Highlights

- According to a recent qualitative survey done by IAPRI, the Northern and Eastern Regions of the country remain food secure for the most part, owing to the good performance of the production and marketing seasons. Rural farm households have enjoyed increased income levels from the sale of various crops such as; maize grain, soya beans, sunflower, cotton, and groundnuts. Most of these crops have fetched higher prices during this 2019/2020 agricultural marketing season than average. The improved income levels have enhanced the purchasing power of most rural households and contributed to rapid Farmer Input Support Programme (FISP) deposits in preparation for the 2019/2020 agricultural production season.

- Unlike the Northern and Eastern Regions of the country, the southern half has seen a deterioration of the food security situation. Crop failure, which has resulted in tight supplies of food crops at household and market level, coupled with the burden of livestock diseases, have resulted in reduced market participation among rural agricultural households. This has resulted in reduced income from agricultural output sales. While this may be the case, the government, through DMMU and FRA, has continued to provide relief food to the vulnerable households in communities that experienced crop failure as a result of the prolonged dry spells. So far, the main support line has been in the form of mealie meal. Other lines of support being explored to enhance food and nutrition security include the provision of pulses, soya pieces, and emergency social cash transfers. At the national level, the Stocks Monitoring Committee meeting held on September 20, 2019, established that the country currently has maize grain stocks of about 684,291.9 MT, based on reported stocks by FRA, GTAZ, MAZ, and ZNFU. This stock level is estimated to be enough to last for about six months, excluding any stock that is held in the hands of smallholder households and other small grain traders.

- The FRA has intensified its community sales to facilitate access to the main staple for the rural farm households that had a poor harvest and whose own produced grain has depleted. FRA community sales peg a 50kg bag at ZMW 110 per 50 kg, which is below the prevailing open market price, ranging from ZMW 115 – ZMW 200 per 50 kg bag, on average. However, distance to central depots remains a challenge for remote households.

- Rural farm households with a more diversified enterprise portfolio have proved to be more resilient to the effects of the weather and income shocks. This kind of resilience is real, especially for those engaged in gardening activities as livestock trading has remained limited in the light of the Foot and Mouth Disease (FMD) outbreak and the consequent livestock movement restrictions.

Current Situation

According to the recent qualitative assessment by IAPRI, the postharvest period has seen localized deficits of food crops owing to the agricultural drought season experienced in some parts of the country. The worst affected areas lie in the southern and western parts of the country. For instance, in several districts of the Southern Province, the availability of the main cereal crop, maize, and other seasonal foodstuffs (e.g., tubers, pumpkins) has reduced compared to what is considered a normal situation. Food stocks from own production among the poor rural households have drastically reduced. Such households began relying on the open market earlier than usual. Equally, livestock conditions and trade have been poor due to disease outbreaks and the subsequent livestock movement restrictions. The reduced physical supply of food crops, as well as reduced agricultural income from the sale of crops, livestock and livestock products, have
worsened the food security situation for the poor rural households. What is also worth noting is that, even in districts that are typically highly productive in terms of agricultural production, like Kalomo, Choma and Monze, the rural households started purchasing maize grain from the markets earlier than usual.

Movement of maize grain from other surplus regions in the northern parts of the country to the deficit areas in the south has been limited. Maize grain moving from these areas is ending up in high demand and consumption areas like Lusaka where there is a large concentration of millers and animal feed processors. Localized demand in these areas, which have had reasonable surplus, has also contributed to the limited outflow of the commodity to the deficit areas.

Notwithstanding the aforementioned, Government has responded through the Disaster Management and Mitigation Unit (DMMU) with relief food distribution activities, in the form of mealie meal, working with other concerned stakeholders. For households that can afford a 50 kg bag of maize grain, the Food Reserve Agency (FRA) has continued to service the population through community maize grain sales at ZMW 110 per 50 kg bag. This activity has at least facilitated access to the commodity as it is scarce and much more expensive on the open market. As of September 20, 2019, national stock levels stood at about 684,291.9 MT, which is estimated to be enough provision for about six months. Table 1 shows the stock levels since June 2019. Given that this includes estimated stock that is likely to be held by smallholder households and small traders, the coverage period may be long enough to see the country through to the next harvest.

