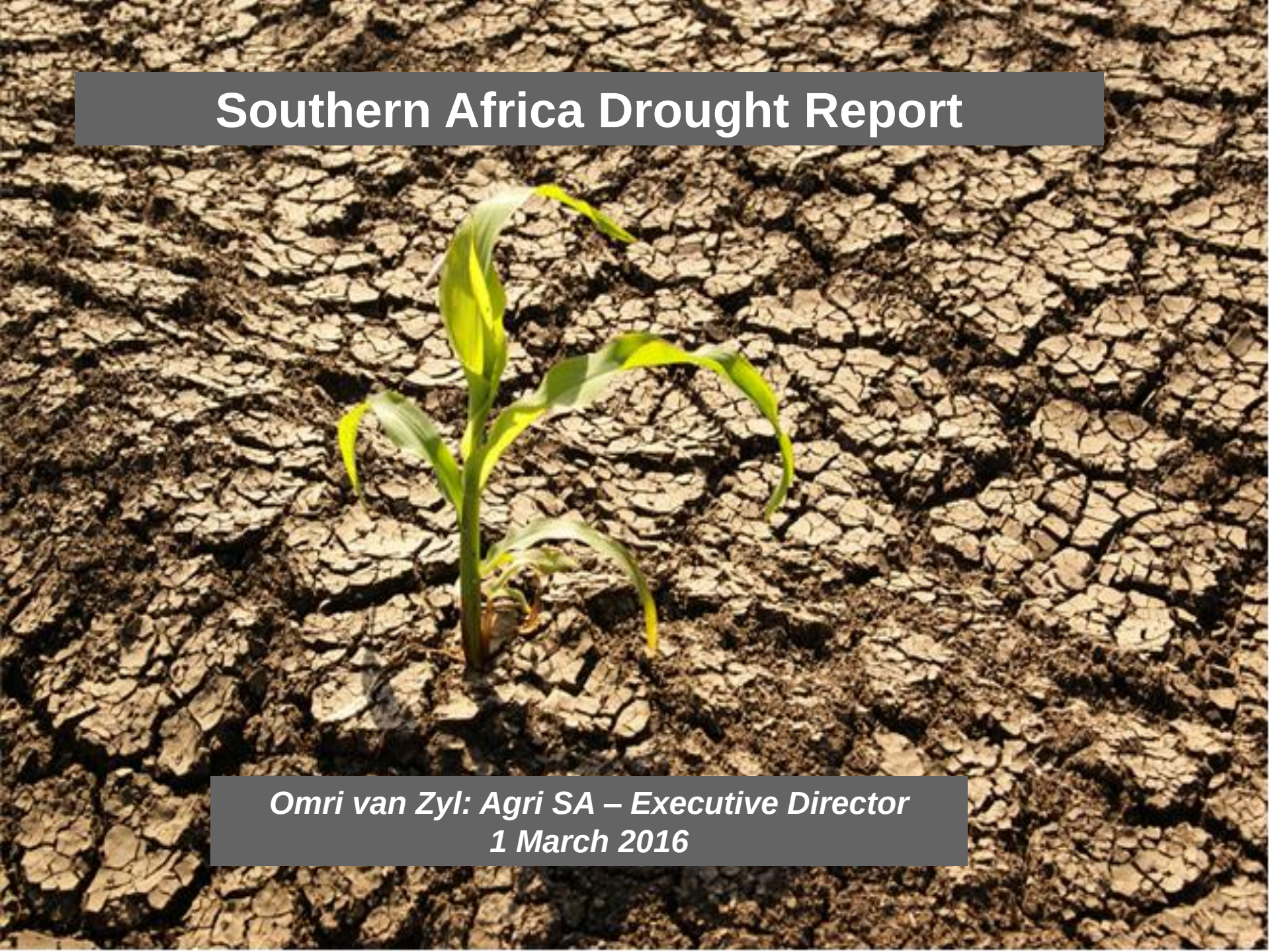
Southern Africa Drought Report



Omri van Zyl: Agri SA – Executive Director
1 March 2016

Introduction

Southern African Development Community (SADC) – 15 member states

Established in 1992 and committed to regional integration and poverty eradication within Southern Africa through economic development and ensuring peace and security.

- Angola
- Botswana
- Democratic Republic of the Congo – since 8 September 1997
- Lesotho
- Madagascar – membership reinstated on 30 January 2014 [1] after an imposed suspension in 2009
- Malawi
- Mauritius – since 28 August 1995
- Mozambique
- Namibia – since 21 March 1990 (since independence)
- Seychelles – also previously a member of SADC from 8 September 1997 until 1 July 2004 then joined again in 2008.
- South Africa – since 30 August 1994
- Swaziland
- Tanzania
- Zambia
- Zimbabwe

