS NET

This map represents acute food insecurity outcomes relevant for emergency decision-making. It does not necessarily reflect chronic food insecurity. Visit [here](#) for more on this scale.

SEASONAL CALENDAR FOR A TYPICAL YEAR



Source: FEWS NET

NATIONAL OVERVIEW

Current Situation

After a poor 2014/15 production season due to flooding and dry spells, national maize supplies continue to be tight during the final months of the 2015/16 marketing year. Formal and informal maize imports, as well as humanitarian distributions of maize, are not substantial enough to fill the national maize deficit. The availability of maize is significantly below average in most households. Poor households that are not receiving assistance are relying on food purchases for their basic needs, however food access through purchases is constrained due to high maize prices, including prices for maize alternatives like cassava and beans.

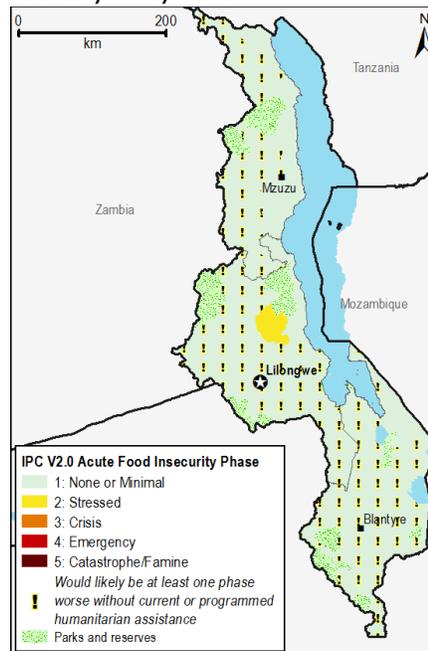
Most of the country is facing Minimal (IPC Phase 1!) acute food insecurity outcomes, in the presence of humanitarian assistance. Poor households that are not receiving humanitarian assistance are experiencing Stressed (IPC Phase 2) outcomes due to livelihood protection deficits because of high prices and lower than normal earnings from agricultural labor. Humanitarian assistance was rolled out to 25 districts that were identified during the annual Malawi Vulnerability Assessment Committee (MVAC) in mid-2015. The current food security outcomes are only expected to continue through March. There is the possibility that assistance will also continue in April, but additional information is still forthcoming. By April, in the absence of any assistance, food insecure districts in the central and northern regions of the country will be Stressed (IPC Phase 2) and outcomes in the south will deteriorate to Crisis (IPC Phase 3).

Between November 1, 2015 and January 31, 2016, central and southern parts of the country received 50-79 percent of average rainfall, while most of the northern region received 80-120 percent of average rainfall within the same period. Most farmers reported late access to inputs through the Farm Input Subsidy Program (FISP) as well as lack of access to alternative sources. While farmers normally receive FISP inputs in October and December, as of mid-January a significant numbers of farmers still had not received inputs. In order to plant, farmers were forced to use recycled seeds which are known to reduce yields. Most farmers also failed to apply fertilizers on time due to the extreme dry conditions prevailing across central and southern Malawi areas, resulting in poor crop development.

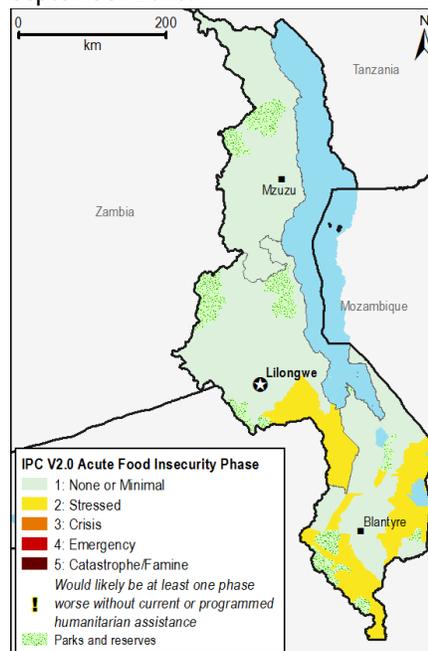
The Malawi SGR maize stocks are at their lowest in years. The Strategic Grain Reserve (SGR) which stood at about 86,000 MT for the 2015/16 consumption season released a total of 84,000 MT of maize that was committed for humanitarian assistance programming that began in October/November 2015 and is planned to conclude in March 2016. The SGR has nearly distributed all of its stocks. Carryover stocks are expected to be below average going into the next marketing year.

Maize prices typically increase between December and January, but the magnitude of the increase is atypical this year. January prices ranged from 190 – 243 MWK/kg. In comparison to last year, the percentage increase was between 87 – 156 percent higher. FEWS

Projected acute food security outcomes, February - May 2016.



Projected food security outcomes, June - September 2016.



Source: FEWS

NET

This map represents acute food insecurity outcomes relevant for emergency decision-making. It does not necessarily reflect chronic food insecurity. Visit [here](#) for more on this scale.

NET assessments in mid-January found maize prices in some markets are more than double the 2015 prices and up to 170 percent higher than the five-year average.

