



GIEWS Country Brief Mozambique

Reference Date: 09-January-2023

FOOD SECURITY SNAPSHOT

- **Dryness in localized areas, but generally favourable weather conditions at start of 2022/23 cropping season**
- **Average cereal crop harvested in 2022; import requirements increase moderately**
- **Food prices rise, underpinned by elevated import costs**
- **High levels of food insecurity due to weather-reduced harvests, conflict and high food prices**

Dryness in localized areas, but generally favourable weather conditions at start of 2022/23 cropping season

Planting of the 2023 cereal crops is underway and is expected to finish in January. Early season dryness has affected the northern provinces of Cabo Delgado and Nampula, where below-average soil moisture levels are affecting sowing activities and early crop emergence. Moderate rainfall deficits were observed in localized areas of some southern and central provinces, but overall rainfall levels between October and December 2022 have been average to above average in areas outside of the two aforementioned northern provinces, supporting planting operations.

In addition to a slow start of the rainy season, persisting attacks by Non-state armed groups (NSAGs) in Cabo Delgado have continued to cause population displacements, effectively halting people's livelihoods and likely contributing to a low level of plantings in the 2022/23 cropping season.

Average cereal crop harvested in 2022; import requirements increase moderately

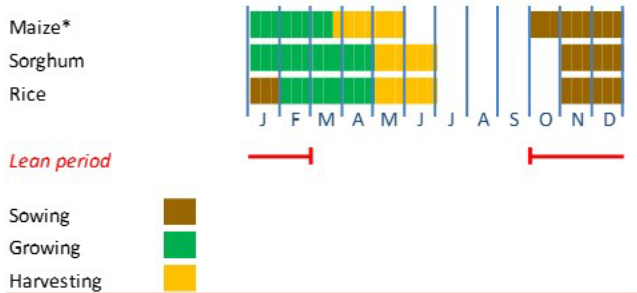
Cereal production in 2022 is estimated at an average level of 2.7 million tonnes, up from the reduced output of 2021. The impact of several tropical storms, as well as Cyclone Gombe that made landfall in March 2022, resulted in crop damage and losses in the main cereal producing central and northern provinces, containing overall production levels in 2022.

Cereal import requirements are forecast at 1.6 million tonnes in the 2022/23 marketing year (April/March), moderately above the previous five-year average. Import requirements of rice are estimated at an above-average level of 680 000 tonnes, reflecting a small downturn in production in 2022 and, therefore, a moderately larger domestic supply gap. Maize imports are forecast at a near-average level of 250 000 tonnes, with most

Mozambique

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FEWS NET, USDA.

Mozambique

Cereal Production

	2017-2021 average	2021	2022 estimate	change 2022/2021
	000 tonnes			percent
Maize	2 180	1 824	2 135	17.0
Rice (paddy)	384	390	365	-6.4
Sorghum	141	147	153	4.0
Others	45	38	33	-12.8
Total	2 751	2 399	2 685	11.9

Note: Percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheet.

imports sourced from neighbouring South Africa and destined for southern provinces, given the prohibitively high costs of transporting maize from northern provinces. Imports of wheat, which is not grown in the country, are forecast at an average level of 650 000 tonnes, as an expected drawdown in stocks is seen limiting import growth. In the preceding three marketing years, wheat supplies from the Russian Federation and Ukraine accounted for an average of 38 percent of the total imported wheat quantity; however, there have been no imports from these two countries in the 2022/23 marketing year, reflecting export constraints following the outbreak of the war. Larger import quantities from India have helped compensate for the reduced import volumes from the Black Sea Region.

Food prices rise, underpinned by elevated import costs

The annual food inflation rate was estimated at 20 percent in November 2022, up from 10 percent in the corresponding month of 2021. Although still elevated, price growth has slowed marginally from a peak in August. The high inflation rate is largely underpinned by the surge in global food and energy prices, although a stable exchange rate has stymied a more pronounced price transmission to the domestic market. To combat inflationary pressure, the government raised the policy interest rate twice in 2022 and agreed to reduce the Value-added tax (VAT) rate by 1 percent at the start of 2023.

High levels of food insecurity in Cabo Delgado due to conflict and high food prices

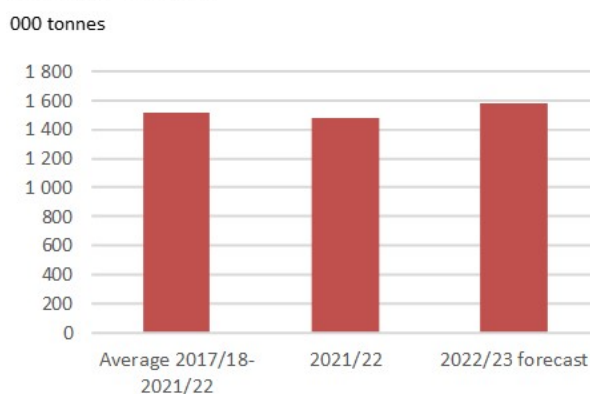
Results from the latest Integrated Food Security Phase Classification (IPC), acute food insecurity analysis are still undergoing verification and projections on the number of food insecure people between January and March 2023, during the peak of the lean period, are not yet available. Earlier IPC analysis had projected that 1.44 million people faced IPC Phase 3 (Crisis) and above levels of acute food insecurity between March and September 2022. This analysis covered less than half the national population but included the conflict-affected Cabo Delgado Province where 930 000 people were categorized as food insecure, including about 24 000 people in IPC Phase 4 (Emergency).

Despite the small increase in cereal production in 2022, food security is not expected to improve significantly in early 2023 for two key reasons. Firstly, food prices surged in 2022 and, without a concurrent and substantive increase in incomes, households are expected to continue to experience food access constraints. Secondly, persisting attacks by NSAGs in Cabo Delgado have led to a rise in the number of Internally displaced persons (IDPs). As of October 2022, nearly 950 000 people had been displaced, 30 percent more compared to the previous year. IDPs face the highest levels of acute food insecurity, while the violent incidents also hinder the adequate delivery of essential humanitarian assistance. The potential landfall of cyclones in early 2023 is an additional factor that could adversely impact people's livelihoods and by extension aggravate food insecurity.

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Mozambique

Cereals Imports



Notes: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.



GIEWS Country Brief

Mozambique

Reference Date: 16-August-2022

FOOD SECURITY SNAPSHOT

- Cereal production in 2022 estimated at below-average level, as adverse weather conditions and impact of conflicts curtail crop yields and cause localised crop losses
- Cereal import requirements in 2022/23 forecast to rise to above-average level
- Elevated global prices of energy and foods push up domestic prices
- Worsening conflict, high prices and localized shortfalls in crop production foreseen to amplify humanitarian needs in 2022/23

Cereal production forecast below five-year average in 2022

Harvesting of the main 2022 season cereal crops was completed in June and total cereal production, including the minor secondary season crops to be harvested in the third-quarter of the year, is forecast at a below-average level of 2.6 million tonnes in 2022, pending official estimates.

At the subnational level and primarily reflecting regional variations in weather conditions, cereal harvests differed across the country. In southern provinces, which account for a small proportion of the total national cereal output, harvests are estimated at well below-average levels mainly reflecting the impact of substantial rainfall shortages between February and March 2022. In the main cereal producing central provinces, namely Manica and Sofala, southern parts experienced below average rainfall amounts and an irregular distribution, resulting in crop failure and low yields. By contrast, cereal crops in northern areas of these provinces fared better, owing to broadly conducive weather conditions. Consequently, total harvests in central provinces are estimated to be close to the five-year averages. In the northern provinces, the temporal distribution of rains and total cumulative amounts were generally beneficial for crops and cereal outturns in these provinces, which contribute about one-quarter to the national cereal outturn, are estimated at near-average levels in 2022.