Introduction

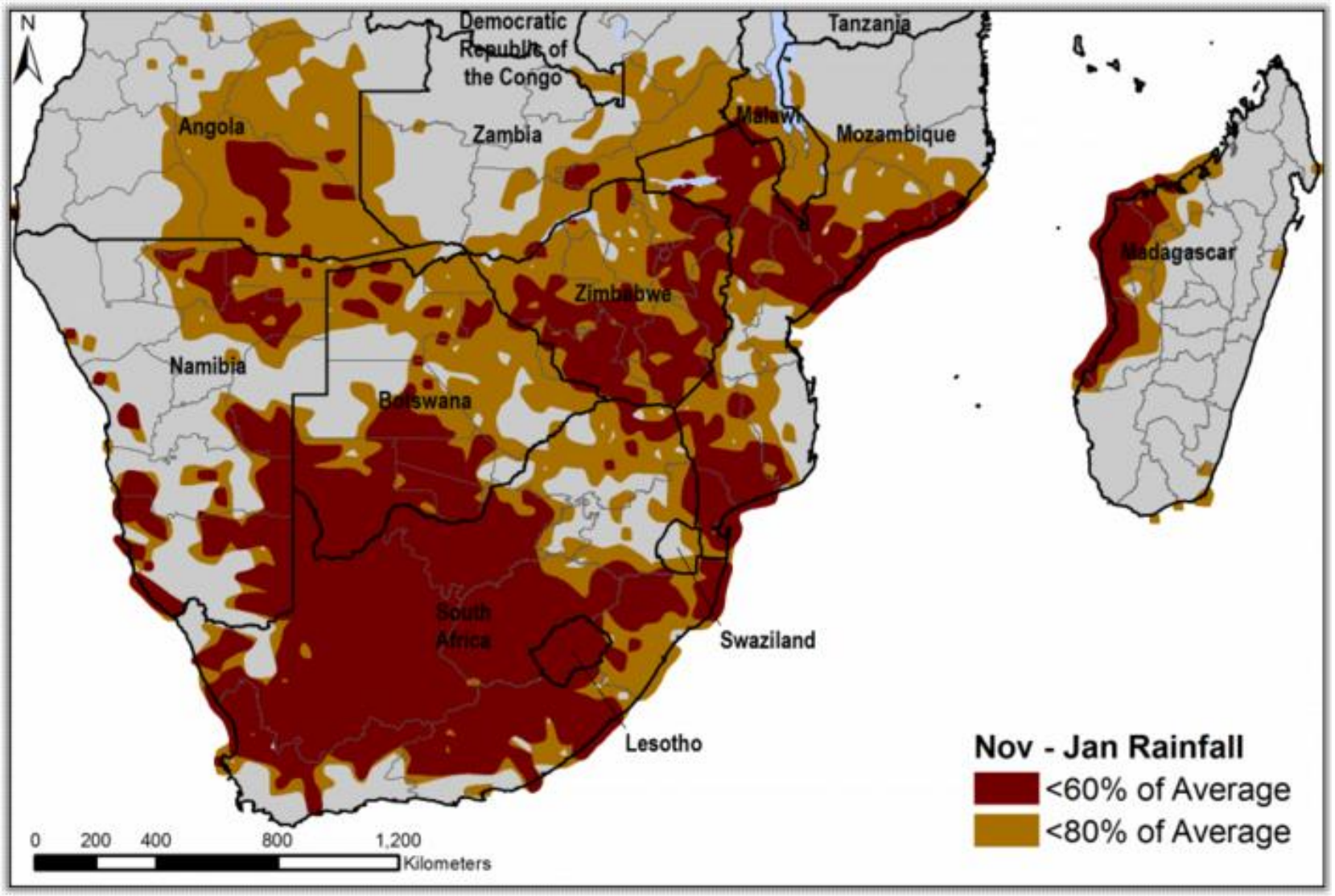
Southern Africa is currently in the grip of an intense drought, driven by one of the strongest El Niño events of the last 50 years. The ongoing El Niño has resulted in a severe drought across Southern Africa. Rains, which typically begin in October/November, have been 10 to more than 50 days late and significantly below average.

This poor rainfall, in combination with above-average temperatures, has limited crop development, pasture regrowth, and water availability. If rainfall remains below average, as forecasts suggest, the current growing season is likely to be one of the driest on record.

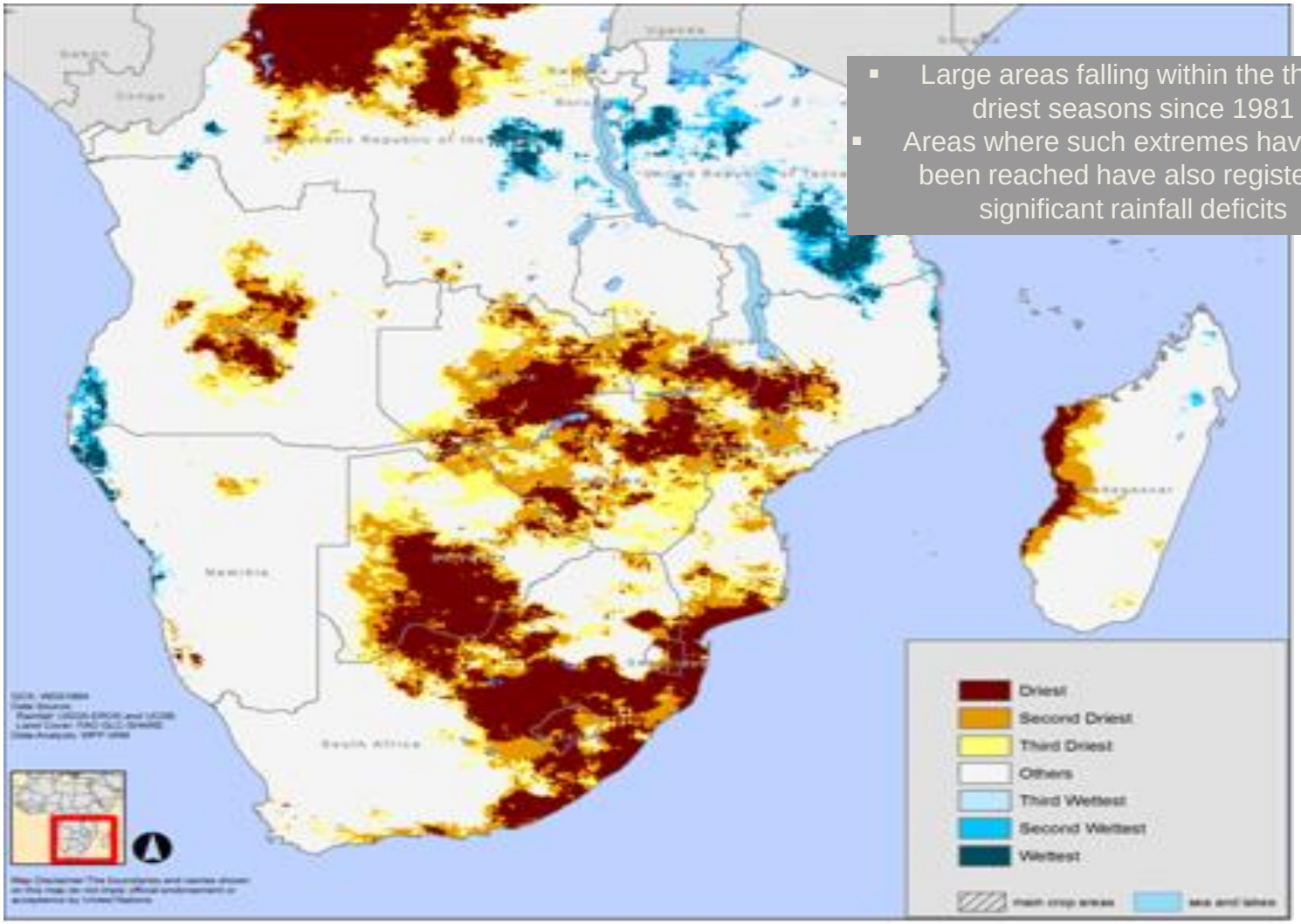
Already, regional food supplies are limited, staple food prices are higher than average, and acute food insecurity is more prevalent than usual due to poor crop harvests in early 2015. An estimated 2.5 million people are classified as in Crisis (IPC Phase 3) for the January to March 2016 lean season in Malawi, Zimbabwe, Mozambique, Madagascar, and Lesotho.

