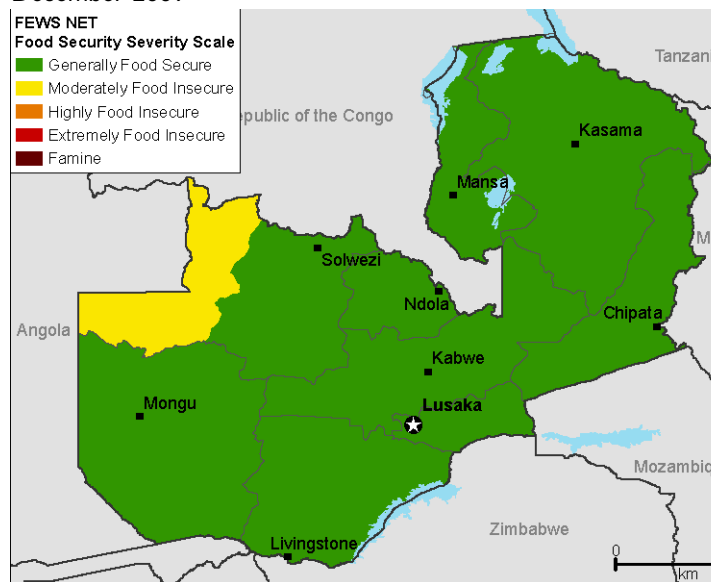


Zambia Food Security Outlook

January 2010 to June 2010

- The food security situation in most parts of the country has remained good. Although maize availability in the public markets has declined, maize meal is readily available in different parts of the country as millers have good maize stocks on hand and can access grain from large traders.
- Between January and March, food security is expected to be generally stable, while an increasing number of households will become market dependent as their household stocks run out and meal prices marginally increase. But by March, the green harvest will be available, reducing pressure on maize meal. Poorer households will mostly rely on labor exchange. Labor opportunities should remain good up to March unless rains become problematic.
- Between April and June, food security is expected to remain favorable in most areas. However, if the dry conditions and poor distribution of rains persist in parts of southern Zambia, the green harvest will be substantially reduced or absent in such areas, creating high dependence on the market. Even then, the market will remain adequately supplied. However, the poorer households in these areas will have difficulty accessing maize from the market. Staple food prices, although lower than last season, are relatively high for a surplus year and will peak at levels above those of recent surplus years.

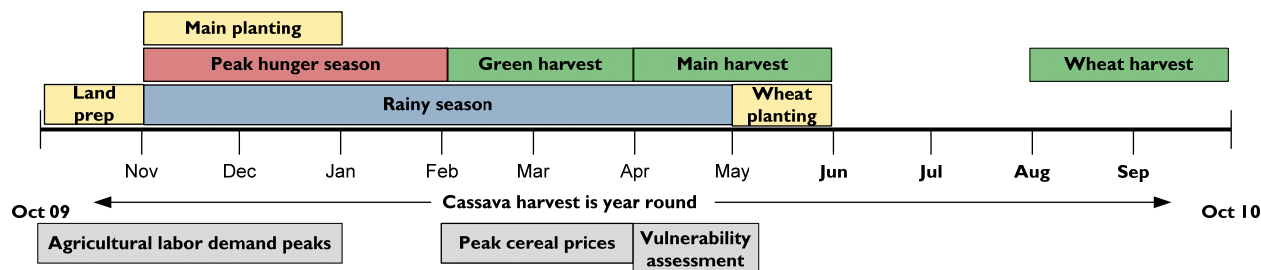
Figure 1. Current estimated food security conditions, December 2009



For more information on FEWS NET's Food Insecurity Severity Scale, please see: www.fews.net/FoodInsecurityScale

Source: FEWS NET and VAC

Seasonal calendar and critical events



Source: FEWS NET

Current food security conditions

Despite this being the hunger period, the food security situation has largely remained good due to the surplus production from the 2008/09 season. Households have had more stocks on hand, which has enabled them to consume own food about two months longer than normal in relatively low producing areas. Better off households have been able to sell more than

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normal, with some sales continuing into December, which is unusual in areas such as Kazungula District (Southern Province), where this was noted.

No calls for food assistance have been forthcoming and consequently, relief operations have been restricted to assisting a few displaced communities (e.g., as a result of moving some people out of Game Management Areas). In December, the Disaster Management Unit pre positioned food in some flood prone areas in anticipation of possible flooding in targeted low lying areas (e.g., valley areas).

Maize and meal prices have remained high despite the surplus production; this has been the trend since the start of the 2009/10 marketing season and can be attributed to the high input prices during the 2008/09 production season. To some extent, these prices remained relatively stable in the months before December — an indication of reliable market supply. Prices have been mostly above normal for this time of year and are expected to remain so until the next harvest. While prices are unusually high for a surplus season, market dependent consumers have continued to access the meal, and there are no reports of reduced consumer demand thus far as a result of the price levels.