The impact of several tropical storms, as well as Cyclone Gombe that made landfall in March 2022, also caused crop damage and losses in the central and northern provinces, contributing to the low output in 2022; cumulatively more than 220 000 hectares of cropland were affected by the extreme weather events. Cyclone Gombe alone resulted in an estimated 20 500 hectares of cropland in Zambezia and Nampula provinces (less than

Mozambique

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FEWS NET, USDA.

Mozambique

Cereal Production

	2017-2021 average	2021	2022 forecast	change 2022/2021
	000 tonnes			percent
Maize	2 216	2 000	1 900	-5.0
Rice (paddy)	384	390	365	-6.4
Sorghum	292	300	302	0.7
Others	66	65	64	-1.5
Total	2 958	2 755	2 631	-4.5

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

5 percent of the area planted with cereals) being inundated, according to [FAO's geospatial analysis](#). In addition to crop and livestock losses, the cyclone caused losses of fishing gear, destruction of boats and damage to agricultural infrastructure, including irrigation systems, which is likely to impact crop production during the 2022 secondary season. Persisting insecurity in Cabo Delgado, which continued to severely impede farmers' ability to access to agricultural inputs, including land, was another factor that limited crop production in the northern provinces in 2022.

Cereal imports forecast to increase in 2022/23

The cereal import requirement is forecast at 1.7 million tonnes in the 2022/23 marketing year (April/March), 13 percent more than the previous five-year average and the imported quantity in 2021/22.

Import requirements of rice are estimated at an above-average level of 780 000 tonnes, reflecting the downturn in production and therefore a moderately larger domestic supply gap. Maize imports, for both food and feed use, are forecast at 275 000 tonnes, slightly above the five-year average, with most imports sourced from neighbouring South Africa.

By contrast, imports of wheat, which is not grown in the country, are forecast at an average level of 650 000 tonnes, as a drawdown in stocks is expected to limit import growth amid high global prices. In the preceding three marketing years, wheat supplies from the Russian Federation and Ukraine accounted for an average of 38 percent of the total wheat imports. Mozambique may therefore face supply constraints as it seeks to secure supplies from alternative origins given the supply disruptions caused by the war in Ukraine and the subsequent hike in global prices.

Food prices rise, underpinned by elevated global prices

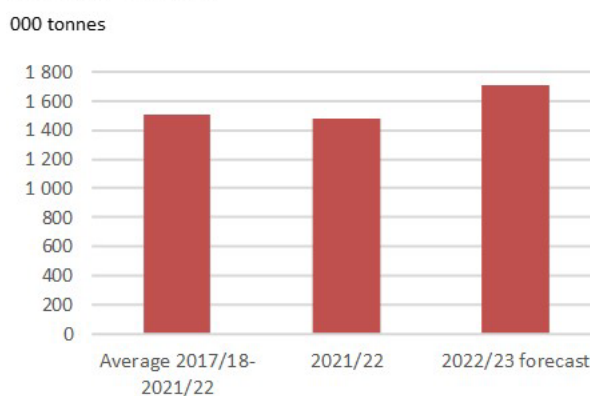
The annual food inflation rate was estimated at 10 percent in June 2022, up from 8 percent in January 2022. Inflation growth has been underpinned by rising prices of food and transportation, owing to the elevated global prices. However, unlike several neighbouring countries, the value of the national currency (metical) against the US dollar has remained stable in 2022, helping to curb imported inflationary pressure, while government price subsidies for fuel and wheat have also partly cushioned the effects of higher import costs.

Number of food insecure people seen to rise in 2022/23

The IPC acute food insecurity forecast for the peak lean period between December 2022 and March 2023 is not yet available. However, the number of people in need of food assistance is expected to rise above the 1.86 million estimated in 2021/22 because of three key factors. Firstly, higher year-on-year prices of food and fuel are reducing households' purchasing power, worsening their economic access to food, particularly for low-income households. Secondly, the impact of extreme weather events on agricultural production in central and southern provinces in 2022 is likely to mean that farming households in the affected areas have both low food supplies from own production and curtailed income-earning opportunities from crop sales, impinging on their food availability and economic access to food. Thirdly, there has been an increase in attacks by non-state armed groups in the northern province of Cabo Delgado in 2022,

Mozambique

Cereals Imports



Notes: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

and this has led to a rise in the number of internally displaced persons (IDPs). As of June 2022, 946 508 people had been displaced in northern areas affected by conflict, up by more than 30 percent compared to the previous year; IDPs are facing the highest levels of acute food insecurity. The increased number of insecurity incidents has also disrupted the delivery of humanitarian assistance.

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GIEWS Country Brief Mozambique

Reference Date: 08-June-2021

FOOD SECURITY SNAPSHOT

- Harvesting of 2021 main cereal crops is about to conclude and production is forecast at near-average level
- Cereal import requirements in 2021/22 forecast at near-average level
- Food prices increased amid depreciation of national currency
- Worsening conflict and effects of COVID-19 pandemic deteriorate food security in 2021

Cereal production forecast at near-average level in 2021

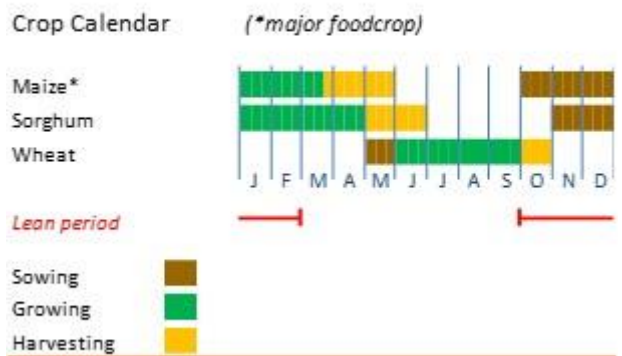
Harvesting of the 2021 cereal crops, mainly maize, is nearly complete. Cereal outputs in central and southern provinces are anticipated at average to above-average levels, while outputs in northern provinces, particularly in Cabo Delgado, are expected at a reduced level. FAO's forecast of the national cereal output stands at a near-average level of 2.8 million tonnes in 2021, 5 percent below the high level in 2020, reflecting the negative effects of weather hazards and the conflict on plantings and crop yields.

Weather conditions during the last quarter of 2020 were generally conducive for planting operations and crop establishment in the main cereal producing central provinces. Between December 2020 and February 2021, torrential rains and strong winds due to the landfall of tropical storm "Chalane" and cyclones "Eloise" and "Guambe" caused flash floods and resulted in localized damage to standing crops in coastal areas. In central inland areas, heavy rains boosted soil moisture levels and supported crop development. In the southern provinces of Maputo, Gaza and Inhambane, above-average cumulative rainfall benefited crops in interior areas, while drought conditions followed by localized floods affected the coastal areas, prompting farmers to replant crops. In northern areas, reduced rainfall amounts between October 2020 and February 2021 curtailed planting operations and yields are expected at average levels. In particular, in Cabo Delgado Province, a well below-average cereal harvest is expected as farming activities have been severely disrupted by the ongoing conflict.

Near-average cereal import requirements in 2021/22

Aggregate cereal import requirements are estimated at a near-average level of 1.5 million tonnes in the 2021/22 marketing

Mozambique



Source: FAO/GIEWS, FEWSNET.

Mozambique

Cereal Production

	2016-2020 average	2020	2021 forecast	change 2021/2020
	000 tonnes			percent
Maize	2 113	2 150	2 000	-7.0
Rice (paddy)	387	450	455	1.1
Sorghum	280	290	300	3.4
Others	64	65	65	0.0
Total	2 844	2 955	2 820	-4.6

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

year (April/March), about 16 percent below the large volume imported in 2020/21.

Import requirements of wheat are estimated at 650 000 tonnes, 13 percent below the five-year average, due to ample availabilities from carryover stocks. Import requirements of rice are estimated at average 615 000 tonnes, while maize imports are estimated at 230 000 tonnes, slightly higher on a yearly basis reflecting the expected decline in 2021 production.

Food prices increased driven by depreciation of national currency

The annual food inflation rate was estimated at 11 percent in April 2021, partly driven by the depreciation of the national currency throughout 2020 and early 2021. In February 2021, the metical reached its lowest value in the previous four years and, as of March, had lost over 10 percent of its value against the US dollar on a yearly basis.