If the abnormally hot and dry conditions persist, a regional food security crisis, including a substantial increase in the size of the acutely food insecure population, is considered likely in the latter half of 2016 and early 2017.

Areas affected by drought in Southern Africa

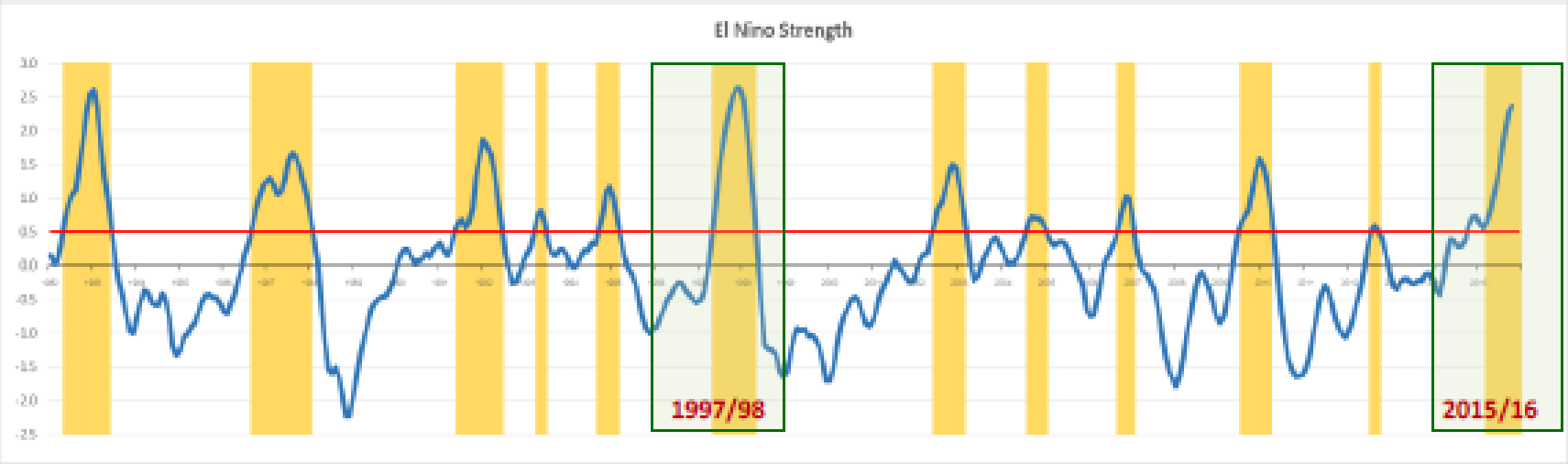


Rainfall Oct-Nov-Dec-Jan 2015/2016 ranked within last 35-years



El Nino signal strength in 2015/16 compared to 1997/98

- El Nino peaked in late November, early December but remains strong and will only decline to neutral around June. High temperatures are also forecast to continue, further exacerbating the impacts of reduced rainfall. A continuation of hot, dry conditions is likely to reduce yields in both chronically food deficit areas and key surplus-producing parts of the region, including northern South Africa, northern Zimbabwe and possibly southern Zambia. South Africa – severe drought with crop growing areas having their driest early season since 1981. Consequence: Maize production is projected to be down by 35% compared to average. Imports will be required to meet needs both nationally and in neighbouring countries



Source: NASA/Graphic by WFP-VAM HQ

Situation

Climatic conditions and seasonal outlook

- In maize surplus-producing Free State and North West provinces of South Africa, the start of seasonal rains was more than 50 days past the average onset.

- Parts of southern Mozambique and northern Namibia experienced a delay in the start of season of up to 40 days.

- Rains also arrived 10-30 days late in parts of central and southern Malawi.

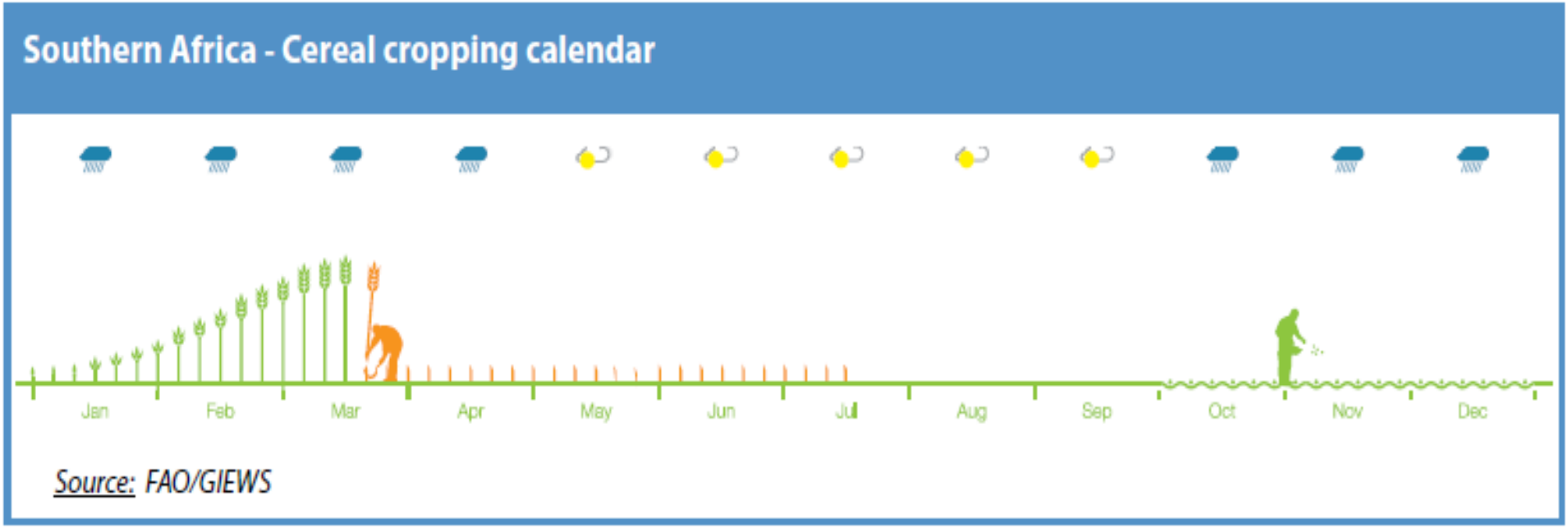
- In many areas where rains began on time, subsequent periods of prolonged dryness led to failed starts.

- As a result of the delayed start of season, October to December 2015 was the driest on record for parts of central South Africa, Botswana, Zimbabwe, central Mozambique, and central Zambia.

