Government of the Republic of Malawi

The Malawi Vulnerability Assessment Committee(MVAC)

National Food Security Forecast, April 2013 to March 2014

MALAWI Vulnerability Assessment Committee

Bulletin No. 9/13 Volume 1

Background and Context

The Ministry of Agriculture and Food Security 2012/13 Third Round Agricultural Production Estimates Survey (APES) is indicating that the country will register some increases in production in most of the crops except for wheat, potatoes and cotton. Cotton production has decreased drastically (31%) because of the late delivery of inputs (seed and pesticides) and water logging conditions that affected some parts of country. Maize production has been projected at **3,639,866 MT**. This represents a slight increase of **0.44%** from last season's final round estimate of **3,623,924 MT**. Rice production is estimated at **125,156 MT** from **110, 405 MT** which represent **13%** increase over last season's final estimates. Groundnut production is estimated at **380,787 MT** from **368, 082 MT** from last season's final estimates representing a **3%** increase. Pulses production (beans, pigeon peas, cow peas, field peas, grams, soya beans and chick peas) has been estimated at **660,655 MT** from **581, 373 MT** for last season; representing a **14%** increase.

Ministry of Agriculture and Food Security further estimates that the total national food requirement for 2013/2014 consumption season will be **2,461,054 MT.** Owing to the FISP and other interventions by government and its partners, the country is expected to still produce a maize surplus of **194,340 MT** (total cereal surplus is pegged at **271,842 MT**) despite some areas experiencing floods and dry spells when the maize crop was at its critical stage.

Main findings of the assessment

While the country has registered satisfactory food production at national level during the 2012/13 growing season, there will

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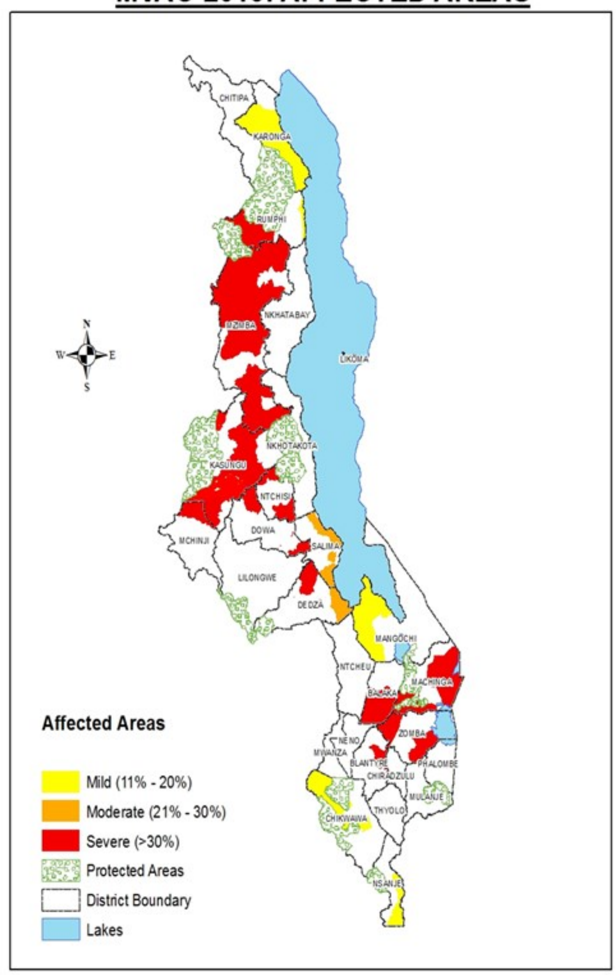
MVAC-2013: AFFECTED AREAS



Inside:

Excepts from the report.....