A significant inflow of US dollars into the country due to higher revenues from exports of primary commodities, spurred an appreciation of the domestic currency in April and May 2021, which is likely to have helped contained import inflationary pressure on food prices. The metical has, however, begun to depreciate again in June.

Worsening of conflict and COVID-19 impacts deteriorate food security in 2021

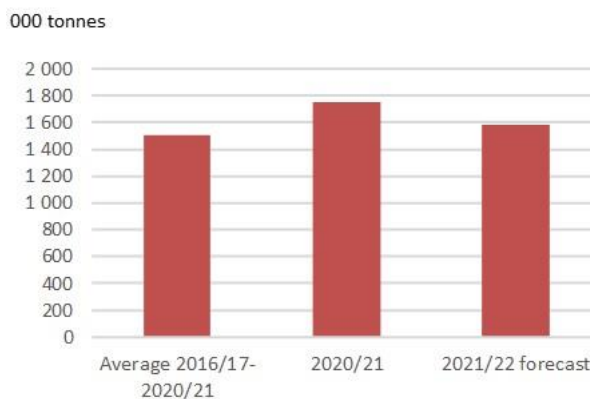
According to the latest IPC analysis released in January 2021, the number of people facing acute food insecurity in the April-September 2021 period was projected at 1.7 million. Although, at the national level, the prevalence of food insecurity has decreased compared to the January-March 2021 period, primarily reflecting an improvement in food supplies from the main harvest, the situation in the northern province of Cabo Delgado has worsened. The number of food insecure people in Cabo Delgado is estimated at 770 000 in the April-September 2021 period, an increase of about 15 percent over the previous period due to the effects of the persisting conflict and the impact of rainfall deficits on agricultural production ([GIEWS Update](#)). However, as the conflict has intensified since the release of the IPC analysis in January 2021, the actual number of food insecure people could be even higher. Major concerns are for the food security situation of Internally Displaced People (IDPs), estimated at 725 000 as April 2021, that were not able to engage in agricultural activities during the 2020/21 season and, according to recent assessments, IDPs have no access to any income generating activities.

In addition, some measures to control the COVID-19 pandemic that were reintroduced in the January-May 2021 period, are likely to have curtailed a recovery in households' incomes. In early June, restrictions eased and this is expected to have a positive impact on households' access to food.

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Mozambique

Cereals Imports



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.



GLEWS Country Brief Mozambique

Reference Date: 05-February-2021

FOOD SECURITY SNAPSHOT

- Extreme weather events and dry conditions curb production expectations for 2021 cereal crops
- Cereal production in 2020 estimated above five-year average
- Cereal import requirements in 2020/21 estimated slightly higher than average
- Prices of maize mostly stable in second half of 2020
- Pandemic, extreme weather events and insecurity aggravate food insecurity in 2021

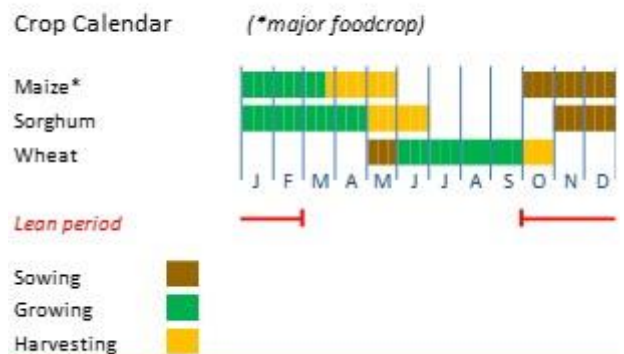
Extreme weather events and dry conditions curb production expectations for 2021 cereal crops

Planting of the 2021 cereal crops is complete. Following a good start to the rainy season in October 2020, a period of below-average rains in November in central and northern provinces led to the development of moderate moisture deficits and caused planting delays. Reduced rainfall levels continued in northern provinces, particularly in coastal areas, in the subsequent two months and resulted in large seasonal rainfall deficits and poor vegetation conditions as of late January 2021.

In central provinces, the landfall of Tropical storm “Chalane” in late December 2020 brought significant rainfall to Sofala and Manica provinces, already affected by Cyclone “Idai” in 2019, but it caused only minimal damage to the agriculture sector. On 23 January 2021, Cyclone “Eloise” made landfall in central provinces, bringing heavy rainfall and causing localized floods. The cyclone resulted in the displacement of rural populations, damage of infrastructure and disruptions to farming activities. Initial assessments indicate that over 100 000 hectares of cropped land were affected, but the extent of damage to crops is not yet known.

For the February-April 2021 period, below-average rainfall amounts are forecast for southern parts of the country, while average to above-average amounts are forecast in central and northern parts. Although the weather outlook portends to generally favourable conditions for crops, particularly in the main producing areas, the risk of more cyclones remains. Although the 2021 national cereal production is expected to remain near average, crop losses due to extreme weather events, including cyclones and droughts, are likely to result in production shortfalls in localized areas.

Mozambique



Source: FAO/GIEWS, FEWSNET.

Mozambique

Cereal Production

	2015-2019 average	2019	2020 estimate	change 2020/2019
	000 tonnes			percent
Maize	1 935	2 085	2 150	3.1
Rice (paddy)	369	341	450	32.0
Sorghum	266	325	290	-10.6
Others	61	79	65	-18.0
Total	2 632	2 830	2 955	4.4

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Cereal production in 2020 estimated above five-year average

Aggregate cereal production is estimated at 3 million tonnes in 2020, 12 percent above the five-year average and 5 percent more than the previous year's output. The larger output in 2020 was largely the result of an increase in the area harvested, following substantial crop losses in 2019 due to the effects of two cyclones.

Cereal import requirements in 2020/21 estimated slightly above average

Aggregate cereal import requirements are estimated at nearly 1.5 million tonnes in the 2020/21 marketing year (April/March), slightly above the previous year and 6 percent above the five-year average. Most of the import needs are related to rice and wheat, quantities of which are forecast at near-average levels of 615 000 and 650 000 tonnes, respectively. The remaining amount is maize, which is likely to be sourced from neighbouring South Africa. Although the supplies of these cereals are estimated to be ample in the international markets, the depreciation of the national currency during 2020 has had a detrimental impact on the country's import capacity and could exert upward pressure on domestic prices during the next months, when supplies from local production dwindle and imports cover an increasing share of domestic consumption.

Prices of maize mostly stable in second half of 2020

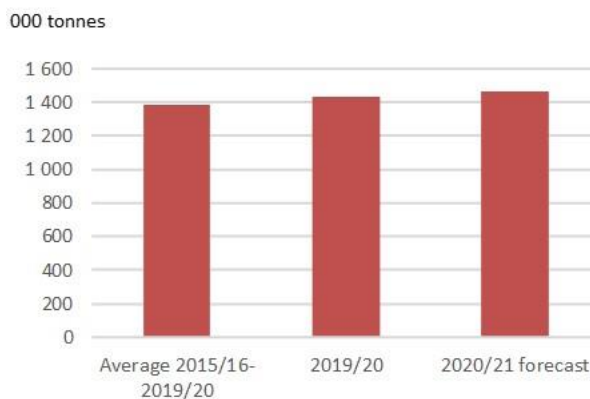
Retail prices of white maize increased moderately since June 2020 and, as of November, they were lower on a yearly basis. The generally stable prices are attributed to the adequate national supply situation following the production upturn in 2020. In addition, food markets and internal trade of staple foods were reported to have been functioning relatively normally during the pandemic, limiting the localized supply shortfalls and preventing price spikes. However, the depreciation of the national currency throughout 2020 is likely to exert upward pressure on prices in early 2021. As of January 2021, the Mozambican metical had lost over 20 percent of its value against the US dollar over the previous 12 months.