- Temperatures have also been above-average and an analysis of satellite-derived imagery indicates that vegetation conditions across large parts of the region are at their lowest levels in the past 15 years.

Southern Africa crop calendar

Most southern African countries experienced a 30-60 day late start to the season - resulted in a significant decrease in planted area across countries



Climatic conditions and seasonal outlook (continues)

- Drought emergencies have been declared in several provinces in South Africa and Lesotho.
- Water authorities in Botswana, Swaziland, South Africa, and Namibia are advising residents to limit water usage because of low dam levels.
- Low water levels at the Kariba dam are affecting power generation for Zimbabwe and Zambia, and the subsequent disruptions to electrical power have affected industry in Zambia, and therefore household incomes.
- The poor start of season has also exacerbated lean season food insecurity, in part through a reduction in agricultural labour opportunities.
- Food insecurity was already atypically high due to poor crop production and flooding in 2015. An estimated 2.5 million people are currently in Crisis (IPC Phase 3) and in need of urgent humanitarian response in Malawi (~900,000), Zimbabwe (~600,000), Mozambique (~600,000), Madagascar (~400,000), and Lesotho (~40,000).

Climatic conditions and seasonal outlook (continues)

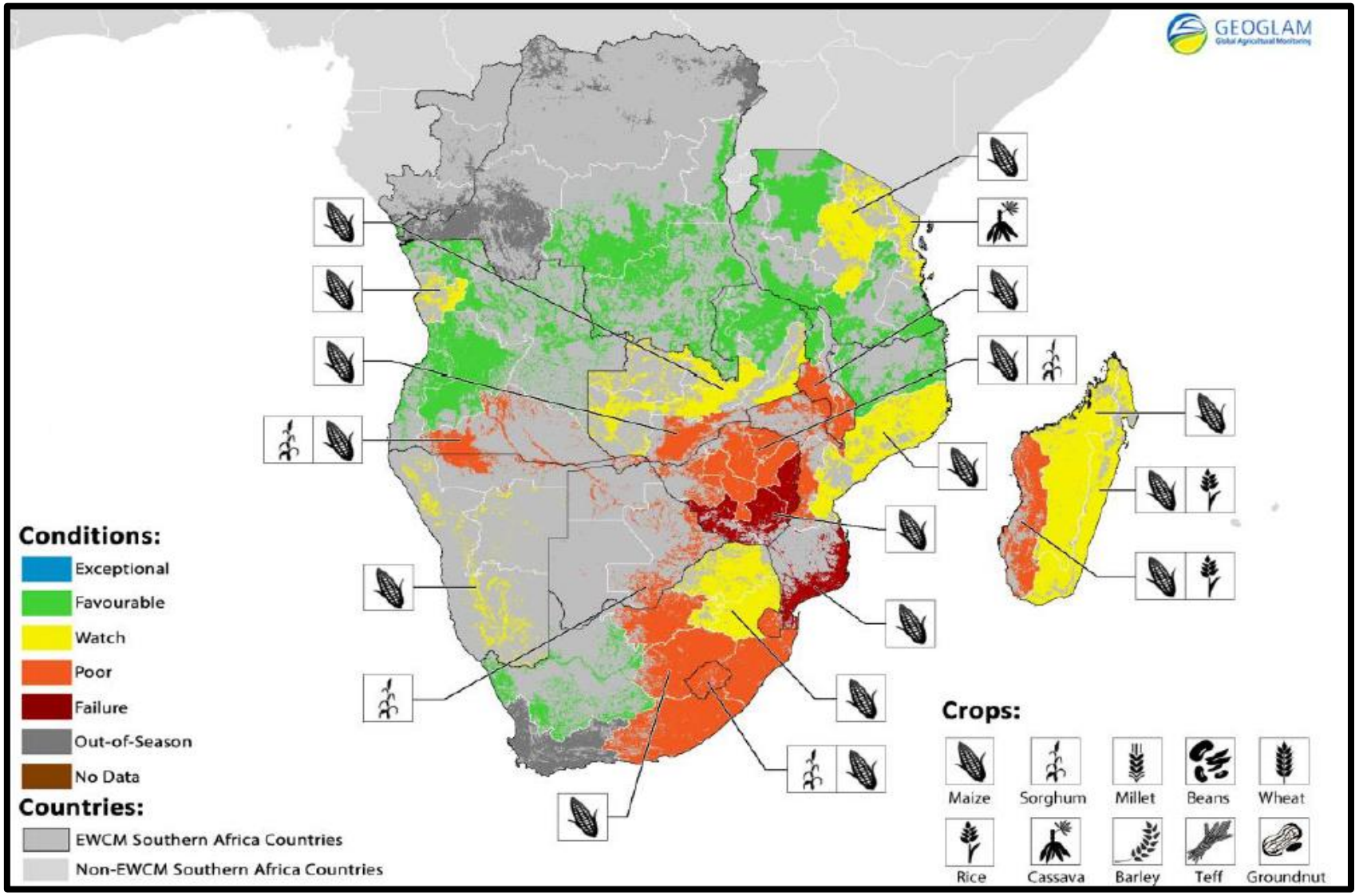
- Current food insecurity is already worse than usual in Southern Africa and will likely deteriorate further over the coming two to three months. While April/May harvests will improve food access in the short term, food security is likely to begin deteriorating by July, reaching its peak between December 2016 and March 2017.

- In addition to reduced staple and cash crop production at the household level, the major driver of acute food insecurity over the coming year is likely to be further increases in staple food prices.

