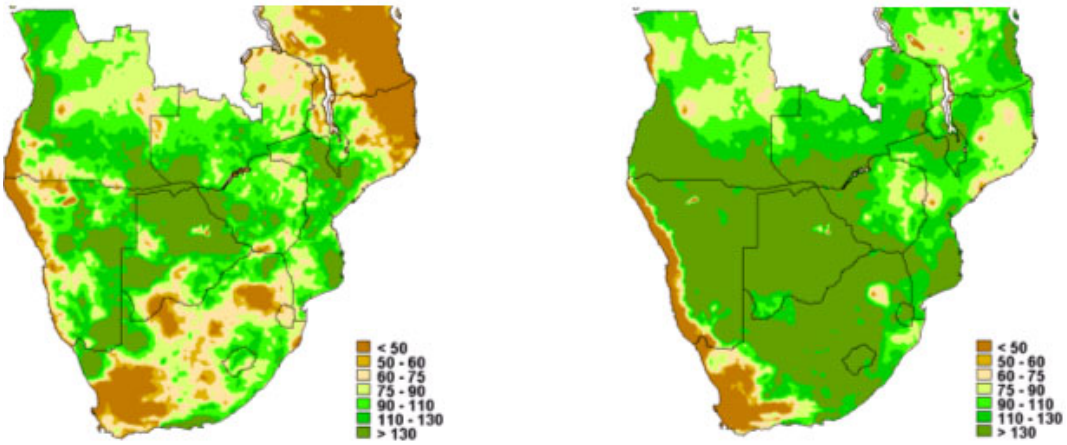
global information and early warning system on food and agriculture

Crop Prospects and Food Situation in Southern Africa

----------April 2006----------

In **Southern Africa,** rainfall, especially during the critical months of January and February, for the main season crops planted in November-December was very favourable. More specifically, central parts of the region has received significant amount of precipitation through out this season. However, erratic rains including some dry spells were experienced on the southern periphery of the region (namely in parts of South Africa, Lesotho, and Swaziland), on the northern periphery (in areas such as northern Malawi, northern Zambia and northern Mozambique) and on the western edge (namely in south west Angola). Estimated cumulative rainfall during the first half and the second half of the season is shown in the satellite images (Figure 1a and 1b) below and the resulting NDVI for the most recent dekad for the region is shown in Figure 2. In much of the central part of the region, good rains not withstanding the yields will also depend on other factors as availability of key inputs (fertilizer, chemicals and/or labour for weeding, etc.). Leaching of nutrients due to excessive rains and waterlogging conditions, at certain times, has been a problem in Mozambique, Malawi, Zimbabwe, Namibia, and Angola among other areas.

Figure 1: Seasonal Rainfall, Percentage of normal (1961-90)
1a: 1 October 2005 – 31 December 2006 and 1b: 1 January – 31 March 2006



Data source: NOAA, FAO; by FAO-SDRN, Agrometeorology Group

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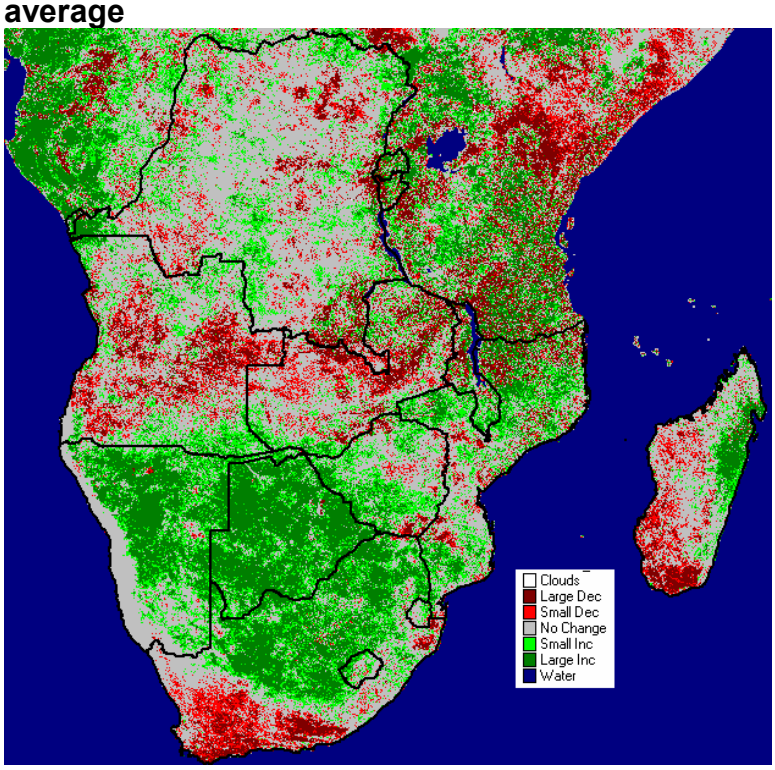
Figure 2: Southern Africa: NDVI April 2006, dekad 1 – difference with long term average