Food insecurity to peak in early 2021 due to economic downturn, conflict and extreme weather events

According to the latest IPC analysis released in mid-January 2021, the number of food insecure people for the January-March 2021 period was estimated at 2.9 million, slightly above the estimated 2.7 million during the October-December 2020 period. Most of the food insecure people are located in rural areas (2.1 million) in southern provinces of Inhambane, Gaza and Maputo and in the northern province of Cabo Delgado. The increased level of food insecurity is the result of drought-induced production shortfalls in southern provinces in 2020 and internal displacements in northern provinces due to a resurgence of violence in Cabo Delgado Province. In addition, reduced income-generating opportunities and low remittances due to the pandemic-induced economic downturn have contributed to exacerbate households' vulnerability.

Mozambique

Cereals Imports

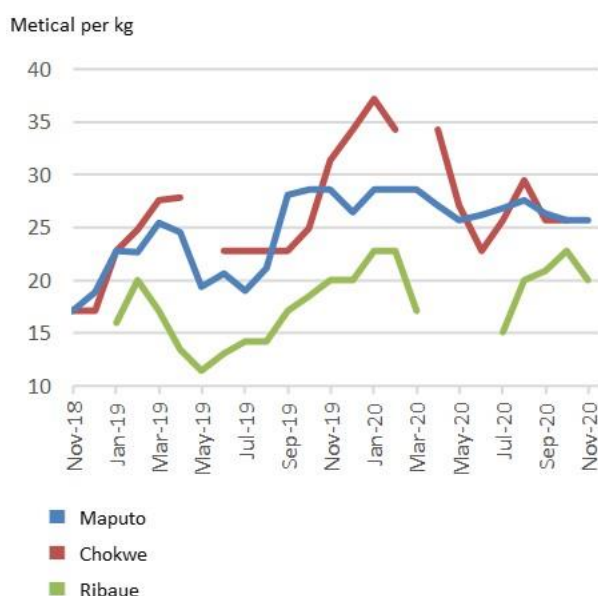


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Mozambique

White maize retail prices in selected markets



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

Prior to the landfall of Cyclone “Eloise” in late January, the food security situation was expected to improve during the April-September 2021 period, with a projection of 1.7 million people in need of food assistance, reflecting increased food availability from the main harvest. However, the negative effects of the cyclone, which has affected about 314 000 people, could limit the extent of seasonal food security improvements. Furthermore, the introduction of new containment measures in January 2021 to slow the spread of the COVID-19 pandemic following a recent upsurge in cases, is likely to further affect economic activities and exert additional pressure on the already eroded resources of the households. The new measures include a 30-day curfew, enforced from 5 February 2021, in the greater Maputo area, while land borders with South Africa were closed earlier in January.

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GIEWS Country Brief Mozambique

Reference Date: 12-January-2021

FOOD SECURITY SNAPSHOT

- Mixed early conditions for 2021 cereal crops
- Cereal production in 2020 estimated above five-year average
- Cereal import requirements in 2020/21 estimated slightly higher than average
- Prices of maize mostly stable in second half of 2020
- Pandemic and insecurity aggravate food insecurity

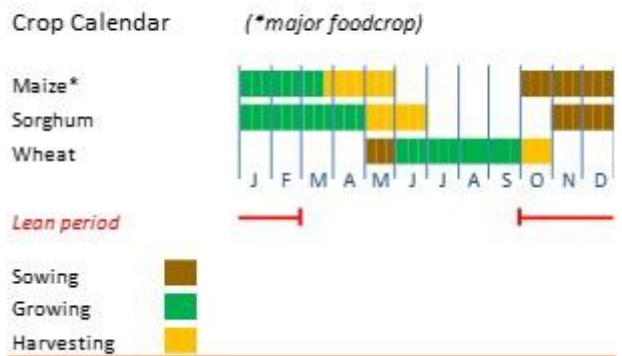
Mixed early conditions for 2021 cereal crops

Planting of the 2021 cereal crops was completed in southern and central regions in December and sowings in northern regions are expected to be finalized in January.

The rainy season started in October 2020 and precipitation amounts were generally near average, helping to replenish soil moisture levels following the dry season. A period of below-average rains was recorded in November in central and northern provinces that led to the development of moderate moisture deficits and caused planting delays. Rainfall levels increased in December across most of the country, except for coastal areas of northern provinces, which led to large seasonal rainfall deficits and resulted in poor vegetation conditions. The formation of Tropical storm Chalane in late December brought significant rainfall in Sofala and Manica provinces, which was previously impacted by Cyclone Idai in 2019. However, the storm is reported to have caused only minimal damage to the agriculture sector.

For the January-March 2021 period, near-average rainfall amounts are forecast for most of the country, which augurs well for yield prospects of the 2021 cereal crops. However, there is a higher-than-normal probability of increased cyclone activity between January and April 2021 in the southwest Indian Ocean. In addition, the prevailing oceanic and atmospheric conditions also favour a westward trajectory for cyclones, raising the likelihood of landfalls. Such weather events could cause the loss of standing crops and food stocks as well as damage to agricultural infrastructure. Additionally, considering the impact of the COVID-19 pandemic, in terms of income and job losses, and consequently a reduced resilience of the population, increased support should be provided to farmers to help improve their preparedness for such weather shocks (please see [here](#) for further information).

Mozambique



Source: FAO/GIEWS, FEWSNET.

Mozambique

Cereal Production

	2015-2019 average	2019	2020 estimate	change 2020/2019
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Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Cereal production in 2020 estimated above five-year average

Aggregate cereal production is estimated at 3 million tonnes in 2020, 12 percent above the five-year average and 5 percent more than the previous year's output. The larger output in 2020 was largely the result of an increase in the area harvested, following substantial crop losses in 2019 due to the effects of two cyclones.

Cereal import requirements in 2020/21 estimated slightly above average

Aggregate cereal import requirements are estimated at nearly 1.5 million tonnes in the 2020/21 marketing year (April/March), slightly above the previous year and 6 percent above the five-year average. Most of the import needs are related to rice and wheat, quantities of which are forecast at near-average levels of 615 000 and 650 000 tonnes, respectively. The remaining amount is maize, which is likely to be sourced from neighbouring South Africa. Although supplies of these cereals are estimated to be ample in international markets, the depreciation of the national currency during 2020 has had a detrimental impact on the country's import capacity and could exert upward pressure on domestic prices during the next months, when supplies from local production dwindle and imports cover an increasing share of domestic consumption.

Prices of maize mostly stable in second half of 2020

Retail prices of white maize increased moderately since June 2020 and, as of November, they were lower on a yearly basis. The generally stable prices are attributed to the adequate national supply situation following the production upturn in 2020. In addition, food markets and internal trade of staple foods were reported to have been functioning relatively normally during the pandemic, limiting localized supply shortfalls and preventing price spikes. However, the depreciation of the national currency throughout 2020 is likely to exert upward pressure on prices in early 2021.

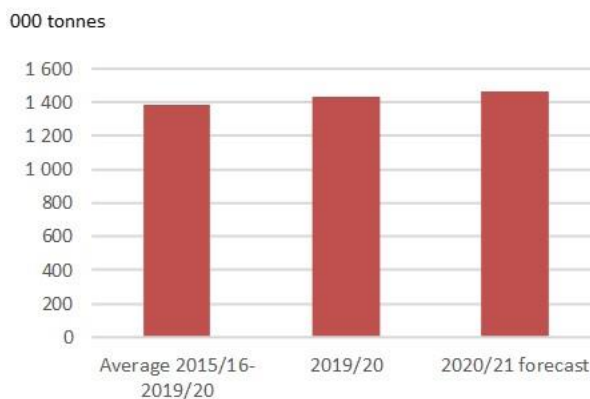
Pandemic and insecurity aggravate food insecurity

Pending the results from an ongoing IPC analysis, food insecurity numbers are not yet available for 2021. In 2020, the number of food insecure peaked at 1.7 million people in the January-February 2020 period. The number for 2021 is likely to be similar or higher on account of the impact of the COVID-19 pandemic, localized shortfalls in cereal production in southern provinces in 2020 and the effects of insecurity in northern regions, where over 550 000 people have been displaced, almost entirely from areas in Cabo Delgado.