There are relatively large maize stocks in country, with the Food Reserve Agency (FRA) holding about 200,000MT, of which 98,000MT were purchases from the current season while the rest were carryover stocks from the previous marketing season. The private sector also has appreciable amounts of maize stock on hand, having purchased much more maize from the market than the FRA did.

Maize prices remained relatively stable up to the end of the year, similar to past surplus years. This is supported by the fact that there are good stocks of maize in country being held by farmers, traders, and millers. Furthermore, maize exports so far have been less than expected, partly due to the high price of Zambian maize on the export market, making it uncompetitive. This situation has guaranteed adequate staple food on the market.

Meanwhile, the livestock situation appears stable, with no major disease outbreaks. In December, testing of cattle for Contagious Bovine Pleuro Pneumonia (CBPP) was carried out in part of Southern province, particularly along the border with Western Province, as the disease is endemic to that province.

The rainy season started on a good note, with most areas experiencing either a timely or early start of season, in November. This allowed farmers in most areas to carry out timely planting. During the latter part of December, a dry spell affected most of the southern half of the country, but the early planted crops stayed in good condition and planting continued. Close monitoring of crop conditions as the season progresses will be required.

Most likely food security scenario (January June 2010)

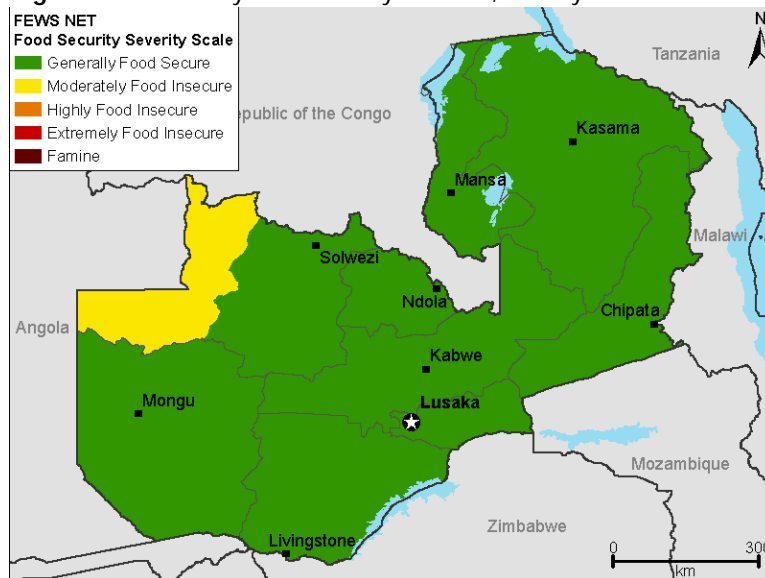
January tends to be the most difficult month every year; it is the peak of the hunger period because household stocks run low and the green harvest is being waited for. This season, the peak hunger period is expected to be less stressful. In low producing areas such as valleys, the hunger season appears to have been shortened to some extent as households own food stock is lasting slightly longer than usual.

Most areas will remain generally food secure up to the April harvest (end of 2010 marketing season). The poorer households are expected to benefit from increased labor opportunities as better off households have more stocks on hand to pay for labor. The poorer households will, as in other years, sell their labor and engage in other income generating activities such as the picking of wild foods to meet their food needs between January and April. Chronic food insecurity problems will exist, as it does in normal years, mostly in valley areas such as Gwembe, Sinazongwe (Southern Province), Luangwa, and low producing areas of western Zambia. Even in these areas, generally, own produced food has lasted longer than usual this marketing season due to a relatively good harvest last year. Households in these areas will depend on grain from neighboring districts to meet their staple food needs, as is the normal practice. Staple food stock in country will remain adequate, and the country is expected to carry some appreciable stocks into the next marketing season, which opens on May 1. The country still has relatively good stocks on hand and due to the uncompetitive price of Zambian maize, no more than 20,000MT of the 100,000 MT earmarked for exports is estimated to have been exported. By the end of March, early maize from commercial farmers (harvested in March and machine dried) will be on the market, increasing

supply even further. Last season, the early maize supply was estimated at 100,000MT. Maize and meal prices are expected to seasonably increase in February/March (the peak period) and thereafter fall as the main harvest enters the market.