ADMARC is continuing to sell subsidized maize, but due to high demand they have requested an additional 18,000 MT of maize so that they can continue selling. Field observations and media reports are showing that most households are failing to access the subsidized maize with very poor and poor household members spending as much as 3 nights in line for maize. In the absence of additional imports, ADMARC supplies are estimated to run out in March, which is about one month before the harvest is expected to begin.

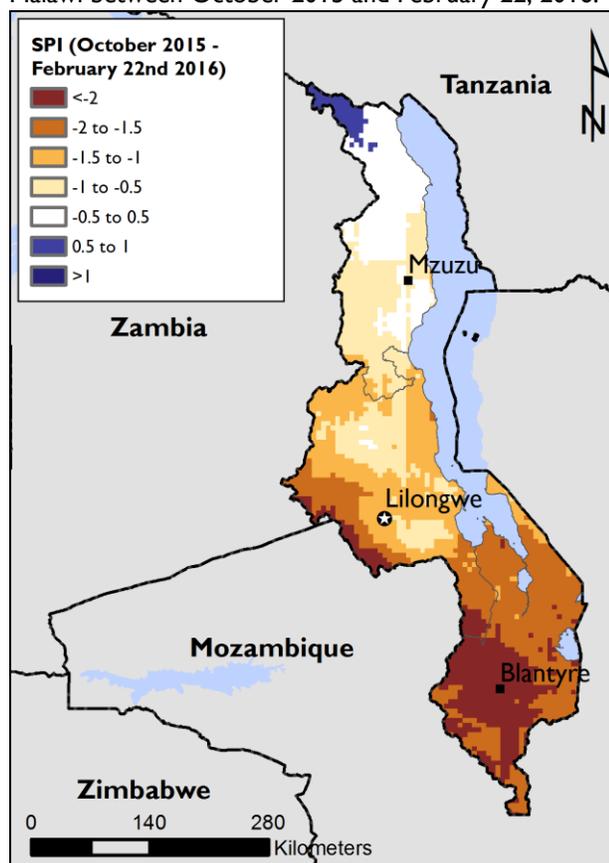
Earlier, FEWS NET reported that the planned humanitarian assistance programming would stop after February due to funding gaps and pipeline breaks. Based on the latest information from partners, assistance programming will continue into the month of March. In-kind rations for March will include the distribution of a 50 kg bag of maize (from the 84,000 MT committed by the SGR) and nearly the same amounts of the other items included in earlier rations.

National Level Assumptions

The Food Security Outlook for February to September 2016 is based on the following national-level assumptions:

- 2015/16 seasonal progress:** Based on the latest national forecast by the Malawi Department of climate Change and Meteorological Services, the country is likely going to receive below-normal rainfall up to the end of the rainy season, with a likelihood of an early cessation of rains in late February or early March. The Standardized Precipitation Index (SPI) monitors the severity of drought events. The SPI for rainfall from October 2015 to February 2016 ranges from moderately to extremely dry (Figure 1). These dry conditions will exacerbate the poor crop conditions that have resulted from a late start of the current season, poor access to agricultural inputs, and prolonged dry spells in the December to January period. While rains in the northern region started on time, rains in the central and most of the southern region began a month later than normal. Subsequent rainfall across the entire country was erratically distributed in both space and time (Figure 2). Dry spells have contributed to poor seed germination and the need to replant crops. By late December and early January, the area planted in the northern and central regions had dropped slightly to 90 percent of average. In the southern region, the area planted is around 60 percent, well below average.

Figure 1. The Standardized Precipitation Index (SPI) for Malawi between October 2015 and February 22, 2016.



Source: USGS/EROS/FEWS NET

- National crop production prospects:** are likely going to be low owing to drought conditions in the central and southern region, as well as reduced access to subsidized inputs through the FISP program. Ministry of Agriculture district reports from a sample of districts in central and southern region are already estimating production

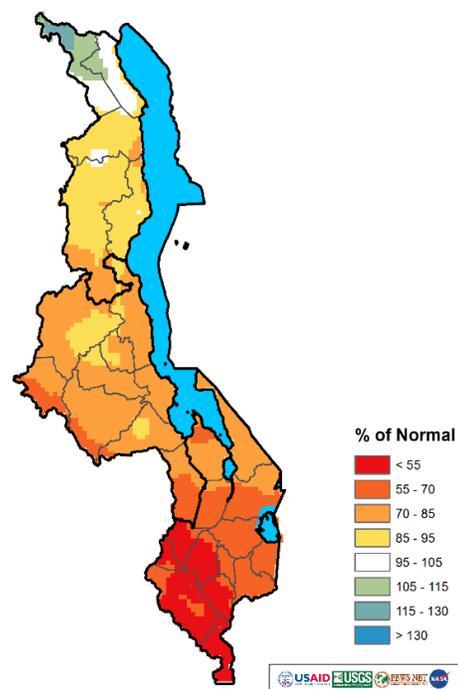
reductions similar to or worse than the 2014/15 production season due to below normal rainfall. Production of main food crops such as maize, sorghum, millet, and pulses is expected to be 25 to 35 percent below normal. Production for tobacco is estimated to decrease 5-10 percent of average, while cotton is estimated to be 30-50 percent of average. Access to green crops and the main harvests will be delayed by one month. Green crops will be accessed in late march and main harvests in May due to the delayed start of season. Assessments in January showed that most crops across all regions were in the early development stage in January. During this month crops are typically much further along and in the early maturity stage of development. This delay is due to poor germination, permanent wilting, and the replanting of crops.