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Mozambique

Cereals Imports

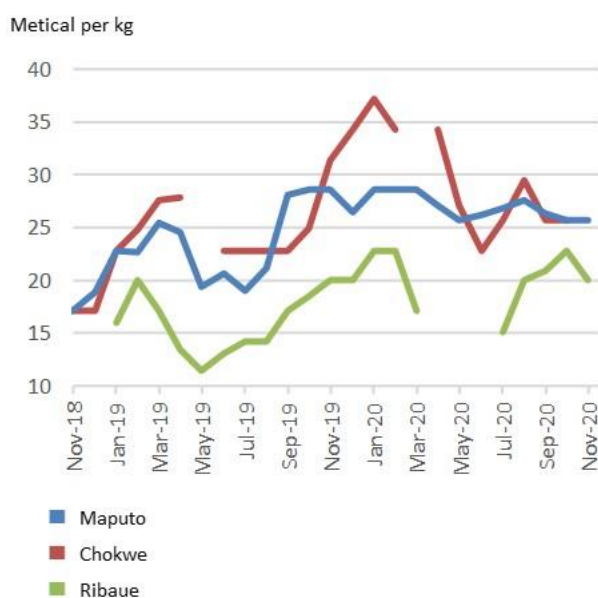


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Mozambique

White maize retail prices in selected markets



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Mozambique

Reference Date: 28-July-2020

FOOD SECURITY SNAPSHOT

- Cereal production in 2020 estimated above five-year average, reflecting production gains in central and northern regions
- Cereal import requirements in 2020/21 estimated slightly higher than average
- Prices of maize declined in recent months, but remained higher year on year
- Prior to COVID-19 pandemic, 1.7 million people estimated to be food insecure in early 2020
- Effects of pandemic and resurgence in violence in northern Cabo Delgado expected to contribute to increase food insecurity in 2020

Cereal production in 2020 estimated above-average

Harvesting of the main cereal crops was completed in June and aggregate production in 2020 is estimated at 3 million tonnes, 12 percent above the average and 5 percent above the previous year. The larger output in 2020 mostly reflects an expected increase in the area harvested due to substantially less crop losses compared to the previous year when two cyclones traversed the major cereal-producing areas and average yields.

The bulk of the cereal outturn is comprised of maize, with an output in 2020 estimated at 2.1 million tonnes, while the paddy harvest is estimated at 0.5 million tonnes, both above the weather-reduced levels in 2019 and above their respective averages. Most of the yearly production increase was concentrated in central and northern areas that offset the shortfalls in production in the minor producing southern areas.

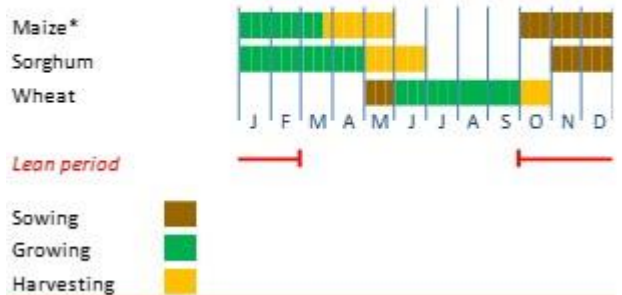
Cereal imports requirements in 2020/21 estimated slightly above average

Aggregate cereal import requirements, mostly rice and wheat, are estimated at 1.47 million tonnes in the 2020/21 marketing year (April/March), slightly above the previous year and 6 percent above the five-year average. The modest growth in aggregate imports reflects an increased requirement of maize imports, following the reduced production of maize in 2019 and the localized shortfalls in production in the south in 2020. However, a drawdown of existing cereal stocks prevented a larger increase in import needs. Import requirements of rice and wheat are estimated at a near-average level of 615 000 and 650 000 tonnes, respectively.

Mozambique

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Mozambique

Cereal Production

	2015-2019 average	2019	2020 forecast	change 2020/2019
	000 tonnes			percent
Maize	1 935	2 085	2 150	3.1
Rice (paddy)	390	350	460	31.6
Sorghum	266	325	290	-10.6
Others	61	79	65	-18.0
Total	2 653	2 839	2 965	4.5

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Prices of maize declined in previous months, but remained higher year on year

Retail prices of white maize increased steadily since mid-2019 until February 2020, mostly due to a tight supply situation following widespread crop losses in 2019 caused by two cyclones. Subsequently, prices of white maize declined between March and June 2020 in most markets, reflecting improved market supplies from the main 2020 harvest. Despite the recent decreases, prices of white maize were on average over 15 percent higher than their year-earlier values.

Prevalence of food insecurity likely to increase in 2020

Prior to the COVID-19 pandemic, nearly 1.7 million people were projected to be food insecure in the October 2019-February 2020 period, more than double the level of the corresponding period in 2018/19, according to the last IPC assessment conducted in June 2019. The expected deterioration in food insecurity reflected the impact of extreme weather events on 2019 production as well as the sustained increase in food prices in late 2019 and early 2020.

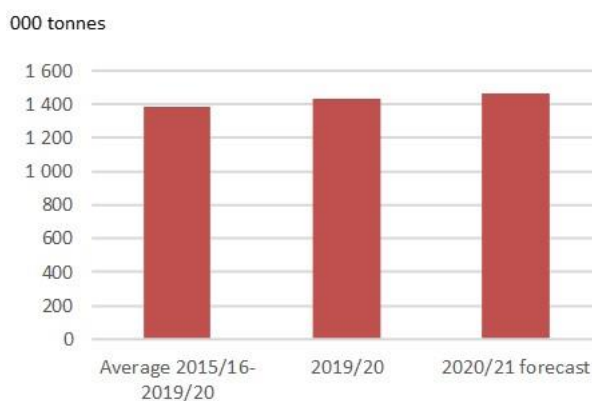
Despite the arrival on the markets of the recently harvested crops, the food security situation across the country is likely to deteriorate due to the effects of the COVID-19 pandemic, through both income losses associated with the economic downturn and the potential disruptions to the food supply chains. Furthermore, the production shortfalls in the south are likely to negatively affect households' food supplies and reduce the income-generating opportunities from crop sales in rural areas, further constraining access to food. A pilot IPC assessment in the southern cities of Maputo and Matola, released in early July, indicated that 365 000 people, or 15 percent of the cities' population, were estimated to be food insecure in the June-September 2020 period. The high prevalence of food insecurity in urban areas is mainly due to reduced casual labour opportunities, lower levels of remittances and high prices of food items.

Additional concerns remain for the food security situation in the northern province of Cabo Delgado, where a resurgence in violence in the first half of 2020 has resulted in the internal displacement of about 250 000 people and has severely hampered the delivery of humanitarian assistance. In this province, as of July 2020, about 310 000 people were estimated to be severely food insecure.

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Mozambique

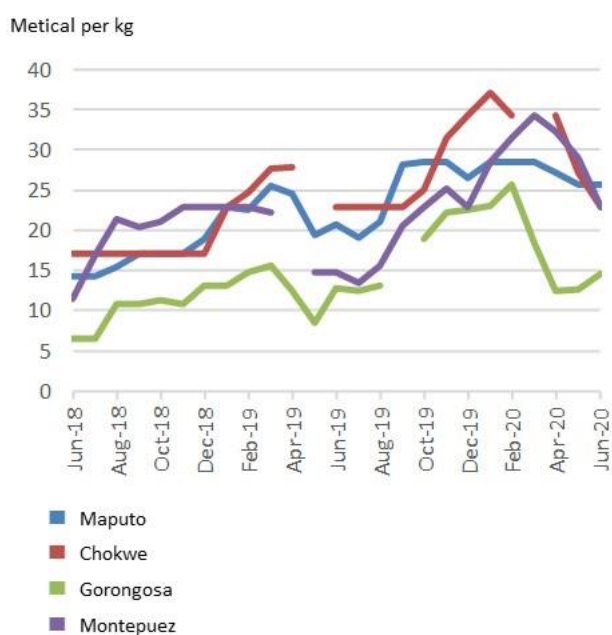
Cereals Imports



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).
Source: FAO/GIEWS Country Cereal Balance Sheets.