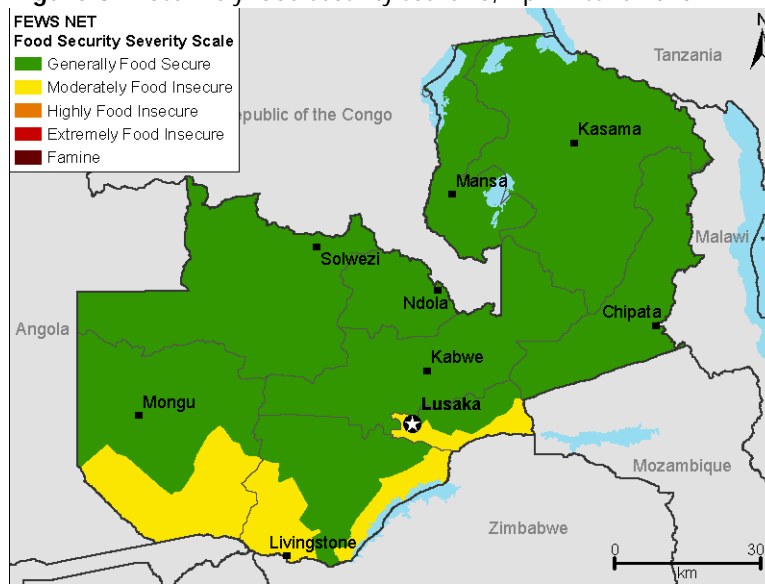
The Department of Meteorology has forecast a likelihood of normal to above normal rainfall. For the northern half of the country, rainfall has been good and is expected to continue for the remainder of the season. However, the southern parts of the country have had some dry periods in both December and January. In some areas, especially Southern province and parts of Western and Lusaka provinces, rains have in some cases been scanty with prolonged periods of dryness, accompanied by high temperatures. If dry conditions persist in late January to February (mid growing season), when most water is required, it could negatively affect crop yields there. The early and timely planted crops should remain in good condition, provided that rainfall distribution and intensity improves during the critical stages of growth, which include flowering and fruit formation. The extreme southern parts of the country areas are the most likely to be affected. In some valley areas such as Siavonga, Gwembe, and Sinazongwe, there have been reports of significant delayed planting, which could reduce the already normally low harvests. However, the effects on food security will be mostly felt in the 2010/11 marketing season through a reduced harvest, mainly after June. For southern Zambia, if the reduced rainfall persists, it will result in a reduced green harvest in February and March, when normally, seasonal foods such as squashes and green maize become available, reducing pressure on maize in rural areas. This will entail that households in low producing areas continue relying heavily on the market up to the next harvest. The market will remain well supplied throughout this period with meal from neighboring districts. If reduced rainfall persists, it could eventually result in reduced pasture and water points for livestock.

Figure 2. Most-likely food security scenario, January – March 2010



Source: FEWS NET Zambia

Figure 3. Most-likely food security scenario, April – June 2010



Source: FEWS NET Zambia

In the northern half of the country, crop conditions should remain good and the harvest is likely to be good. A green harvest by February will increase food availability for households while awaiting the main harvest in May.

The central parts of the country will by and large remain food secure throughout this period, having greatly benefited from the good harvest of 2008/09. The southern parts of this region could be impacted by the sporadic rainfall occurring in the south if rains do not improve. However, the impact will likely be moderate and a good harvest is probable.

All areas should remain generally food secure until the next harvest, with poorer households in low producing districts of the south experiencing short term food problems if the rains fail. This will be a result of a poor or unavailable green harvest, and they will therefore increase their dependence on the market at a time when staple food prices are at their peak (February/March). However, market supply will remain adequate during this period, even in these areas.

Table 1. Events which could affect the food security outlook

Geographic Focus Area	Possible events in the next 6 months that would change the most likely scenario in this area	Impacts on food security conditions	Likelihood of occurrence*	Key variables to monitor
Northern Region	Excessive rains resulting in serious flooding Abnormally high cereal prices due to market shortage	This would negatively affect food security and could create stress through loss of stored food, areas cut off from markets, and health risks (water contamination) It would entail partial submersion/loss of crops, reducing the May harvest substantially. Non-availability of early foods before the main harvest Reduced access to staple food during the hunger period, especially for poorer households as earnings from labor sales will be inadequate to purchase expensive cereal.	unlikely	Rainfall performance (distribution and intensity), and crop conditions Cereal and cassava prices
Central Region	Excessive rains resulting in serious flooding Abnormally high cereal prices on the market Reduced livestock prices Prolonged dry spell resulting in agricultural drought condition	This would negatively affect the food security conditions in this region and could create a food security stress through loss of stored food, areas being cut off from markets, health risk (water contamination) It would also entail partial submersion/loss of crops reducing harvest in May substantially. Non availability of early foods before main harvest Reduced access to staple food during the lean period especially for poorer households	unlikely	Cereal prices, rainfall performance, crop conditions
Southern Region, especially the extreme south	Prolonged dry spell resulting in drought conditions Low labor opportunities due to dryness as better-off households hold on to their stocks Drying of water points, poor pasture	This would substantially reduce both the green harvest and main harvest and therefore entail food access problems for many households in the valley area Fewer people able to work in exchange for food, and therefore food assistance would be needed as early as June. Entails moving livestock longer distances and risking disease outbreak, and poor livestock conditions	Unlikely Very unlikely	Crop conditions, labor demand, rainfall performance Livestock conditions

* Probability levels	Description
Unlikely	Could occur in the time period if conditions changed moderately
Very unlikely	Could occur in the time period if conditions changed significantly