- Food availability between February and May 2016:** Zambia's recent suspension of maize exports will decrease informal trade flows to Malawi between February and April. It is assumed that both informal and formal imports to date is not enough to cover the national cereal gap. Until the main harvest in April/May, the country will continue to face a maize deficit of approximately 360,000 MT. Recent FEWS NET assessments have shown that many households are relying on market purchases, and this is expected to continue through April/May. Households may also access some modest green crops for consumption in March. However, green crop access will be significantly below average owing to the estimated below average production. ADMARC maize availability is expected to be erratic during this period due to abnormally high demand this consumption year.

June - September 2016: The Malawi SGR stock levels will remain well below average up until the start of purchases from farmers during the July/August period. SGR carryover stocks will be less than 5,000 MT during the harvest period in April/May.

- June to September maize availability:** After the start of the harvest in April/May households will be consuming food from their own production. Being around harvest time, households will be consuming food from own production in the May to September period which will see reliance on market purchases ease and this can stabilize prices at the current above average levels. Since crop conditions this season have been so poor, the normal period in which households typically consume their crops is expected to be much shorter during the 2016/17 consumption year. Between June and September period, below normal imports are expected due to below average regional maize supplies. As a result of this, significantly below average trade is expected between Malawi and neighboring Tanzania and Mozambique. There is little likelihood that Malawi will formally import any maize to fill the national food gap that is expected during the 2016/17 consumption year.

Figure 2. Malawi percent anomaly for October 2015 – February 2016 based on average cumulative rainfall for 1982-2011.



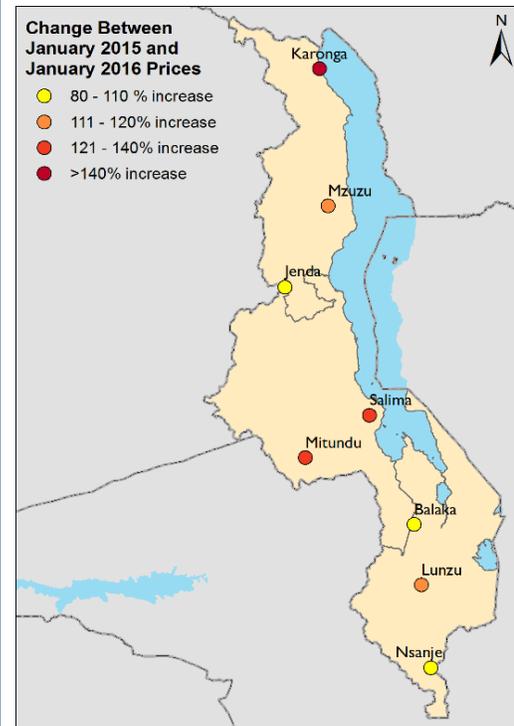
Source: USGS/EROS/FEWS NET

- Formal maize imports:** Malawi is likely going to register reduced maize imports due to reduced forex earning prospects. It is estimated that tobacco production may reduce by about 10 percent due to below normal rainfall. The Tobacco Control commission also projects that demand for Malawi tobacco has fallen by about 12 percent which may lead to lower prices of the major forex earner from which Malawi realize about \$335 to \$340 million per year. Other major forex earning cash crops such as tea and cotton are reported to also have registered significant production reductions of up to 40 percent as compared to normal which will worsen foreign exchange earning opportunities. Malawi maize imports will also be affected by the suspension of exports to Zimbabwe and Malawi by Zambia which would entail increased import parity should maize grain be imported from areas

with higher prices or covering long distances. Low national stocks in the absence of formal imports could also lead to ADMARC the national grain marketing board having lower stocks than demand which could trigger further price increases as has been the case between November and January.

- Household Purchasing power:** Between February and September, household purchasing power will be eroded due to the expected continuation of the depreciation of the local currency. Normally, Malawi earns most of its foreign exchange revenue through tobacco sales during the June/July period, but since tobacco crop production this season is expected to be below average. The Malawi Kwacha has undergone a significant depreciation of about 53 percent from January 2015 to January 2016. Due to the anticipated poor production season especially in central and northern Malawi, and high inflation caused by the steep depreciation of the Malawi Kwacha, food prices will remain atypically high and may not decrease seasonally in the May to September harvest and post-harvest periods.

Figure 3. Maize price changes between January 2015 and January 2016.