Mozambique

White maize retail prices in selected markets



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Mozambique

Reference Date: 09-April-2020

FOOD SECURITY SNAPSHOT

- Unfavourable weather conditions characterized by dry spells and excessive rains, weakened production prospects of 2020 cereal crops
- Aggregate cereal import requirements estimated slightly above-average in 2019/20 marketing year
- Prices of maize continued to increase in early 2020 and well above year-earlier levels
- Food security conditions worsened significantly in 2019 and effects of COVID-19 may further contribute to increase food insecurity in 2020

Unfavourable weather conditions weaken production prospects of 2020 cereal crops

Harvesting of the 2020 maize crop is ongoing in the south, while it is expected to start soon in central and northern provinces.

As of March, remote sensing vegetation indices indicated stressed conditions in parts of the main cereal producing areas of central and northern provinces, reflecting an erratic distribution of rains. Between November 2019 and January 2020, the provinces experienced periods of below-average rainfall, followed by heavy rains in late January and February that triggered localized floods and caused damage to standing crops. The most affected provinces were Cabo Delgado, Manica, Zambezia and Sofala, which were also affected by cyclones in 2019.

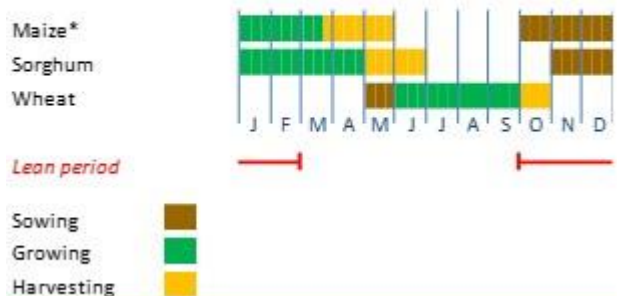
In the southern provinces of Maputo, Gaza and Inhambane, minor cereal producing areas, cumulative rainfall levels between October 2019 and January 2020 were between 30 percent and 50 percent below the long-term average. In February, heavy rains increased soil moisture levels across most of the southern provinces. However, the effects of the early seasonal rain shortages were not reversed, resulting in reduced crop productivity and, in more extreme cases, in permanent crop wilting.

Although reports from the country indicate an increase in the area sown with cereals, the national production in 2020 is likely to remain at levels comparable to the 2019 harvest due to the low yields that reflect the erratic rainfall distribution.

Mozambique

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Mozambique

Cereal Production

	2014-2018 average	2018	2019 estimate	change 2019/2018
	000 tonnes			percent
Maize	1 790	2 496	2 085	-16.5
Rice (paddy)	397	510	350	-31.5
Sorghum	246	295	325	10.0
Others	55	70	79	12.7
Total	2 488	3 372	2 839	-15.8

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Cereal imports estimated slightly above average in 2019/20

Aggregate cereal import requirements in the 2019/20 marketing year (April/March) were estimated at 1.4 million tonnes, an increase compared to the previous year and slightly above the five-year average. The growth in import requirements is the result of a 16 percent reduction in the 2019 cereal output due to the impacts of the two cyclones, which caused a shortfall in domestic supplies. However, a drawdown of existing cereal stocks prevented a larger increase in import needs.

Prices of maize in February 2020 well above year-earlier values

Prices of maize grain increased steadily since mid-2019 and, as of February, they were generally up to twice their year-earlier levels. Price increases were mostly the result of supply pressure as a result of two cyclones on domestic agricultural production.

In some southern districts, reports from the country indicate that prices of maize grain had begun to decline seasonally as the newly harvested crops from the early 2020 harvest had improved market supplies.

Extreme weather events in 2019 worsened food insecurity

According to the latest IPC assessment conducted in June 2019, nearly 1.7 million people were estimated to be food insecure in the October 2019-February 2020 period, more than double the level of the corresponding period in 2018/19. The deterioration in food insecurity mainly reflected the impact of the extreme weather events as well as the increase of food prices.

Although a seasonal improvement in food security is anticipated with the 2020 harvest, reflecting an increase in the availability of staple foods, it is expected to be short-lived in southern provinces on account of a likely second consecutive below-average cereal output. Moreover, the risks posed by the COVID-19 pandemic, both through the negative impacts associated with an economic downturn, largely channelled through income losses and a potential disruption to the food supply chains, is additional concern for food security across the country.

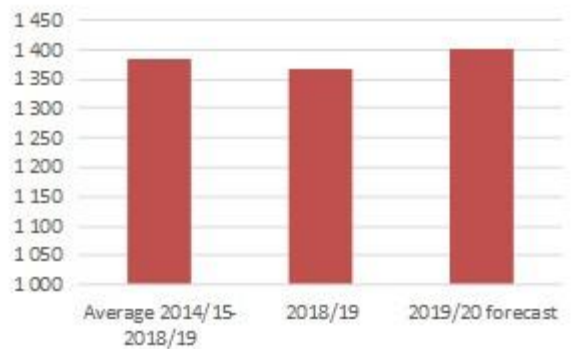
State of emergency declared amid concerns over spread of COVID-19

A high-level emergency was declared in April for a period of one month, as a measure to prevent the spread of the COVID-19 virus. Although the number of confirmed positive cases are limited, as of early April, the Government has implemented measures to restrict international travel and transportation of goods. Mitigating measures for food products are in place, but there are concerns related to the effects on food prices as a result of panic buying, hoarding and potential disruptions to the movement of food supplies. In this regard, the capacity of oversight agencies has been strengthened to monitor market prices.

Mozambique

Cereals Imports

000 tonnes



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Mozambique

White maize retail prices in selected markets

Metical per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

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GIEWS Country Brief Mozambique

Reference Date: 10-December-2019

FOOD SECURITY SNAPSHOT

- Early seasonal weather in main producing areas favours planting of 2020 cereal crops
- Cyclones caused crop losses resulting in production downturn in 2019
- Aggregate cereal import requirements estimated slightly above average in 2019/20
- Prices of maize continued to increase in recent months and were well above year-earlier values
- Food security conditions worsen significantly in 2019, with nearly 2 million people estimated food insecure

Early seasonal weather in main producing areas favours planting of 2020 cereal crops

Planting of the 2020 cereal crops, to be harvested from next April, started in October and it is expected to conclude around the end of December. Precipitation levels have been mostly adequate to facilitate planting activities and support early crop growth in the main producing areas, located in central and northern provinces. In parts of the minor producing southern provinces, rain amounts have been below average and have resulted in drier-than-normal conditions.

The weather outlook for the December 2019-April 2020 period indicates a higher probability of continued below-average rains in southern parts, which could impede normal crop development and may constrain yields. By contrast, in most central and northern regions of the country, where the bulk of the cereal crops are cultivated, increased rainfall amounts are expected during the same period, boosting production prospects.

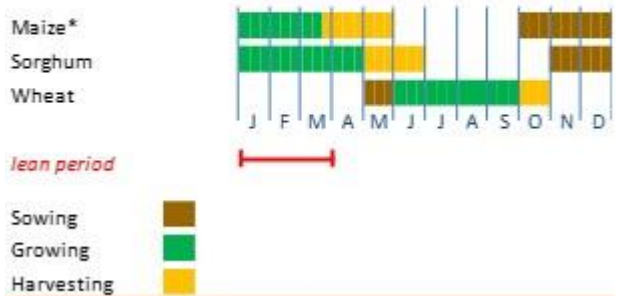
Cyclones caused crop losses resulting in production downturn in 2019

Harvesting of the 2019 main season cereal crops was concluded in July and, based on the results from an FAO/WFP Crop and Food Security Assessment Mission (CFSAM), cereal production is estimated at 2.84 million tonnes (rice in paddy terms). This level is about 16 percent lower than the previous year's bumper output, but still above the average of the previous five years. The year on year production decrease was mainly due to the impact of intense tropical cyclones Idai and Kenneth, which made landfall in March and April, causing extensive losses of standing crops in the highly productive central provinces.