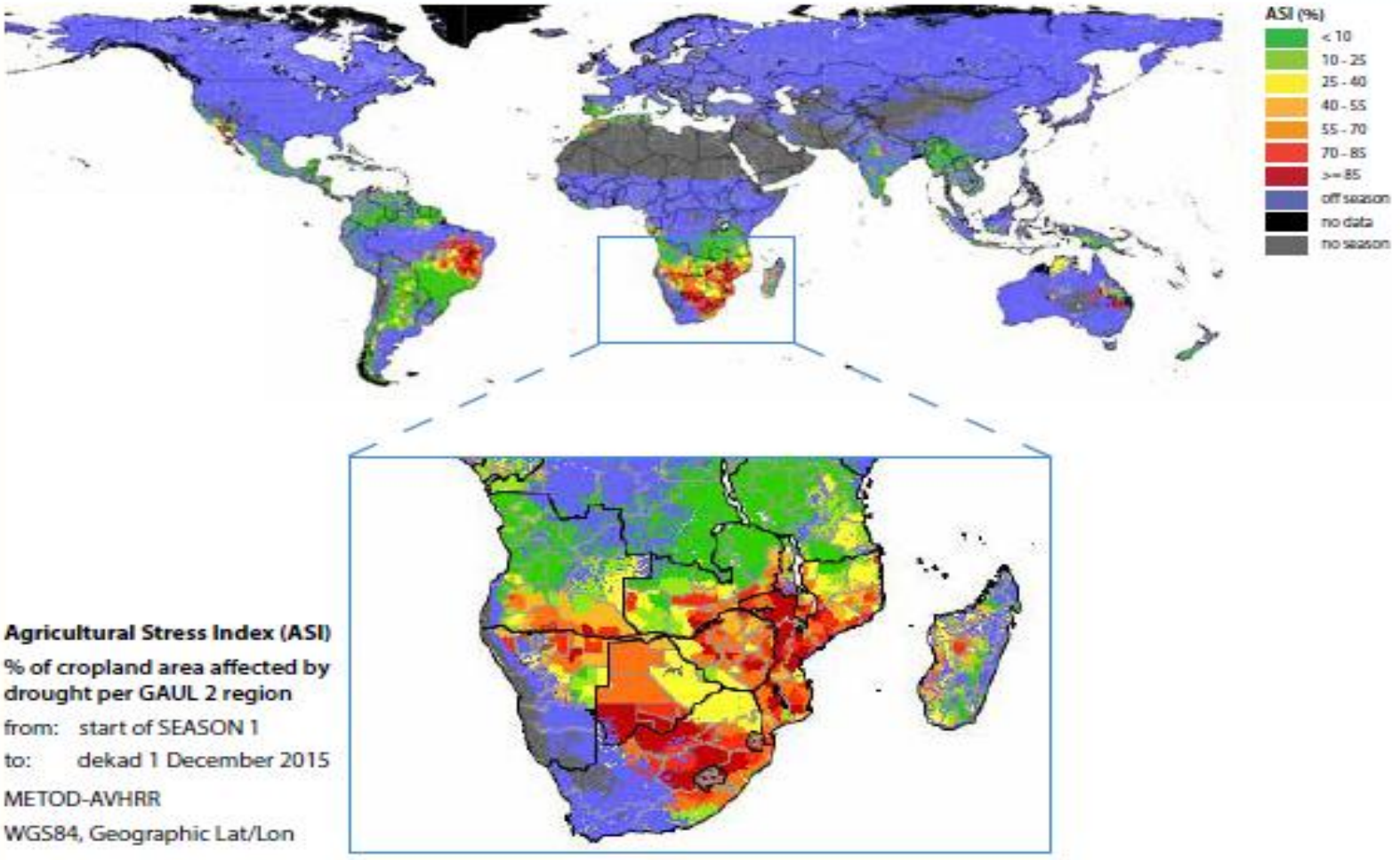
- Food prices are already above average in many areas, and regional maize supplies are below-average. Therefore, even with increased imports to the region, significantly reduced production in 2016 would put additional upward pressure on retail grain prices.

- The current drought is also expected to delay 2016 harvests, extending the current lean season. While it is too early to provide detailed estimates of the population likely to be food insecure in 2016/17, FEWS NET expects that this population will be at least two times higher than current levels.

Southern Africa Crop Conditions



Southern Africa agricultural stress index (December 2015)



Note: The Agricultural Stress Index (ASI) refers to the percentage of cropped areas suffering from water stress, by administrative region.

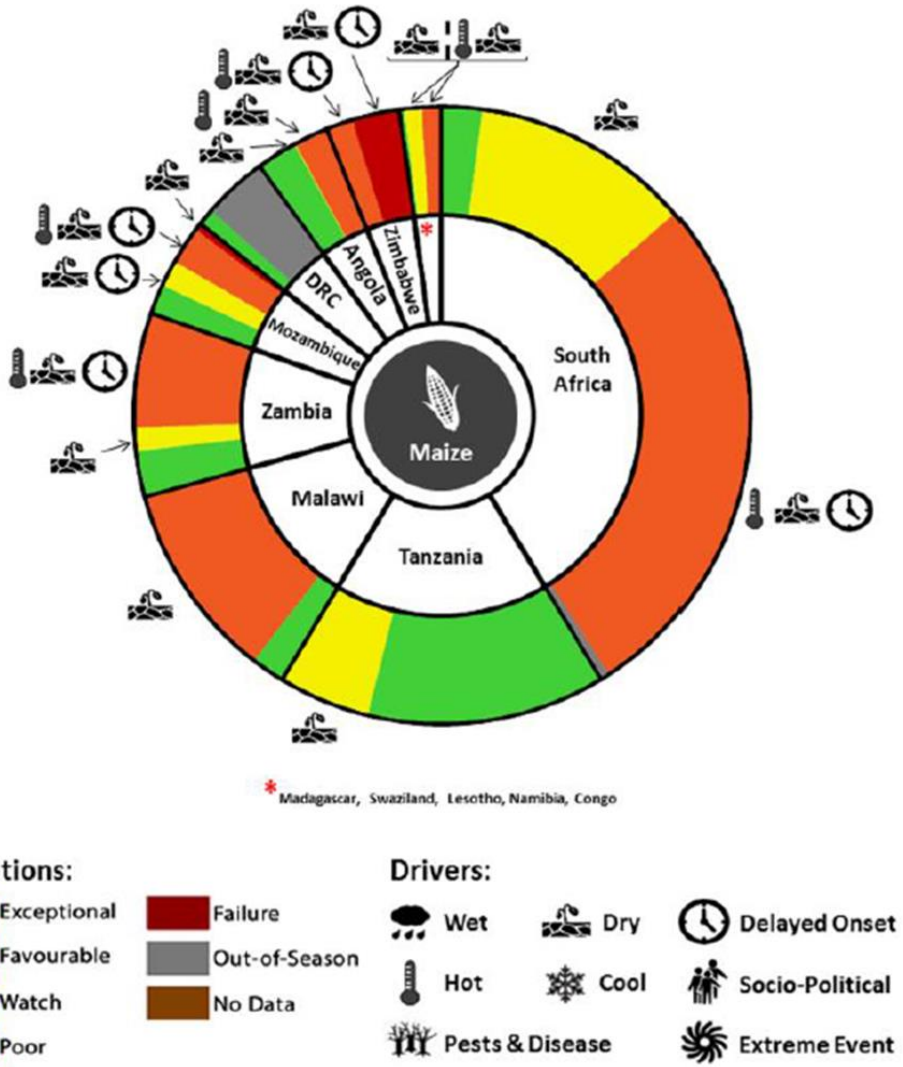
Source: *FAO/GIEWS*

Southern Africa cereal production and utilisation

[1] Based on national and subregional maize production trends since 1982.