Source: Malawi Ministry of Agriculture IFEWS NET

- Maize Prices and market performance:** The prices of maize grain are expected to continue trending significantly above average (Figure 3). Maize prices will be more than double the recent five year average (100-200 percent higher) between February and April. Prices may stabilize or continue increasing between February and April. The seasonal price decline that follows anticipated harvests in March may be delayed because of anticipated late availability of harvests. Between May and September, prices will remain significantly above average. Stability in prices may be experienced between May and June when availability is typically highest. Prices may stabilize or continue increasing between February and April. Below average differentials due to depreciation of the Malawi Kwacha may also make it unattractive for traders to import Zambian maize. The maize imports especially through informal cross border trade from Mozambique and Zambia are likely going to increase seasonally but will be below average due to low production in the areas that border Malawi.
- Income Availability:** Despite projected increases in crop prices, incomes from tobacco in central and northern Malawi and incomes from cotton mainly in southern in addition to other sellable crops will still be below average. During the February to April period as well as the May to September period, poor and very poor household cash access will be below average due to a reduction in agricultural labor availability as well as significant reductions in the volume of key cash crop sales in central and southern Malawi. The below normal rainfall and drought conditions are significantly reducing agricultural labor access. The influx of people looking for labor and lower than normal incomes among the wealthier households has affected wages with those offering labor paying lower wages ranging from 75 to 80 percent of normal.
- Humanitarian Assistance:** The humanitarian assistance program for about 2.8 million people that started in October will continue to protect livelihoods and improve food consumption gaps for the majority of very poor and poor households in 25 out of 28 districts in Malawi through March, with the possibility of being extended into April. Targeted households are being given a month's ration of maize, pulses, and vegetable oil where in-kind transfers are being implemented, or a cash equivalent where cash transfers are being implemented. Humanitarian Assistance programs are currently not planned, funded, or likely during the period following the harvest in May (June-September).

Most Likely Food Security Outcomes

Most households across the country are experiencing Minimal (IPC Phase 1!) outcomes in the presence of humanitarian assistance in the form of food rations or cash. If this assistance was not there, Crisis (IPC Phase 3) outcomes would persist throughout the southern region, and Stressed (IPC Phase 2) in the central and northern region. These improved outcomes are expected to continue through March, and assistance could possibly extend to April. If there is no continued assistance after March, IPC Phase 2 and 3 outcomes are expected between April and May. Livelihood protection deficits and food consumption gaps will improve across most of the country between May and September when households in the north and central regions access food from their current harvests, however, some areas will remain Stressed (IPC Phase 2) during this period.

AREAS OF CONCERN

Northern half of Kasungu Lilongwe Plain (KAS) Livelihood Zone

Focus on Kasungu District

(Dowa and Mchinji Districts)

Current Situation

Kasungu district lies within the surplus producing Kasungu-Lilongwe Plain livelihood zone. During the previous 2014/15 season, Kasungu District registered production decreases with key food and cash crops recording decreases ranging from 20 to 30 percent. The district produced 203,853 MT of maize against a five year average of 277,740 MT. In this livelihood zone, tobacco is the main cash crop, although maize, sweet potatoes, groundnuts, and soya beans are all sold as well. Small herds of cattle, goats, and pigs along with flocks of chickens are commonly kept. The zone is usually a surplus-producing area, with much of the local produce sold to Lilongwe. This surplus is typically produced by better-off households that have access to seeds, fertilizer, and the means to hire labor, while the middle income households produce enough food to cover their needs, and poor households usually produce enough to cover about 60-70 percent of their needs in a good year. In order to cover cash requirements for food purchases, poor households typically rely on being hired by better-off households for local farm labor or on tobacco estates. Households in KAS are mainly relying on market purchases to access food after obtaining incomes mainly through doing agricultural labor and selling of firewood and charcoal. About 12 percent of the households are benefitting from humanitarian assistance in form of food or cash.

The timing of the start of the 2015/16 rainy season in Kasungu district was 20-30 days later than normal. Subsequent rainfall distribution has been erratic and rainfall amounts continue to be below average. Even though the soils in this livelihood zone are relatively fertile sandy loams, the dryness has had an adverse impact on area cropped, seed germination, and crop development. According to cumulative RFE (mm) data for Kasungu district, there were deficits in rainfall amounts in November, December, and January.

The terms of trade in Kasungu district had deteriorated between the baseline years of 2014/15 to 2015/16 consumption year. For instance while the price of goats had increased in nominal terms from MWK 11,000 in the baseline year to MWK 14,000 in the current year, the money realized from goat sales can only buy 93 percent of the maize it could but in the reference year.

ADMARC markets selling subsidized maize are sparsely supplied in urban centers, while rural outlets are receiving no supplies. Private trader prices are high in rural markets, which is reducing household purchasing power. Based on household interviews conducted in January, households are also travelling long distances to access maize in trading centers along the main M1 road. Maize is readily available in main markets but stocks are dwindling due to scarcity in source markets especially across the border in Eastern Zambia. The availability of maize in remote markets is low or nonexistent, forcing household members to travel long distances of up to 25 km to buy maize. Most traders are reporting that they have started sourcing their maize from Zambia through informal trade. Maize prices are

increasing steeply as traders from Lilongwe City and the southern region compete to source maize from Kasungu district. Current maize prices at Kasungu market are about 44 percent above the five-year average and nearly double prices around this time last year

Household interviews showed that agricultural labor opportunities are much lower than normal due to the poor start of season where crops for farmers who offer labor had either not been planted or were suffering from moisture stress thereby discouraging further work in the face of severe dry spells. FEWS NET assessments in January found that most able bodied men especially in northern parts of Kasungu had migrated to Nkhotakota on the shores of Lake Malawi or Chikangawa forest reserve in Mzimba district to seek labor as there were no labor opportunities within the district. The shortage of labor opportunities was exacerbated by poor conditions for the transplant of tobacco.