Mozambique

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Mozambique

Cereal Production

	2014-2018 average	2018	2019 estimate	change 2019/2018
	000 tonnes			percent
Maize	1 790	2 496	2 085	-16.5
Rice (paddy)	397	510	350	-31.5
Sorghum	246	295	325	10.0
Others	55	70	79	12.7
Total	2 488	3 372	2 839	-15.8

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Cereal imports expected slightly above average in 2019/20

Aggregate cereal import requirements in the 2019/20 marketing year (April/March) are estimated at 1.4 million tonnes, slightly above the five-year average. The increase in import requirements, following the reduced 2019 output, have been limited by an expected drawdown of existing cereal stocks.

Import requirements of rice and maize in 2019/20 are estimated at an above-average level of 680 000 tonnes and 205 000 tonnes, respectively. By contrast, import requirements of wheat, which is only produced in negligible quantities, are estimated at 575 000 tonnes, 17 percent below the five-year average, mainly reflecting adequate market availabilities from large national stocks due to high volumes imported in the previous year.

Prices of maize continued to rise

Prices of white maize grain continued to rise in October, although to a lesser extent than in the previous two months, and on average were about 50 percent above their year-earlier levels. The higher prices mainly reflect the tight cereal supply situation, due to the impact of extreme weather events on agricultural production. In addition, higher year-on-year prices of maize grains in South Africa, a key supplier for southern provinces, have exerted additional upward pressure.

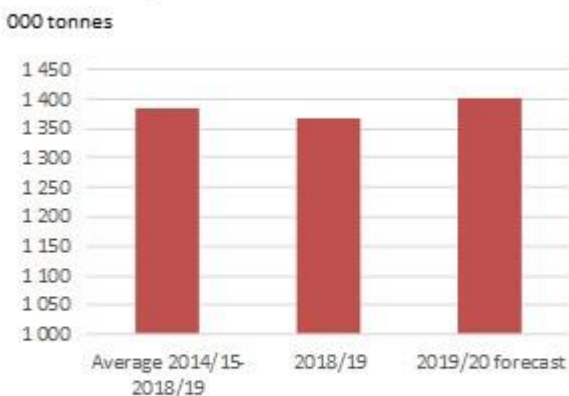
Extreme weather events in 2019 worsen food insecurity

According to the latest Government-led food security evaluation, nearly 2 million people are assessed to be food insecure in the October 2019-February 2020 period, more than double the level of the previous year. The deterioration of the food insecurity conditions mainly reflects the negative impact of the extreme weather events that reduced the agricultural output and disrupted the livelihood systems, as well as triggered food price rises.

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Mozambique

Cereals Imports

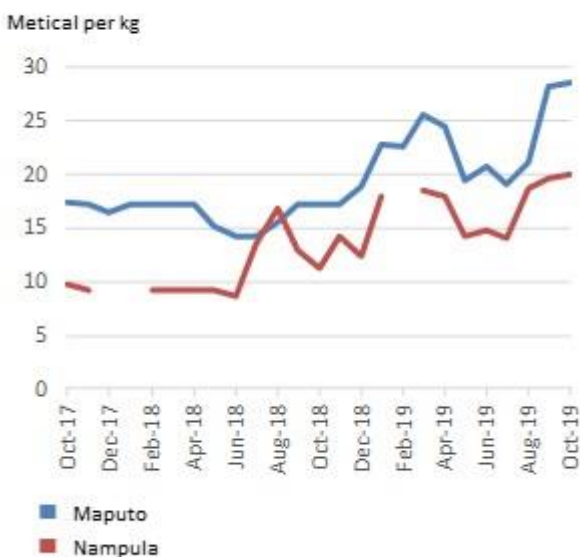


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Mozambique

Retail prices of white maize



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Mozambique

Reference Date: 09-September-2019

FOOD SECURITY SNAPSHOT

- Cereal production declined sharply in 2019 due to extensive crop losses caused by two cyclones that struck key central crop producing areas
- Import requirements for cereals estimated to rise in 2019/20 due to lower harvest
- Prices of maize declined during harvest period, but remained at high levels in several markets
- Food security conditions worsened significantly, with about 1.6 million people estimated to be food insecure

Significant crop losses caused by tropical cyclones Idai and Kenneth result in reduced 2019 cereal harvest

Harvesting of the 2019 main summer season cereal crops was concluded in early July. Based on the results from an FAO/WFP Crop and Food Security Mission (CFSAM), conducted in cooperation with the Government in May, the 2019 cereal production is estimated at 2.85 million tonnes (rice in paddy terms), about 16 percent lower than the previous year's bumper output, but still above the average of the previous five years.

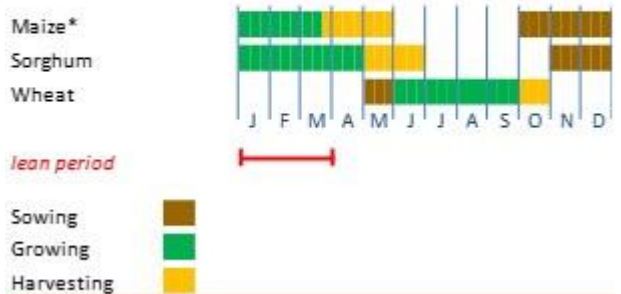
The year on year production decrease is mainly due to the impact of two intense tropical cyclones (Idai and Kenneth), which made landfall in March and April, immediately before the main harvest period. These extreme climatic events caused extensive losses of standing crops in the highly productive central provinces with an estimated 460 000 hectares of crops destroyed in the central provinces of Sofala, Manica and Zambezia. In addition, production losses, but on a smaller scale, occurred in southern provinces due to severe rainfall deficits.

Maize was the most affected crop and accounted for the bulk of losses. Production of maize in 2019 decreased by about 0.4 million tonnes to an estimated 2.1 million tonnes, but it still exceeds the previous five-year average. Paddy production also declined to a below-average level of 350 000 tonnes. By contrast, outputs of sorghum and millet are estimated at above-average levels as both crops are normally planted in higher altitude areas that are less affected by floods and have a greater resilience to water deficits.

Mozambique

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Mozambique

Cereal Production

	2014-2018	2018	2019	change
	average			2019/2018
000 tonnes				
Maize	1 790	2 496	2 085	-16.5
Rice (paddy)	397	510	350	-31.5
Sorghum	246	295	325	10.0
Others	55	70	79	12.7
Total	2 488	3 372	2 839	-15.8

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Cereal import requirements estimated to rise in 2019/20

The lower cereal output resulted in an increase of the national import requirements for maize and rice in the 2019/20 marketing year (April/March). However, national stocks, built up in 2017 and 2018 following two consecutive bumper outputs, are expected to be drawn down in order to compensate for the production decline in 2019 and to limit imports needs.

In total, national cereal import requirements are estimated at 1.48 million tonnes in 2019/20, mostly rice and wheat that is produced in negligible quantities in the country. Maize import requirements are estimated at about 200 000 tonnes in 2019/20, about 30-40 percent more than the previous year and the five-year average. Although in recent years national maize production has been more than sufficient to cover domestic utilization, imports of maize still averaged about 130 000 tonnes annually, mostly reflecting the prohibitive cost of transporting maize from the northern and central surplus producing areas to the structurally deficit southern provinces, which border South Africa, a more competitive market in terms of price.

Prices of maize spiked and remained higher on yearly basis

Prices of maize spiked immediately following the landfall of the cyclones in March and April, as the destruction of infrastructure and stocks disrupted normal trade patterns and resulted in supply shortages. Prices stabilized in May as newly harvested crops augmented market availabilities and eased supply pressure, which eventually resulted in sharp declines in June and July. Maize prices, however, remained higher on a yearly basis as of July in the major markets of Chimoio, Chokwe, Pemba and Nampula, on account of the reduced 2019 output.