Table 1. Reported and estimated maize stocks and drawdown for the period June 2019 –September 2019

<table>
<thead>
<tr>
<th></th>
<th>June</th>
<th>July</th>
<th>Aug</th>
<th>Sep</th>
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<tbody>
<tr>
<td><strong>Maize supply</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Production</td>
<td>A</td>
<td>2,004,389</td>
<td></td>
<td></td>
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<tr>
<td>Carry-over</td>
<td>B</td>
<td>475,042</td>
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<tr>
<td><strong>Maize utilization</strong></td>
<td></td>
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<tr>
<td>Estimated monthly requirement</td>
<td>D</td>
<td>165,000</td>
<td>165,000</td>
<td>165,000</td>
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<tr>
<td>Formal exports</td>
<td>E</td>
<td>150,000</td>
<td></td>
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<tr>
<td>Estimated informal exports</td>
<td>F</td>
<td>5,000</td>
<td>5,000</td>
<td>5,000</td>
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<tr>
<td><strong>Maize stock position</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total available stocks in-country</td>
<td>G = A+B - D-E-F</td>
<td>2,159,431</td>
<td>1,989,431</td>
<td>1,819,431</td>
</tr>
<tr>
<td>Reported stocks as at stocks meeting</td>
<td></td>
<td>475,042</td>
<td>730,493</td>
<td>684,291.90</td>
</tr>
<tr>
<td>Stocks with all other farmers</td>
<td></td>
<td>1,684,389</td>
<td>1,088,938</td>
<td>965,139.1</td>
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<tr>
<td>Reported stocks as a % of available stocks</td>
<td>22</td>
<td>40</td>
<td>41</td>
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</tbody>
</table>

Source. Stocks Committee reported estimates, and authors’ estimates from CFS and Food Balance Sheet

Community sales by FRA have intensified to facilitate access to the main cereal crop. However, distance has become a challenge for some of the affected households residing in far-flung remote areas from where the FRA stocks are. For example, in districts like Kazungula, one of the closest agricultural camp, Mandia, is about 45 km from Livingstone (where the rural households can access the commodity from FRA). Thus, households have to incur high transportation costs for the commodity as well as a household member
traveling to purchase the commodity. As a result, the purchasing power for the poorer households continues to be limited because of the resultant transaction costs.

Moreover, the price of maize grain has been higher than average this year. On the open market, maize grain, when available, is costing about ZMW 120 per 50 kg bag in Livingstone, whereas it is over ZMW 150 per 50 kg bag in Mongu district of Western Province. As maize supplies are tight, and the demand is high, there is an upward price trajectory in both deficit and surplus areas, with a resultant increase in mealie meal prices.

An assessment of food security status in selected districts of Kapiri Mposhi (Central Province), Mpongwe (Copperbelt Province), Mpika, Chinsali, Isoka (Muchinga Province), Lundazi, Chipata, Katete, Petauke, Nyimba (Eastern Province) indicates that smallholder households are relatively better off. This is mainly because of the relatively good harvest across a variety of crops which enabled them to sell the surplus, especially those in the Copperbelt and Eastern Province. Sales from crops like soya beans, sunflower, cotton, and groundnuts have improved agricultural incomes for market participating smallholder farmers. Those in the northern part of the country have taken advantage of high buying prices offered by traders within and outside the districts. In Mpongwe, competition among millers and animal feed producers has driven maize grain prices upward to the benefit of farmers with a surplus to sell.

Nevertheless, vulnerable households continue to employ various coping strategies — for example, livestock sales and other off-farm income activities such as working in lodges. Fishing is limited to those that reside near water bodies, and this type of population is small. Besides, fishing activities are typically banned from December to February each year to allow the fish to breed. Gardening activities have also intensified with those nearby water bodies ending up digging on the river bed to secure water points.

Livestock conditions remain poor due to the degenerated pastures as well as limited water availability. Large ruminants like cattle have to travel longer distances than usual at this time of the year in search of water. This activity has equally affected livestock trading activities. Livestock thefts which are atypical at this time of the year have been reported in districts like Monze, and Namwala. These have been attributed to the prevailing stressed food security situation.