Under the current humanitarian assistance programming, approximately 12 percent of the population in Kasungu district is receiving some kind of assistance. Of this population about 20,976 people are receiving food assistance this month. Households are receiving one 50 kilogram bag of maize, 6 kilograms of beans and 2 liters of vegetable oil per month. Additionally, about 76,781 people are receiving the equivalent in cash transfers in areas with functional and well supplied markets.

Current Food Consumption: According to FEWS NET's HEA outcome analysis very poor households are facing a food gap of approximately 17 percent during the 2015/16 consumption year. This gap is expected to be more pronounced during the lean season months when food supplies are at their lowest and food prices are at their highest. Household interviews by FEWS NET in early January showed that most poor and very poor households are consuming maize meal or *nsima* with vegetables. Most very poor and poor households that were failing to buy maize were consuming nsima made of maize husks (maize leftovers after pounding for fine flour called *madeya*). Maize husks are normally thrown away or fed to live stock but are now being sold for food due to maize scarcity. In December, some households in northern Kasungu were surviving on consumption of boiled mangoes. Households also reported consuming one meal per day as compared to the normal 2-3 and spending several days per month without any meals. Middle and better-off households consumption is acceptable. They are consuming maize meal with side dishes of vegetables and proteins such as beans, peas, fish, and occasional meat.

In Kasungu, food consumption among 12 percent of the population that is receiving some type of humanitarian assistance is at acceptable levels. These households are consuming maize meal, pulses, vegetable oil and vegetables that they receive in-kind transfers or through purchases.

Current Livelihoods Changes: Due to erratic rainfall and drought conditions this season, there is a shortage of farm labor and non-farm labor opportunities that the very poor and poor populations usually fill. Households reported increased sales of small livestock (chickens and goats). An increased number of able bodied household members are migrating to the Nkhotakota district to seek labor in sugar estates and with the cassava crop. Some are also migrating to Mzimba district to seek labor in timber plantations for cash and food. Normally, households seek local labor or migrate to neighboring Zambia, however local dryness and drought in Zambia is limiting these opportunities. Middle and better off households are managing to obtain incomes from what was saved from previous tobacco crop sales. They are also managing to sell livestock (goats) in order to make food purchases.

Assumptions for Kasungu Lilongwe Plain (KAS) Livelihood Zone

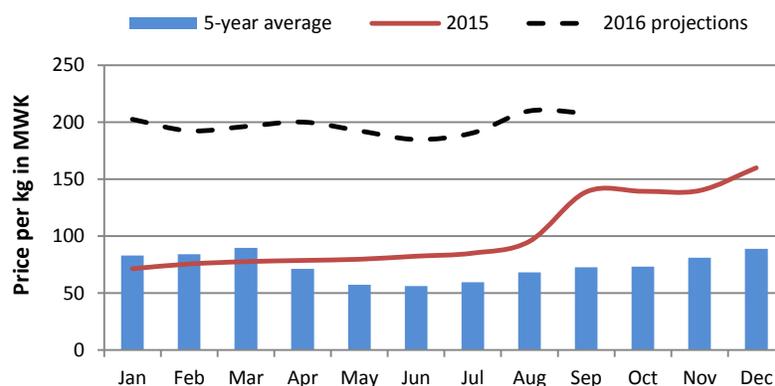
In addition to the national assumptions the following assumptions were used to complete HEA outcome analysis KAS between February and March 2016, and between April and September 2016:

- **Agroclimatology and Crop Production:** The 2015/16 rainfall for the Kasungu-Lilongwe Plain livelihood zone is expected to remain unfavorable, which could lead to a consecutive below-average cropping season. The main planting rains in the zone were more than a month late and significantly below normal and erratically distributed. According to district agriculture reports, by end-January the district had received mean rainfall of 228.2 mm against normal rainfall of 463.1 mm representing a 51 percent reduction. First round crop estimates

show that 212,554 MT of maize will be produced against a baseline total of 278,994 MT representing a 23 percent reduction unless rainfall performance improves. First round production figures for 2016 tobacco the main cash crop show an estimated 20 percent reduction with other key crops such as groundnuts and purses also registering 25 percent and 27 percent reductions respectively. Estimates for tubers show production to be the same as the five year average. However, the continued dry and hot conditions may also negatively affect their production.

- Food Availability:** Very poor and poor households finished consuming their crops from the 2014/15 season several months earlier than normal this consumption year because production was below average. In February, the majority of households continue to make market purchases for their food needs. With the delayed start of season by almost a month, access to green consumption will be delayed and is expected to occur in late March and early April. Households will also face delayed access to harvested crops. The main harvest is expected in May instead of April, prolonging the lean period for the 2015/16 consumption season. Private traders will continue to transport supplies to this area from central and northern parts of Malawi, as well as from neighboring Zambia. ADMARC food supplies from February to April will not cover all needs. ADMARC will likely continue to supply most of their larger urban posts, while in rural areas maize supplies will be scarce. Households across all wealth groups will realize some modest harvests in May which will cover household needs for the May to September period and beyond.
- Household Incomes:** Due to the very dry conditions this season and the expected reduction in crop sales, farm labor availability, and lower than normal livestock prices, most poor and very poor households are expected to realize only 67 -75 percent of the incomes that they would typically earn through farm labor between February and April. Some very poor and poor household members will continue migrating to other districts and livelihood zones to seek agricultural and other labor opportunities. Income usually earned from crop sales in the May to September period will be below average as prospects for tobacco, the area’s main cash crop, and other sellable food crops are projected to be below average.