- The Ministry of Agriculture and Food Security, estimates that Malawi will produce **3,639,866 MT** of maize during the 2012/2013 growing season A surplus of **194,340 MT** will be available during the 2013 to 2014 consumption year.
- The MVAC annual assessment and analysis results indicate the 21 districts namely: Karonga, Mzimba and Rumphi in the Northern Region; Dedza, Dowa, Kasungu, Mchinji, Ntchisi, Nkhotakota and Salima in the Central Region and Balaka, Blantyre, Chikhwawa, Chiradzulu, Phalombe, Machinga, Mangochi, Mwanza, Neno,Nsanje and Zomba in the Southern Region will face food deficits ranging from 2 to 5 months
- MVAC projects that 1,461, 940 people in the 21 districts will be food insecure across the country requiring about 57,346 MT of maize equivalent.
- Maize prices have been generally high for first quarter of the consumption year; ranging from MK60 to MK150 per kilogramme.
- The food security situation will be monitored on a monthly basis, but a major update is scheduled for October, 2013.

be problems of food insecurity at household level in twent -one districts namely: Karonga, Mzimba and Rumphi in the Northern Region; Dedza, Dowa, Kasungu, Mchinji, Nkhotakota, Ntchisi and Salima in the Central Region and Balaka, Blantyre, Chikhwawa, Chiradzulu, Phalombe, Machinga, Mangochi, Mwanza, Neno, Nsanje and Zomba in the Southern Region. Production in these districts has been affected by a mixture of late on set of rains, early cessation of rains, erratic rains, prolonged dry spells and flooding. As regard severity of the problem, the Northern Region has been affected the most followed by the Central Region and then Southern Region. The total number of people who will not be able to meet their annual food requirement during the 2013/14 consumption period is **1,461,940** representing 9.5% of national total population The affected districts have annual food deficits ranging from 2 to 5 months. The total humanitarian food required to support the vulnerable population is estimated at **57,346 Metric Tonnes** maize equivalent with a cash equivalent of **MK7.2 billion** if sourced locally.

Findings of this assessment are based on the assumptions below. Any significant changes to these assumptions will be factored in the update analysis to be conducted in October/November 2013.

⇒ All things being as assumed, MVAC projects that maize prices will average MK125/kg during the consumption period (April to June 2013, picking up to a maximum of MK200/kg during the peak lean period (December 2013 to January 2014).

⇒ Markets will function normally and we expect that traders will move maize from surplus to deficit areas at reasonable transportation costs.

⇒ Winter maize production will be promoted in areas that have residual moisture.

⇒ Humanitarian response will be planned early to allow interventions to be implemented on time without aggravating the poor food situation in affected areas.

⇒ Labour (ganyu) opportunities would remain within the seasonal expected trends.

⇒ That the general price trend of different commodities will not increase significantly.

⇒ That Government would continue monitoring and regulating the flow of staple foods being exported.

Table 1. Projection of Affected Population during the 2013/2014 Consumption Year.

	District	Affected Population	Maize Equivalent (MT)	Equivalent (MK'000)
1	Balaka	69,645	3,166	395,750
2	Blantyre Rural	37,111	1,687	210,875
3	Chikhwawa	82,547	2,251	281,410
4	Chiradzulu	49,352	2,243	280,375
5	Dedza	56,262	2,557	319,625
6	Dowa	31,753	1,443	180,375
7	Karonga	56,005	1,018	127,250
8	Kasungu	112,251	5,102	637,750
9	Machinga	110,834	5,038	629,750
10	Mangochi	96,648	1,757	219,625
11	Mchinji	14,979	681	85,125
12	Mwanza	71,358	3,244	405,500
13	Mzimba	191,652	8,711	1,088,932
14	Neno	77,218	3,510	438,750
15	Nsanje	67,367	1,837	229,660
16	Nkhotakota	38,676	1,055	131,850
17	Ntchisi	23,360	1,062	132,750
18	Phalombe	71,020	3,228	403,500
19	Rumphi	29,415	1,337	167,125
20	Salima	83,223	2,270	283,750
21	Zomba	91,264	4,148	518,500
	TOTALS	1,461,940	57,346	7,168,227

Crop Production Trends (During Last 7 Consumption Years)

Table 2: Production and Consumption Trends: 2008 – 2014

Consumption Year	Maize Production (million MT)	Maize Surplus (million MT)	Vulnerable Population	Maize Equivalent (MT)	Cash Equivalent (MK000')
2007/08	3.2	1.2	63,234	610	81,000
2008/09	2.9	0.5	613,291	16,806	942,000
2009/10	3.6	1.2	275,168	10,984	573,000
2010/11	3.2	.53	508,089	28,602	1,138,000
2011/12	3.9	1.2	272,500	6,756	405,000
2012/13	3.6	.50	1,972,993	84,811	6,784,900
2013/14	3.6	.19	1,154,316	44,066	5,508,300