[2] El Niño events are classified into four categories to define their intensity: Weak, Moderate, Strong and Very Strong. However, there is not a deterministic trend between the intensity and the impact on agricultural production.

Status quo



- South Africa produces 61% of the food supply in the region
- In the red zone – South Africa, Malawi, Zambia, Zimbabwe (declared a national disaster), parts of Mozambique, Botswana and Namibia
- Regional food insecurity is a reality
- Further regional mobility already happening

Staple cereal prices

Stapel cereal prices have been increasing in a number of southern African countries mainly due to limited supply – the region as a whole is well above the 5-year average price.

% above 5-year average

Zambia
3%

Zimbabwe
19%

Malawi
4.8%

South Africa
34.9%

Lesotho
15.9%

Mozambique
41.9%

Tanzania
19%

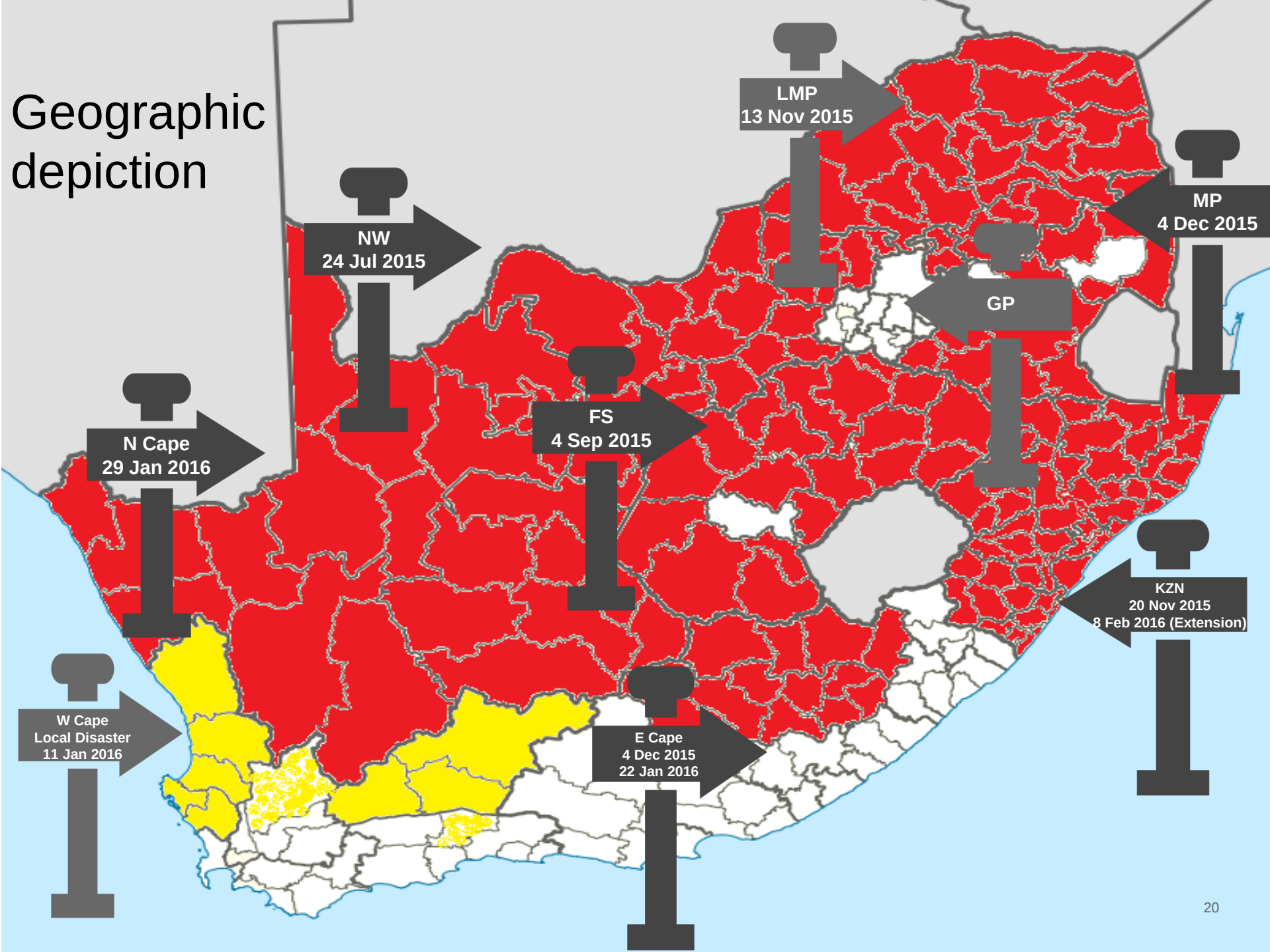
Madagascar
27 - 40%

Key messages

- Across large swathes of Zimbabwe, Malawi, Zambia, South Africa, Mozambique, Botswana, and Madagascar, the current rainfall season has so far been the driest in the last 35 years.
- Seasonal forecasts from a variety of sources are unanimous in predicting a continuation of below-average rainfall and above-average temperatures across most of the region for the remainder of the growing season.
- With poor and erratic rainfall as a result of the El Niño, the region is likely to experience significant reductions in crop production in 2016, a situation that will worsen food security during the 2016/2017 consumption period.
- Most countries in the region are likely to experience an extended lean season by at least a month due to the effects of late planting experienced across the region.
- The start of the green harvest, which normally provides alternative sources of food to most poor households, is expected to start around mid-March compared to the usual February. The main harvest will also likely start in April.
- Millions of people will require humanitarian assistance in 2016/2017 and imports from outside the region will be needed to meet these needs. It should be noted that this follows a poor season in 2014/2015 in large parts of the region.