Figure 4. Kasungu maize price trends and projections (MWK/kg).



Source: Malawi Ministry of Agriculture/FEWS NET

- Food Prices:** Maize prices will likely remain at levels that are double the previous year and the five-year average between February and March and continue to increase. Prices for alternative food such as sweet potatoes and cassava will also be about double the five year average. From April to September maize prices remain atypically high when normally they would decrease significantly after new harvests when more households consume own produced food and ease the pressure on markets. In the February to March period, prices will remain high due to high demand against low supply, higher prices of imported maize from Zambia and general inflation due to the steep depreciation of the Malawi Kwacha. In the April to July period, prices will remain high even after harvest due to a projected reduction in most food crops as a result of below normal rainfall in addition to high inflation.

- Humanitarian assistance is now expected to end in March, and will possibly extend to April.

Most Likely Food Security Outcomes

In the February to April period, households will be consuming maize meal with vegetables as gravy with no diversification in diet. Number of meals taken per day will be reduced to one from the normal three. Some households will be consuming boiled vegetables as a full meal with no starch which will provide no significant kilocalories for survival. Most poor households will be spending one to three days in a week without taking any food as they go in search of labor for food and as some queue at ADMARC markets for as much as three days to buy subsidized maize. Food consumption will be poor.

In the May to September period which is within the harvest and post-harvest period, household food consumption will significantly improve as household get access to diverse foods. Households will also realize modest incomes that will enable them to buy other foods. Households will be eating the main staple made of maize with diverse additional dishes of beans, fish, and some meat. Households will also have access to cassava, sweet potatoes, and ground nuts. They will also be in a position to purchase alternative processed foods such as cooking oil and some sugar.

In the February to April period, households in this zone normally have adequate food from their own production and reasonable incomes from crop sales. Very Poor and Poor households supplement this income by engaging in agricultural labor, selling of small livestock and exploiting natural resources such as firewood and charcoal sales. In the February to April 2016 period, household members that live near forests will increase sales of firewood and charcoal. Since most income generating opportunities have been exhausted in the zone, FEWS NET assessments in January have shown that able bodied household members will continue migrating to the lake district of Nkhotakota and to the neighboring Mzimba to seek labor opportunities in cassava fields and timber plantations respectively.

In the June to September period, household members will switch from migrating to seek labor from outside the zone to selling some sellable food crops as well as some cash crops. They will access enough cash to fulfill purchase of basic non-food items. Those with minimal cash will also have increased opportunities to earn incomes buy engaging in agricultural labor such as harvesting of food crops and tobacco. Opportunities for labor in irrigated cropping labor and processing of tobacco in readiness for marketing will also be available in the zone.

Lower Shire Valley (LSH) Livelihood Zone

Focus on Nsanje district

(Chikwawa district)

Current Situation

During the previous 2014/15 season, Nsanje rainfed production was 79 percent of average, and the irrigated maize was 14 percent above five year average production. Lower Shire Valley livelihood zone is an annual food deficit zone. Currently the majority of households are relying on market purchases for their food supplies.

The timing of the start of the 2015/16 rainy season in Nsanje ranged from slightly early to average, however subsequent rainfall distribution has been erratic and rainfall amounts continue to be below average. These conditions have led to poor germination of the planted crops and wilting of others. According to cumulative RFE (mm) data for Nsanje district, rainfall in early December helped to offset moisture deficits, however as of late January the total rainfall amount is about 70 percent of average (RFE mean, 2001-2010).

Terms of trade has deteriorated in Nsanje district. In the reference year a household could sell one goat and be able to buy 115 Kilograms of maize while currently a household can sell one goat and be able to buy only about 35 Kilograms of maize.

Maize availability in local markets is lower than normal and is available only in major markets, while in smaller markets supplies are scarce. People are travelling long distances to access the maize at these major markets. Most of the maize being sold in these major markets is coming from Mchinji and Dowa districts in the central region.

ADMARC posts are the only available source of subsidized maize in the district. Due to high demand, as well as low and erratic supplies, maize rationing is being reduced from 20 kg/person to 10 kg/person.

Current maize prices continue to be very high. Average prices in this district are at MWK 240/kg, which is nearly three times the five-year average (MWK 84/kg).

Under the current humanitarian assistance programming, 84,722 people are receiving food assistance this month. Households are receiving one 50 kilogram bag of maize, 6 kilograms of beans and 2 liters of vegetable oil per month. Each month 25,219 people are receiving the equivalent in cash transfers. In total approximately 39 percent of the population is receiving some form of assistance.

