Key Messages

- Following below-average 2014/15 production in several southern African countries, regional cereal stocks have fallen approximately 15 percent below average. Among the surplus producing countries, South Africa and Zambia also experienced below-average production, contributing in large part to a regional cereal supply deficit of above 1.3 million tons. Individual countries facing significant cereal deficits this marketing and consumption year include Zimbabwe, Malawi, Madagascar, Lesotho, and Swaziland.

- Poor households in southern parts of Zimbabwe, Malawi, Zambia, Madagascar, Lesotho, and Angola finished their own production stocks earlier than normal and will have an earlier lean season this year. Stressed (IPC Phase 2) outcomes are expected in the countries from July to September. As regional cereal supplies decrease and prices increase, the situation will likely deteriorate to Crisis (IPC Phase 3) acute food insecurity from October to December in these areas. Elsewhere in the region, households are expected to experience Minimal (IPC Phase 1) acute food insecurity outcomes between July and December.

- As the 2015-16 agriculture season draws nearer, there is a 90 percent chance that an El Niño will develop during the October to December period. Historically, El Niño conditions are associated with below-average and erratic rainfall in the southeastern parts of the region during this period. These conditions might result in a late start of season in the southern parts of Mozambique, Malawi, and Zimbabwe, which could limit labor opportunities. If these El Niño conditions were realized during the 2015-16 season, this would be the second consecutive year of poor rainfall for southern parts of the region.

Outlook by Country

Malawi

- Following a poor 2014/15 production season, FEWS NET estimates that this year’s national maize deficit is approximately 500,000 MT. Currently, households are dealing with high staple food prices at the same time that their incomes are sharply dropping. Poor households in southern and central areas affected by severe flooding earlier this year and extended dryness at the end of the season will be Stressed (IPC Phase 2) between July and September. Poor households in northern areas affected by drought will face similar acute food insecurity outcomes.
• Between July and September, poor households will likely earn less from food and cash crop sales due to reduced 2014/15 production levels. Additionally, prospects for the irrigated/winter production are poor due to low moisture availability, increasing pressure on incomes.

• As competition for labor rises between October and December, some households anticipate migrating to Mozambique and Zambia to find work. However, prevailing El Niño conditions in the southern region might result in a late start of season, which could limit labor opportunities and further reduce household income.

• Between October and December, households in the southern and central areas will require humanitarian assistance as they continue to experience livelihood protection deficits and food consumption gaps. They will be in Crisis (IPC Phase 3). Households in the north and some parts of the central region will begin to experience livelihood protection deficits and will be Stressed (IPC Phase 2).

To learn more, read the complete Malawi Food Security Outlook.

Mozambique

• The majority of rural households in the country are currently facing Minimal acute food insecurity outcomes (IPC Phase 1). Households are meeting their basic food needs through continued food availability in markets, access to a variety of own produced foods, as well as post-flood production, and in some cases second season production. However, very poor households in some of the drought affected areas in parts of Inhambane, Gaza, and Sofala Provinces are facing Stressed acute food insecurity outcomes (IPC Phase 2) and are in need of humanitarian assistance to protect their basic livelihoods.

• The lean season is expected to start in some areas of the country in September, a month earlier than average. From July - December, Stressed (IPC Phase 2) acute food insecurity outcomes will persist in areas in the southern region. Income from labor and other livelihood activities will not be enough to cover both food and non-food essentials. Very poor households will expand their typical livelihood strategies in order to meet their food requirements but with above-average food prices, they will likely continue to face livelihood protection deficits.

To learn more, read the complete Mozambique Food Security Outlook.
Zambia

- During the July to December outlook period, acute food insecurity is expected to remain Minimal (IPC Phase 1) for most parts of Zambia. Starting in August, some parts of Western, Southern, and Eastern Provinces will begin facing Stressed (IPC Phase 2) acute food insecurity.

- Where deficit rainfall disrupted livelihoods especially in Western and Southern Provinces and parts of Eastern Province, the VAC has recommended relief food assistance. Listing of beneficiaries will commence in July and a voucher system will be used to improve targeting.

- Given the high demand for Zambian maize, the below-average harvest, and recent fuel price increases, maize prices are expected to atypically increase by August. Prices are expected to be above the previous season’s level and the recent five-year average through December 2015.

To learn more, read the complete Zambia Food Security Outlook.