South Africa

Geographic depiction



Snapshot of commodity status

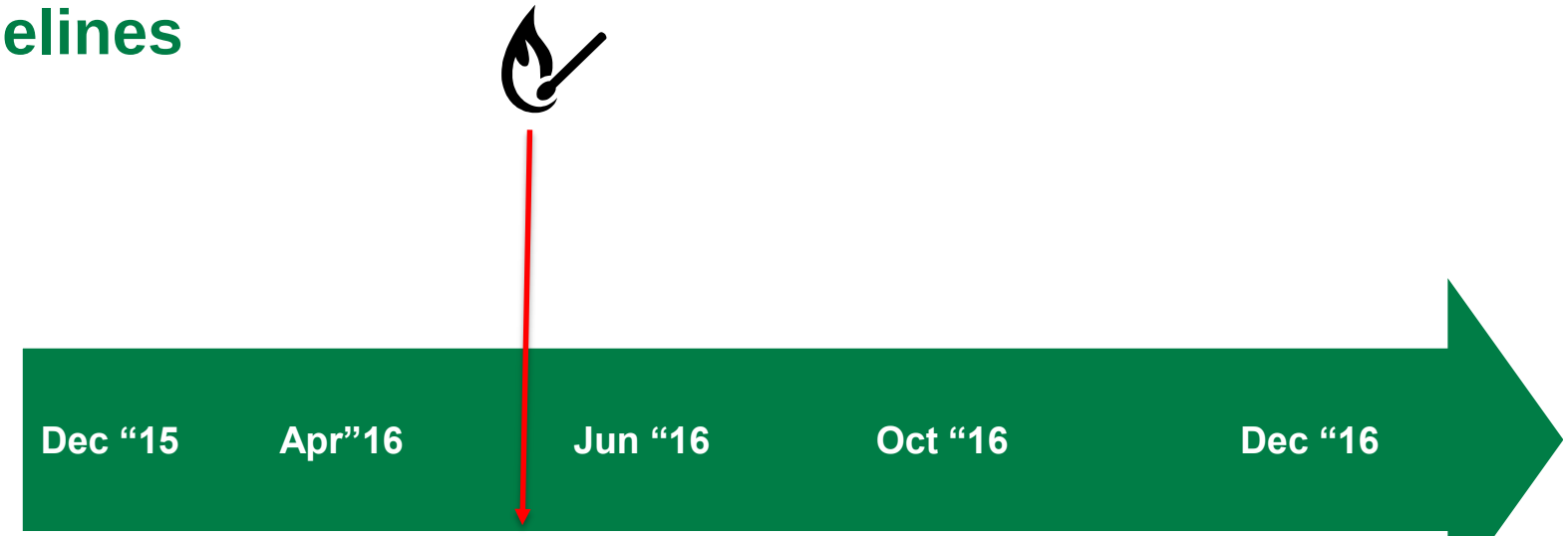
Commodity	Severe	Moderate	Minimal effect
Maize			
Wheat			
Oil seeds			
- Sunflower			
- Soybeans			
- Groundnuts			
Beef & Sheep			
Poultry			
Pork			
Game			
Ostrich			
Wool and mohair			
Cotton			
Dairy			
Fruit			
Citrus			
Table grapes			
Wine			
Vegetables			
Potato			
Sugar			
Forestry			
Tobacco			

Rain needed otherwise movement will go to red

Certain areas – Limpopo rain needed to avert long term damage

The major commodities are under severe strain

Timelines



Planting season – late, crop estimates 7,5 million tonnes

Maize imports

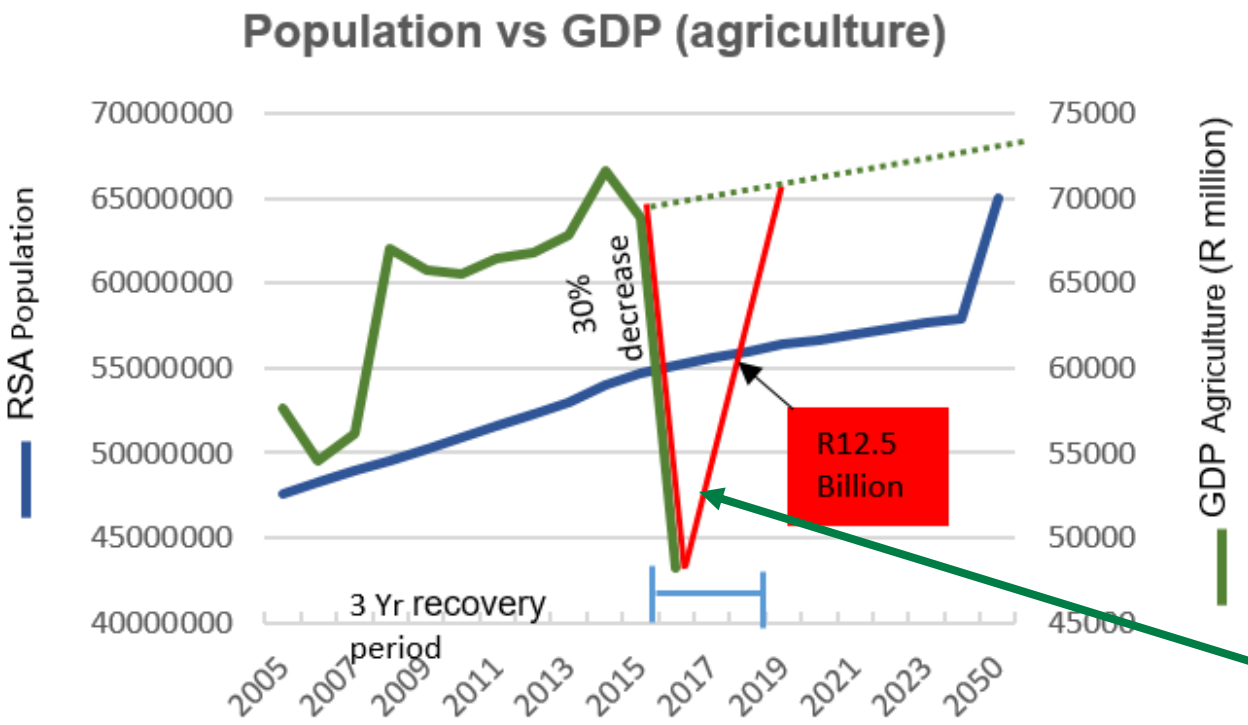
Livestock crises

Livestock crises

Other commodities

Citrus, oilseeds, wool and mohair, etc.