Maize availability in local markets is lower than normal and is available only in major markets, while in smaller markets supplies are scarce. People are travelling long distances to access the maize at these major markets. Most of the maize being sold in these major markets is coming from Mchinji and Dowa districts in the central region.

ADMARC posts are the only available source of subsidized maize in the district. Due to high demand, as well as low and erratic supplies, maize rationing is being reduced from 20 kg/person to 10 kg/person.

Current maize prices continue to be very high. January average maize prices at Nsanje main markets were at MWK 240/kg, which is nearly three times the five-year average (MWK 84/kg). Terms of trade has deteriorated in Nsanje district. In the reference year (2013/14 consumption year) a household could sell one goat and be able to buy 115 Kilograms of maize while currently a household can sell one goat and be able to buy only about 35 Kilograms of maize.

Household interviews conducted by FEW NET in January showed that food consumption was poor among poor households that are not currently receiving any form of humanitarian assistance. Poor households are consuming maize meal or *nsima* with wild vegetables, indicating very little dietary diversity. Some households reported going without a meal at least 4 times in one month. Middle and better-off households also reported that they are consuming mostly maize and vegetables, with little dietary diversity as well. They also indicated that they are reducing the number of meals that they are consuming from 3 to 2 meals/day and sometimes to even 1 meal/day. Income from livestock sales is almost nonexistent due to a ban on livestock sales because of foot and mouth disease that is attacking livestock in the district.

Current Food Consumption: According to FEWS NET's HEA outcome analysis very poor households are facing a food gap of approximately 19 percent during the 2015/16 consumption year. This gap is expected to be more pronounced during the lean season months when food supplies are at their lowest and food prices are at their highest. Household interviews conducted by FEW NET in January showed that food consumption was poor among most poor households that are not currently receiving any form of humanitarian assistance. Poor households are consuming maize meal or *nsima* with wild vegetables, indicating very little dietary diversity. Some households reported going without a meal at least 4 times in one month. Middle and better-off households also reported that they are consuming mostly maize and vegetables, with little dietary diversity as well. They also indicated that they are reducing the number of meals that they are consuming from 3 to 2 meals/day and sometimes to even 1 meal/day.

Current Livelihoods Changes: Due to erratic rainfall and drought conditions this season, there is a shortage of farm labor and non-farm labor opportunities that the very poor and poor populations usually fill. As a result, there are reports of atypical migration to nearby Mozambique in search of weeding labor opportunities. Middle and better off households are hiring fewer people for weeding because of the abnormal dryness this season.

Livestock sales are the largest source of income for better off households and an important income source for middle households in normal years, but due to an outbreak of foot and mouth disease the movement of livestock has been

banned, and this has substantially reduced any income that might be received through livestock sale for these households, with the exception of chicken sales.

Assumptions for Lower Shire Valley (LSH) Livelihood Zone

In addition to the national assumptions the following assumptions were used to complete HEA outcome analysis for LSH between February and March 2016, and between April and September 2016:

- **Income availability:** Due to the very dry conditions this season, most poor and very poor households are expected to only earn half of the incomes that they would typically earn through farm labor between **February and April**. Income earned from livestock sales between February and March will be nearly nil for poor households because they have no stocks to sell due to consecutive years of poor crop production. The current Foot and Mouth Disease outbreak and government restrictions on sales of livestock will have a negative impact on middle and better off households that typically sell their large livestock to cover food costs. Harvest labor as well as irrigated production labor will remain below average between **April and September**, and incomes from cash and food crop sales will be significantly lower than usual from **May to September**. Recent first round estimates for cotton are just around 6 percent of the five-year average.
- **Food availability:** Very poor and poor households finished consuming their crops from the 2014/15 season several months earlier than normal this consumption year because production was below average. In **February**, the majority of households continue to make market purchases for their food needs. Typically, households begin to consume green crops in February, but this will likely be delayed by one month, along with the main harvest. Despite the rains starting almost on time, there were a number of long periods of dry spells in between before the rains resumed in mid-January. This forced farmers to replant for more than three times until mid-January. So, households will also need to continue to make market purchases for the months of **March and April**. Private traders will continue to transport supplies to this area from central and northern parts of Malawi, as well as from neighboring Zambia and Mozambique. ADMARC food supplies from **February to April** will not cover all needs. ADMARC will likely continue to supply most of their larger urban posts. Middle and better off households will realize some modest harvests in **May** which will cover household needs for the May to September period and beyond.
- **Staple food retail prices:** Maize prices will remain around double February to May 2015 prices and more than double the five-year average for this period. This is due to dwindling market supplies that are below average because of the production deficit the country recorded in the 2014/15 production season as well as increased number of households relying the market for their food purchases due to the delay in green and main harvest. Prices for alternative food such as sweet potatoes and cassava will also be about double the five-year average. From June to September period food prices especially for the maize staple will likely remain atypically high. Prices may also not decrease following the normal seasonal trends during the harvest and post-harvest periods due to the anticipated production shortfalls caused by below normal rainfall and low access to agricultural inputs.
- **Humanitarian assistance:** Assistance is now expected to end in March, and will possibly extend to April.