2019/2020 Agricultural Season Outlook

Normal to above normal rainfall is expected in the 2019/2020 season over most parts of the country (Zambia Meteorology Department (ZMD), 2019). The ZMD has been actively disseminating the forecast to the relevant stakeholders using innovative approaches. Among these approaches include the translation of the forecast in local languages broadcasted on different media platforms, and district meetings with extension personnel for the forecast to reach the intended end-users like farmers. While effective rains are forecasted to start by the second week of November 2019, there is also a chance of the southern half of the country experiencing dry spells in February 2020. The early establishment of rains over most parts of the country entails that early planting and adoption of early to medium maturing seed varieties is the way to go for farmers. Already, FISP activities, farmer deposits and input acquisition at district level, are progressing well with farmers most likely to have access to the inputs in good time. For livestock rearing areas, the normal to above normal rainfall is expected to result in regeneration of pastures and possible refill of existing and new water points for animals.
Also, the normal to above normal rains means there is potential for flooding, waterlogging, and soil erosion which has the potential to lead to crop loss and damage to infrastructure such as roads and bridges. Consequently, farmers in flood-prone areas may think of planting on higher grounds to minimize the incidences of waterlogging. The expected dry spells in February may result in water stress which may cause the wilting of crops if they prolong, especially for the crop planted late. Therefore, crop conditions during this period will require continuous monitoring, especially in the southern half of the country. Nevertheless, the amount of rain is expected to be adequate during critical stages of crop development such as germination and grain filling. Overall, compared to the last season, food availability is expected to be more favorable in terms of quantities and variety.

**Conclusion**

Poor households in deficit areas of the southern parts of the country have limited food stocks from their own production. Extreme deficits have been localized in the southern half of the country, particularly Southern Province which is atypical. As a result, the reliance on market purchases and FRA community sales has increased. The supply of agricultural produce on the market has generally been lower than usual even in areas, such as the Central, Copperbelt, Northern, Muchinga and Eastern Provinces, where the season performed relatively well in terms of crop production. Consequently, maize grain and mealie meal prices have risen above average across the country, negatively affecting both rural and urban consumers whose diet mainly constitute the main staple cereal. For those with limited purchasing power, DMMU is facilitating access to relief food. Without any assistance, the situation would have deteriorated fast going into the lean period.

Apart from the reduced supplies of food crops, water scarcity continues to affect domestic use and livestock conditions (in addition to the disease outbreaks). Below-average agricultural incomes, as a result of a poor production and marketing season, in the southern and western parts of the country, are likely to affect preparations for the 2019/20 agriculture season because farmers in some of these parts have limited income to purchase the required agricultural inputs.

In Southern Province, smallholders with diverse enterprise portfolio have been more resilient to the effects of weather shocks experienced in the 2018/19 production season. Further, the household location for the resilient farmers within the province has made a difference. Those located near water bodies, with water flowing all year round, have been able to intensify gardening activities that are cushioning the income shocks as a result of crop failure.

The coordination of relief food activities among concerned stakeholders is expected to be enhanced further following the launch of the In-depth Vulnerability Assessment Report of 2019/2020 by DMMU. Additional lines of relief support have been proposed, and these include provision of pulses, and soya pieces among others in the short, medium, and long term as detailed in the recovery action plan by DMMU.

**Recommendations**

**Short term**

Concerned stakeholders should collaborate with DMMU and assist the FRA to meet operational costs that are associated with holding maize stocks in satellite depots that are closer to communities identified to be
in dire need of the main staple cereal. This will reduce on the distance households have to cover and transaction costs they are likely to incur while trying to access maize grain from FRA satellite depots.

The exploration of emergency social cash transfers as well as the delivery mechanism should be intensified. Emergency social cash transfers have already demonstrated their effectiveness when it comes to facilitating access to more diverse food items and the acquisition of productive assets in places where the markets are functional.

A rapid post-harvest assessment at the household level would be helpful, as suggested during the Stocks Monitoring Committee meeting held on September 20, 2019. This assessment would help to establish a more accurate picture of maize grain stocks at the household level, in the country, which has been missing from all the reported stock figures.

**Medium to long term**

There is a need to explore options for blended mealie meal (e.g., maize meal and cassava). Cassava production is very resilient to the effects of climate change. Thus, blending it with maize meal would help stabilize the availability of mealie meal.

For the Southern Province and other productive areas, that are prone to prolonged dry spells, there is a need to develop additional irrigation systems and improve on the existing ones. While doing so, the water recharge points, as well as the vegetation surrounding the water bodies, should be protected against environment degrading activities such as deforestation.
References