We need to recover agricultural production

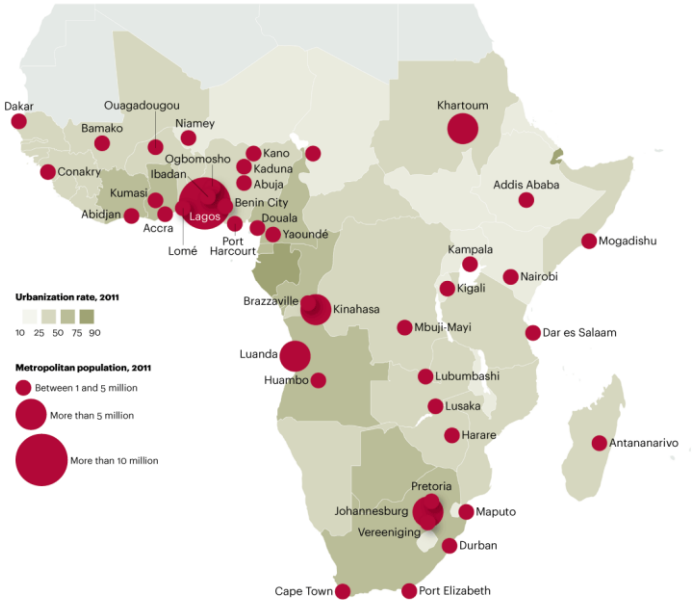


This is a 4 year recovery period

Major risk: if we do not recover agricultural production there will be food insecurity and hyper inflation and large scale job losses in the sector

Consequences of drought

Figure 2
Sub-Saharan Africa's most populous cities



Note: United Nations, *World Urbanization Prospects*, the 2011 Revision

Basic facts about the impact of the drought on Southern Africa

From Oct 2015 – Sep 2016, FEWS NET projects that emergency food assistance in the relevant countries will be roughly 30% higher than estimated the for last year. El Nino impacts on climates are a primary driver of acute food insecurity

Nearly 29 million people are currently food insecure in the southern Africa region mainly due to carry-over effects of past poor harvest season

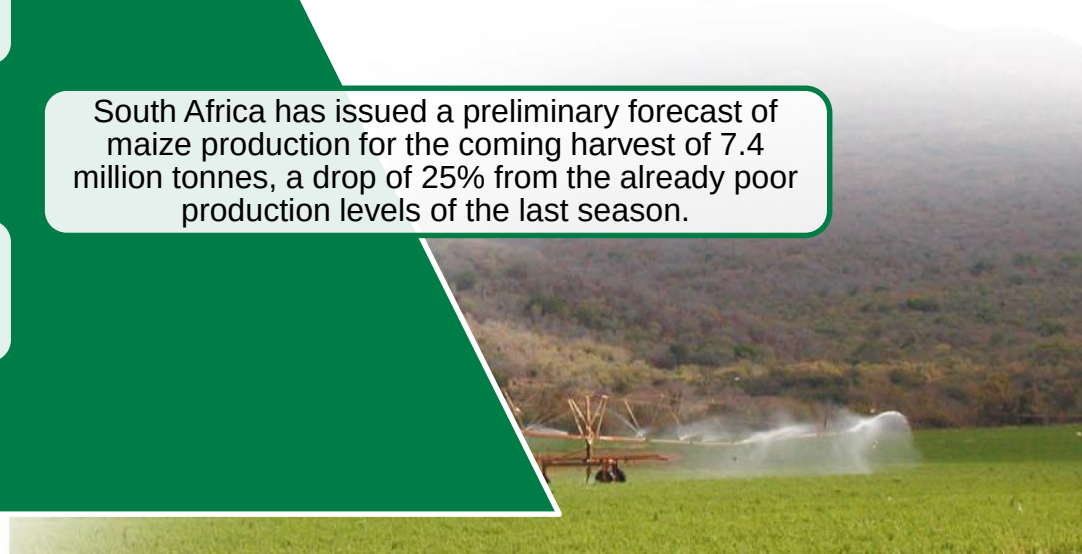
Maize prices are increasing unusually by 15 – 40% in response to the increasing scarcity in the region

Over the coming year, humanitarian partners should prepare themselves for food insecurity levels and food insecure population numbers in southern Africa to be at their highest levels since the 2002-2003 food crisis.

Millions of people will require humanitarian assistance in 2016/2017, notably in Zimbabwe, Malawi, Mozambique, Lesotho and Madagascar.

South Africa has issued a preliminary forecast of maize production for the coming harvest of 7.4 million tonnes, a drop of 25% from the already poor production levels of the last season.

Regional cereal stocks in some surplus countries is limited. Zambia, which was the highest export country in the region last year, is left with exportable stocks of approximately 200 000 tonnes



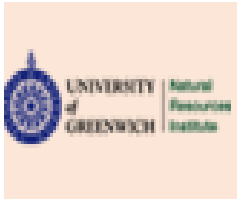
Recommendations

Recommendations

1. Enhance resilience building programs and actions geared towards increasing preparedness and early response	2. Maximize use of existing and new irrigation assets (dams. boreholes, rivers) and water harvesting	3. Encouraging timely planting of small grains and other short appropriate crops including season/early maturing crops using conservation agriculture and other climate smart techniques
4. Strengthening of health and nutrition education programs of the nutrition response, including coordination	5. Strengthen child nutrition situation analysis and continued monitoring of food and nutrition security indicators	6. Monitoring of medium and shorter range weather forecasts that would alter El Nino forecast
7. Continuous monitoring rainfall during planting and growing season of the crops by Early Warning Units	8. Preposition nutrition commodities in vulnerable areas and support capacity strengthening to support the management of malnutrition in each country	9. Market monitoring of key variable, including prices of staples and agricultural inputs, direction of trade, marketing conditions, change of policies or regulations
10. Provide early warning information on the likelihood of crop and livestock disease outbreak as well as diminished pasture	11. Institute stringent measures to prevent livestock disease outbreaks such as early vaccination and quarantine to restrict mobility of livestock	12. Governments to utilize tools and instruments like Africa Risk Capacity (ARC) weather index based insurance products that could support early action and drought mitigation

The process

Involve roleplayers/partners/ngo's:



Sokoine University of Agriculture

Agribusiness Systems International

Approach international financial institutions

Multilateral development bank (MDB)

Main MDB's:

- World Bank
- International Fund for Agricultural Development (IFAD)
- European Investment Bank
- African Development Bank

Sub-regional:

- Economic cooperation Organisation Trade and Development
- New Development Bank

Multilateral financial institutions:

- European Commission
- OPEC Fund
- International Investment Bank

Bretton Woods Institutions

- International Monetary Fund (IMF)
- International Finance Corporation (IFC)
- International Development Association (IDA)
- GATT
- Multilateral Investment Guarantee Agency

Bilateral Development Banks/Agencies

- Netherlands Development Finance Corporation
- German Investment Corporation
- French development Agency

National Development bank

- Development Bank of Southern Africa
- National Development Bank of Ghana, Botswana Rwanda, Uganda and Mozambique

Regional Development Banks

- African development Bank
- European Bank for Reconstruction and Development
- Council of Europe Development Bank
- Interamerican Development Bank

Other regional financial institutions

- International Investment Bank
- Bank of International Settlements
- African Association of Central Banks
- European Central Bank

Actions required

- Farmers will provide the solution – with companies in agriculture
- Core skills vs donor skills
- Funding requirement – pool funding and implement systems that work
- Forward planning for Southern Africa as a region
- Scale impact and M&E

Thank you …