If normal weather conditions prevail for the rest of the season, the outlook for the region's (excluding South Africa) aggregate 2006 maize crop, to be harvested in April-May, is favourable, and output is forecast at 6.9 million tonnes, the largest crop since 2000, about 27 percent over the last year's drought affected output and 21 percent over the past five year average (see Table 1). This mainly reflects a substantial recovery in maize and cereal production from the drought affected previous year in **Botswana, Malawi, Zambia, Zimbabwe and Namibia.** In addition, this early forecast suggests that **Mozambique, Madagascar, Lesotho,** and **Swaziland** are likely to achieve more or less similar outputs as 2005. However, **Angola** due to dry spells and **South Africa** due to reduction in maize planted area, caused primarily by low maize prices in 2005, are forecast to experience reduced cereal harvests this year. Maize production in South Africa is forecast to decline by about 4.7 million tonnes from the year before. However, with current stocks at a record level of over 5 million tonnes (as of 23 February 2006), immediate food security at national and regional level is not likely to be affected drastically. Southwest of Angola, the main cereal growing area in the country, has been experiencing drought since October 2005. More precise evaluation of the situation would be available later since the Crop and Food Supply Assessment Missions (CFSAMs) are planned for Zimbabwe and Angola to be carried out from mid-April to mid-May 2006.

In **Southern Africa**, prospects for planting of the 2006 season from May are favourable, reflecting upward trend in the domestic and international prices since the beginning of the year and improved residual soil moisture. FAO's final estimate of the 2005 wheat crop, harvested last November, is put at 2.1 million tonnes, about 10 percent better than the previous year's drought-affected production. About 90 percent

of the total was accounted for by South Africa, where output increased by nearly 12 percent over previous year's production, although it still remained below the average of the past five years.

Table 1: Southern Africa, maize production: Early 2006 forecast and comparison with 2005 estimates and 2001-05 average

	2001-05 Average ('000 t)	2004 Estimate ('000 t)	2005 Estimate ('000 t)	2006 Forecast* ('000 t)	2006 over 2005 (%)	2006 over Average (%)
Increase in production anticipated:						
Botswana	7	10	4	10	150%	43%
Zimbabwe	844	900	550	950	73%	13%
Malawi	1623	1733	1253	2000	60%	23%
Zambia	906	1300	866	1200	39%	32%
Namibia	33	35	41	45	10%	36%
No significant changes expected:						
Mozambique	1252	1437	1403	1450	3%	16%
Lesotho	103	81	92	92	0%	-11%
Madagascar	274	350	350	350	0%	28%
Swaziland	76	70	82	82	0%	8%
Decrease in production anticipated:						
Angola	549	577	768	700	-9%	28%
South Africa	9796	9710	11716	7000	-40%	-29%
Southern Africa including South Africa	**15463**	**16203**	**17125**	**13879**	**-19%**	-10%
Southern Africa excluding South Africa	5667	6493	5409	6879	27%	21%

Source: FAO/GIEWS

* Assuming normal climatology for the remainder of the season.

Food Security Situation – The hunger season has reached its peak, with household food stocks nearly exhausted. However, early harvest or use of green maize is expected to provide some relief in March-April before the main harvest becomes available. Nearly 12 million people are affected by food insecurity, large number of them in chronic situation, and require emergency assistance in Zimbabwe, Malawi, Swaziland, Lesotho, Mozambique and Zambia. Food shortages are reflected in rising staple food prices, especially in Zimbabwe and Malawi. In **Zimbabwe,** maize price in parallel market was Z$600 000/20kg in first week of March up from about Z$400 000 from the month before. Prices of most cereal based goods seem to have gone up by about one-third in about one month keeping in track with the national inflation rate of over 600 percent. Food aid distributions in February reached 54 000 tonnes and the same levels are planned for March and April. In **Malawi,** total maize import requirements for the 2005/06 marketing year (April/March) were estimated at 767 000 tonnes, of which, so far, only 230 000 tonnes of cereal imports (mostly maize), including about 112 000 tonnes through informal cross-border trade have been recorded. Confirmed food aid pledges as early as mid-November were at around 200 000 tonnes, although the bulk of this food has been very slow to arrive in the country. The World Food Programme under its revised regional Protracted Relief and Recovery Operation for 2005/07 has appealed for US$637 million, of which about 56 percent of the contributions have been made so far.

Regional Balance - Of the total maize import requirement of about 2.8 million tonnes for the subregion, excluding South Africa, for the 2005/06 marketing year (with most common period of April-March), an estimated 1.8 million tonnes of maize have so far been imported commercially, with an additional 555 000 tonnes of cereal food aid (mostly maize) being pledged/received. At the same time, due to a bumper 2005

maize harvest, the closing maize stocks on 30 April 2006 in the Republic of South Africa are projected to be at about 4 million tonnes.

Prospects for the regional food supply in 2006/07 marketing year also look relatively favourable. Total maize supply (2006 production plus the carry over stocks) in the Republic of South Africa is forecast to be about 10.8 million tonnes. Given the estimated utilization of about 8.6 million tonnes (including about 600 000 tonnes of strategic reserves) in that country, the potential exportable surplus is likely to be around 2.2 million tonnes. This surplus would be sufficient to cover the aggregate maize import requirements of other countries of the region which are estimated at about 1.7 million tonnes based on the preliminary forecast of maize production for 2006 and the historical utilization in the region. In anticipation of the reduction in the domestic maize production in South Africa, contrary to the usual post-harvest trend, the SAFEX futures price of white maize is expected to firm up by moving from R1099/t in April to R1163/t in December 2006.

Further information on specific countries can be found on the GIEWS Workstation at:
http://www.fao.org/giews/workstation/page.jspx