Zimbabwe

- Households in most southern provinces are currently facing Stressed (IPC Phase 2) outcomes, which are expected to deteriorate to Crisis (IPC Phase 3) from October through December. In most northern districts the majority of households are consuming own-produced cereals from recent harvests and are experiencing Minimum (IPC Phase 1) outcomes. However as households finish their own-produced stocks from October onwards, Stressed (IPC Phase 2) food security outcomes are expected through December.

- Most households in the southern areas are increasing reliance on market purchases for staple cereal, which is pushing up prices to levels averaging 38-46 percent above previous year prices and 35 percent above the national average. Due to an undersupply of maize grain on most southern markets during the outlook period, maize meal demand and prices are also expected to increase to levels above the previous year.

- Rural food insecurity for the 2015-16 consumption year is estimated at 16 percent (1.5 million people) of the rural population during the peak lean season from January to March 2016, compared to 6 percent last season. Livelihood options are projected to be constrained in most parts of the country, but especially in the south. Safety-net interventions by the government and partners are limited and lean season humanitarian assistance is expected to be lower than average due to a challenging funding situation.

To learn more, read the complete Zimbabwe Food Security Outlook.

Countries Monitored Remotely

Lesotho

- Minimal (IPC Phase 1) acute food insecurity is expected in most of Lesotho through December as poor households access food through own production, food in exchange with labor, market purchases, and safety nets. Increases in staple food prices will likely result in poor households facing Stressed (IPC Phase 2) outcomes in Qacha’s Nek, Thaba-Tseka, and Mafeteng between Augusts to December.

- Stable food prices have started to increase gradually following below-average local production and increase of prices in South Africa. This trend is likely to reduce the purchasing power of poor, market-dependent households, particularly between October and December.
Ongoing government and partner safety-net programs are expected to provide stable access to food for chronically food insecure households. However, the LVAC estimates 180,000 people will require assistance above current safety nets coverage to meet acute shortfalls following below-average production and increases in food prices.

To learn more, read the complete Lesotho Remote Monitoring Report.

**Madagascar**

- In Androy, Atsimo Andrefana and parts of Anosy Regions, staple food production is estimated to be significantly below average. An early exhaustion of food stocks, reduced coping capacity from the previous lean season, and unusually high staple food prices are likely to result in Stressed (IPC Phase 2) outcomes starting from August and September 2015.

- Where maize production was extremely low (Tshombe and Ambovombe Districts), poor households are currently in Stressed (IPC Phase 2), and but will likely deteriorate to Crisis (IPC Phase 3) as soon as August.

- Based on information collected from local agricultural services, prices of staple foods such as maize remains significantly above average in the southern markets of Amboasary and Ambovombe. Despite decreases in cassava prices likely due to earlier than usual harvests, poor households’ purchasing power is likely to be below average as food stocks are exhausted and households become market dependent as the lean season approaches.

To learn more, read the complete Madagascar Remote Monitoring Report.

**SEASONAL CALENDAR IN A TYPICAL YEAR**
EVENTS THAT MIGHT CHANGE THE OUTLOOK

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

<table>
<thead>
<tr>
<th>Area</th>
<th>Event</th>
<th>Impact on food security outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cereal deficit parts of the region</td>
<td>Reduced Cross border cereal trade from surplus countries to deficit areas.</td>
<td>Significant decrease in market cereal supplies in deficit areas, resulting in atypical increases in cereal prices.</td>
</tr>
<tr>
<td>Madagascar, Zimbabwe, Malawi, and Lesotho</td>
<td>Provision of Earlier than usual Humanitarian interventions/assistance.</td>
<td>Poor and very poor households food gaps will be significantly reduced and household acute food insecurity will be Minimal (IPC Phase 1).</td>
</tr>
<tr>
<td>Zimbabwe and Malawi</td>
<td>Export restrictions by Zambia.</td>
<td>Zimbabwe and Malawi will face significant maize grain deficits since Zambia is the most preferred source of GMO free maize grain imports.</td>
</tr>
<tr>
<td>Increased overseas cereal sales by South Africa</td>
<td>Namibia, Botswana, Swaziland, and Lesotho</td>
<td>Could result in critical cereal shortages within the four countries that rely on South Africa for maize grain</td>
</tr>
</tbody>
</table>

ABOUT THIS REPORT

This report presents FEWS NET’s most forward-looking analysis for acute food security in this region for the outlook period stated above. It is based on the work of regional and national analysts who consider current conditions and local livelihoods in order to develop regional and national level assumptions about the future. The analysts compare these assumptions, their possible effects, and the likely responses of relevant actors to arrive at a most likely scenario for each country. Typically, FEWS NET reports the most likely scenario. Click here for more information.

1 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.