Most Likely Food Security Outcomes

February is the peak lean period in Nsanje district and the whole livelihood zone as well as the whole of the southern region. Poor and very poor households will have livelihood protection and survival food deficits. National production during 2014/15 was below average and household demand has been higher than normal for much of the 2015/16 marketing year, pushing up prices. These prices are expected to continue to be high from February to March. FEWS NET projections in February show that maize prices in Nsanje are likely going to range from MWK 250.00 per Kilogram in February which is 164 percent higher than the five year average and gradually increase to around MWK 260.00 per kilogram in April before they start decreasing in May to MWK 250.00 as farmers start harvesting in May.

All of these factors together with a reduction in income from agricultural labor and livestock sales will likely reduce access to food for most of the very poor and poor households. Households are there going to have poor food consumption eating mostly once a day as compared to the normal two meals during this period and some are likely going to go without a single meal sometimes. Very poor and poor households will face crisis (IPC Phase 3) food security outcomes.

Between May and September, households food consumption is expected to improve as these households are expected to be consuming own produced food. Although own produced food for most of

the very poor and poor households is expected to run out by August due to anticipated production deficits caused by strong negative E Nino conditions the country is experiencing. During the period May to September income from Cotton sales which is the main cash crop in the district will be almost nonexistent due to anticipated huge production decrease which is almost just 6 percent of the five year average. With a reduction in household income and anticipated below average production very poor and poor households are likely to face stressed (IPC Phase 2) food security outcomes.

OTHER AREAS OF CONCERN

Lake Chilwa-Phalombe Plain Livelihood zone

(Phalombe, parts of Mulanje, Chiradzulu, Zomba, and Machinga districts)

Middle Shire Livelihood Zone

(Balaka, parts of Blantyre and Neno and districts)

Phirilongwe and Southern Lake Shore Livelihood zones

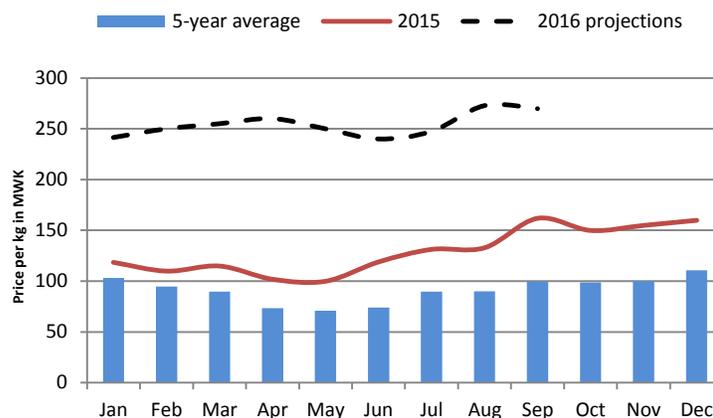
(Mangochi district)

Current Situation

The four livelihood zones in southern Malawi are rain shadow areas which have been suffering consecutive food insecurity in the past five years. The zones also suffered from the impacts of flooding and drought in the 2014/15 production season leading to many very poor and poor households requiring humanitarian assistance in the 2015/16 consumption year. Just as is the case with most areas in southern Malawi, these areas have also been affected by a delayed start of season of close to a month and below normal rainfall which has led poor crop production prospects. In the 2015/16 rainfall season, these zones have received mean rainfall ranging from 160-300 mm against 340-780 last year and 650-850 mm normal rainfall. The majority of very poor and poor households that realized below normal production due to below normal rainfall in the 2014/15 production season are benefitting from the current humanitarian assistance in form of cash and in-kind transfers. The households will facing Minimal (IPC Phase 1) food security outcomes up to end February and likely to remain in this phase in March as long as the ongoing humanitarian assistance program continues.

Prices for the staple maize in markets across these zones averaged about MWK 223/kg with some markets registering prices as high as MWK 266/kg. This is limiting food access to those households relying on markets for food but are not benefitting from humanitarian assistance. Those very poor and poor households which are not benefitting from

Figure 5. Nsanje maize price trends and projections (MWK/kg).



Source: Malawi Ministry of Agriculture/FEWS NET

humanitarian assistance are limited to consumption of maize meal and vegetables and at times skipping meals for a day or two.

Most Likely Food Security Outcomes

Very poor and poor households will continue relying on humanitarian assistance between February and March, will have limited access to green foods in April, followed by access to the main harvests in May. They are likely going to consume own produced food from May to September. During this period households may start running out of own produced food due to poor production. Food security outcomes will remain Minimal (IPC Phase 1!) with humanitarian assistance through March. A combination of Stressed (IPC Phase 2) and Minimal (IPC Phase 1) outcomes are likely between May and September.

EVENTS THAT MIGHT CHANGE THE OUTLOOK

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

Area	Event	Impact on food security outcomes
Areas of concern	Early cessation of rains that can lead to significant crop failure leading to minimal or no harvests	Projected improved food security outcomes in the harvest and pre-harvest periods would not be attainable.

ABOUT SCENARIO DEVELOPMENT

To project food security outcomes over a six-month period, FEWS NET develops a set of assumptions about likely events, their effects, and the probable responses of various actors. FEWS NET analyzes those assumptions in the context of current conditions and local livelihoods to develop scenarios estimating food security outcomes. Typically, FEWS NET reports the most likely scenario.