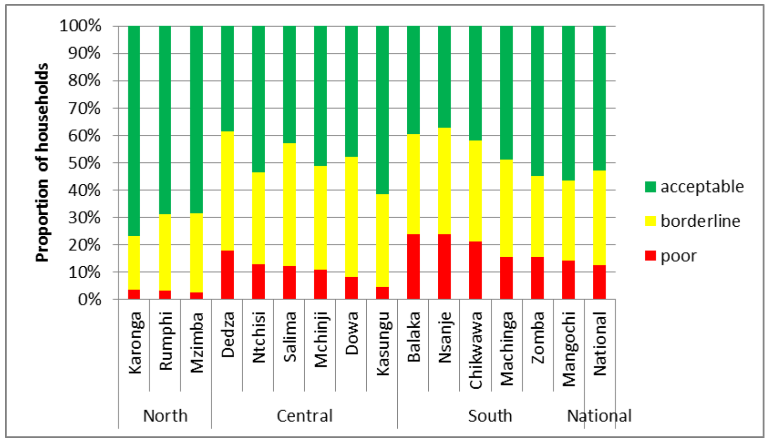
Malawi has produced maize surpluses at national level for the past seven consecutive years. These surpluses can be largely attributed to the FISP programme and other programmes being implemented through other players in the food security sector. The number of people vulnerable to food insecurity have remained over the one million mark and this trend is likely to continue or worsen as people's livelihoods continue to deteriorate due to depleted asset base over the years.

Household food security outlook

At the time of assessment, food commodities were available in the markets and households were accessing the commodities in the markets. The assessment further revealed that, food crop supplies in the market have generally been steady, however, prices have been rising thus affecting the purchasing power of most households particularly the resource constrained households.

An examination of household food consumption patterns revealed that a significant proportion of households (13%) in the targeted population were having poor consumption during the time of assessment, a situation least expected during post-harvest season. Furthermore, a large proportion of households (66%) were engaging in some form of coping strategy to access food. Expenditure on food was more than 75% for 42% of the households. The main livelihood sources were agro-based engaging 50% of the households.

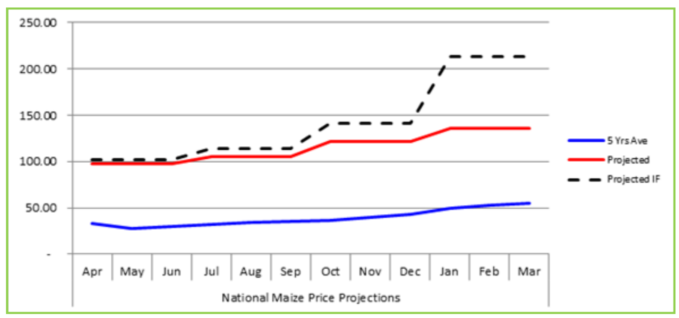
Graph 1: Household Food Consumption Score



This means that people will be vulnerable due to the rise in prices of food commodities during the consumption period and MVAC needs to closely monitor price trends as this will have an effect on the number of people that will not be able to access their annual food entitlements.

The average household monthly expenditure was estimated at MK 7,685. The highest average monthly expenditure was recorded in the North, particularly Karonga district (MK12, 999) while Machinga in the South recorded the lowest (MK4,876).

Graph 2: National Maize Average Price Trends



Markets and marketing

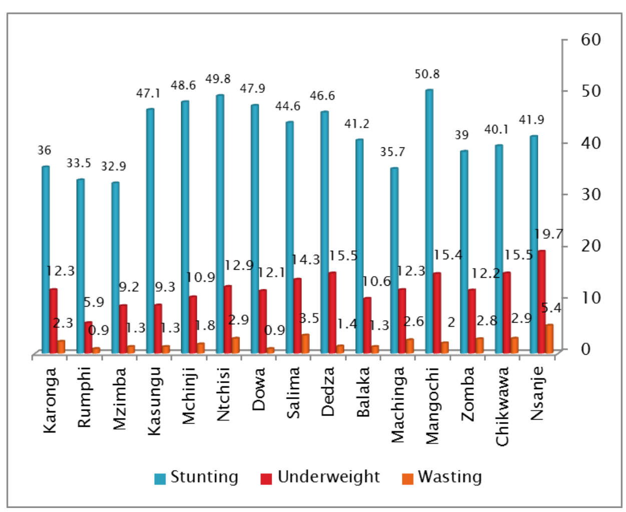
MVAC projects that maize prices will average MK125/kg during the year 2013/2014. However, official national average prices of maize (from Agro-economic Survey) between April 2012 and March 2013 show that maize increased by 200% from MK 42.41/kg to MK 135.14/kg. The main drivers for the steep price increases were: seasonal trends, maize scarcity, pressure from informal cross border trade and macroeconomic factors.

If the official price projections are subjected to market irregular factors similar to what happened during the 2012/13 consumption season, the projections would rise to a peak of MK 213.58 in quarter four as shown in Graph 2. above. MVAC will closely monitor the trends as the year progresses.

Nutrition Status at the start of the Consumption Year

MVAC conducted a nutritional survey on under five children to help understand the current household nutritional status in the 15 districts of Karonga, Mzimba and Rumphi in the Northern Region; Dedza, Dowa, Kasungu, Mchinji, Ntchisi and Salima in the Central Region; Balaka, Blantyre, Chikhwawa, Machinga, Mangochi, Nsanje and Zomba in the Southern Region. Measurement was done on 0 —59 months aged children because children quickly respond to nutritional changes.

The findings of the survey show that currently the household nutritional status is normal and that the findings are comparable to figures reported by other national surveys. The situation may however get worse as the consumption year progresses and the is need for a follow up survey during the lean months of the year.



Conclusions

- Despite national food self sufficiency, a total of 1, 461, 940 people in 21 districts will not be able to meet their food requirements during the April, 2013 to March 2014. These people will require 57,346 MT of maize equivalent with a cash value of 7.2 billion Malawi Kwacha if sourced locally.
- Maize prices are sharply higher over last year during the first quarter of the consumption period signifying that people may fail to access food during the critical hunger season.
- Maize production has been projected at **3,639,866 MT**. This represents a slight increase of **0.44%** from last season's final round estimate of **3,623,924 MT**. A surplus of **194,340 MT** (total cereal surplus is pegged at **271,842 MT**) is projected.
- Cumulative rainfall shows that northern and central Malawi have received less rainfall this season compared to same period last season save for some areas along the lakeshore while south has generally received more rains this season compared to the same period last season.
- A significant proportion of households (13%) in the targeted population were having poor consumption during the time of assessment, a situation least expected during post-harvest season.
- A large proportion of households (66%) were engaging in some form of coping strategy to access food. Expenditure on food was more than 75% for 42% of the households.

Recommendations

The MVAC recommends the following:

⇒ Government and its collaborating partners should move swiftly to plan response for the needs of the affected population to avoid worsening of the current situation.

⇒ Government and its partners should explore a range of interventions varying from cash-based to food-based intervention in addressing the situation. Interventions that build people's resilience should be given priority.

⇒ A need to conduct a follow up nutrition survey in the affected areas later in the year.

⇒ ADMARC and private traders should stock enough maize in the affected areas to stabilize supplies and cushion against abnormal price fluctuations.

⇒ Government and partners should continue in intensifying use of drought tolerant crops to increase resilience to effects of climate change.

⇒ Government should intensify promotion of irrigation to reduce heavy reliance on rain-fed agriculture.

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The Malawi Vulnerability Assessment Committee comprises Government, inter-government, academic and non-profit member organizations that seek to provide information to inform public action. Participating MVAC members and funding institutions include:

World Food Programme

SADC FANR Vulnerability Assessment Committee

University of Malawi

Ministry of Economic Planning & Development.
Ministry of Agriculture and Food Security
Ministry of Local Government and Rural Development
Department Disaster Management Affairs
National Statistics Office
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