Cyclones worsened food insecurity

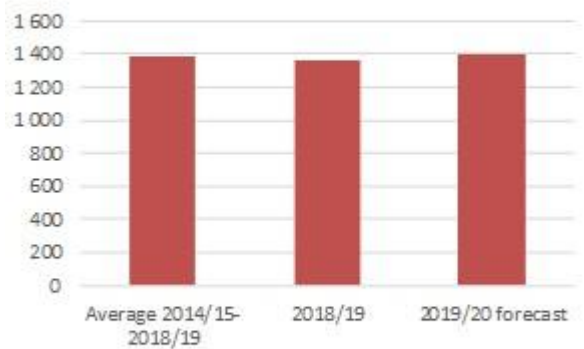
The effects of the cyclones and extreme rainfall deficits, which had a negative impact on agricultural and livelihood systems throughout the country, resulted in an increase in the prevalence and severity of food insecurity, especially for households affected by losses of food crops and livestock. These losses caused a reduction in food supplies from own production and income opportunities from crop sales. According to the latest Integrated Phase Classification (IPC) food security analysis, an estimated 1.6 million people were assessed to be severely food insecure during the period between June and September 2019, nearly double the level of the previous year. The food insecure caseload is expected to increase further to 1.9 million people during the lean season, between October 2019 and February 2020.

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Mozambique

Cereals Imports

000 tonnes



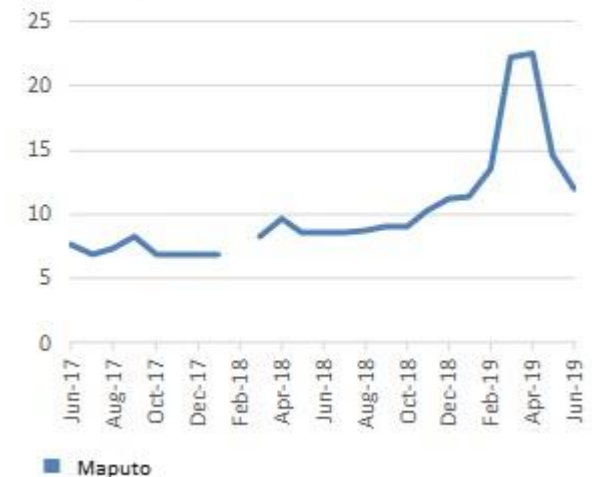
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Mozambique

Retail prices of white maize

Metical per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIIEWS Country Brief Mozambique

Reference Date: 20-March-2019

FOOD SECURITY SNAPSHOT

- Floods in March caused widespread damage to agriculture sector in central provinces
- National cereal production expected to decline in 2019 from last year's above-average level, due to floods in central provinces and dry weather conditions in southern provinces
- Prices of maize higher on yearly basis in early 2019, while flood-induced price spikes expected
- Food insecurity anticipated to worsen in central and southern provinces

Floods resulted in extensive crop losses in central regions

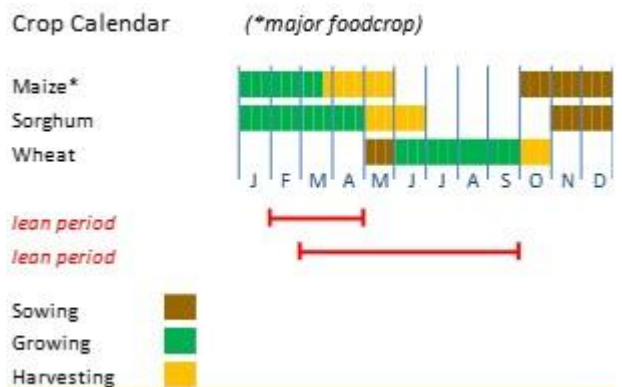
Harvesting of the 2019 main summer season cereal crops is expected to start at the end of March in southern areas and progress further north until the end of June.

In central provinces of Manica, Sofala and Zambezia, as well as some parts of the southern province of Inhambane, the landfall of Cyclone Idai in March and earlier heavy rains associated with the cyclone, resulted in widespread flooding that caused damage to cropped land and infrastructure. Remote sensing data indicates significant areas of flooded land north and west of the coastal city of Beira, where Cyclone Idai made its landfall. Although results from damage assessments are not yet available, crop losses and yield reductions are likely to be extensive in the affected areas. In total, the three central provinces contribute between 40 and 50 percent to the national cereal output; consequently, crop losses could adversely impact both provincial and national cereal supplies.

In northern parts of the country, cumulative rainfall between October 2018 and early March 2019 have been generally favourable. As a result, good yields are expected and cereal production is forecast at an above average level in 2019. In the southern provinces, which are minor cereal-producing areas, despite mostly favourable weather conditions in coastal areas, drier and hotter weather conditions in the interior are likely to keep cereal harvests at average to below average levels.

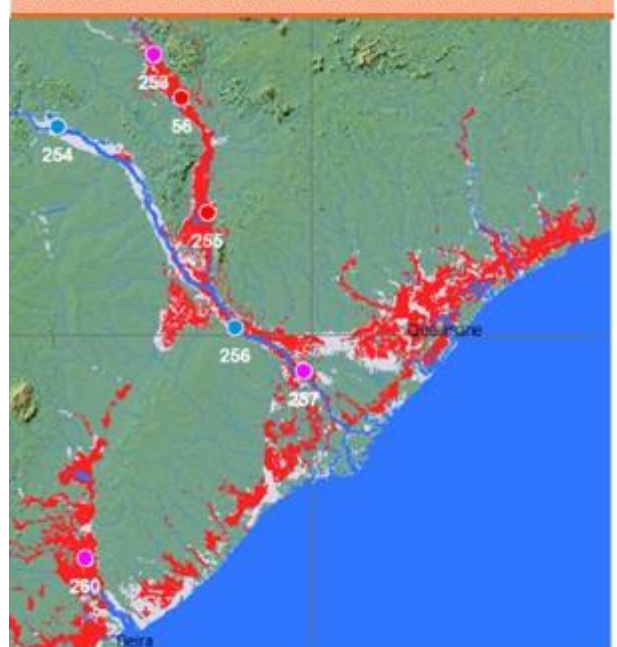
At the national level, in consideration of the flood damage in central provinces and dry weather conditions in some southern parts, maize production is expected to decline in 2019 from last year's above-average output. Good harvests in the north,

Mozambique



Source: FAO/GIEWS, FEWSNET.

Mozambique - Flooded areas in Sofala and Zambezia provinces



Note: Red indicates areas that had flooded as of 19 March.

Source: Dartmouth Flood Observatory, University of Colorado.

however, are expected to compensate for some production losses and prevent a larger decline in domestic output.

Cereal import requirements forecast to rise in 2019/20

The foreseen reduction in 2019 maize output is expected to result in a drawdown in stocks and an increase in import requirements to an above average level in the 2019/20 marketing year (April/March). On average, the country imports about 100 000 tonnes of maize per year, generally destined to the deficit producing provinces in the south, while outputs in central and northern provinces are usually sufficient to cover local requirements.

In addition, the country imports more than 1 million tonnes of wheat and rice annually. While maize imports are normally accessed by land from South Africa, a large proportion of the wheat and rice imports are shipped to Beira Port, located in the central province of Sofala. Cyclone damage to the Port's infrastructure and storage facilities could impede and delay the importation of cereals, with implications on supply and prices.

Prices of maize higher on yearly basis

The impact of the floods is expected to result in price spikes of food commodities in central provinces as infrastructure damage is likely to hinder the movement of goods and impede normal market functions, causing supply deficits.

Before the impact of the floods, prices of maize, the main food staple, had been rising seasonally. As of February 2019, maize grain prices were well above their year values across most of the country.

Floods expected to worsen food insecurity

The recent large-scale floods have caused the loss of lives and affected more than 600 000 people. Most likely, this preliminary number will rise following on-ground assessments. The impact of the floods are expected to result in an increased prevalence and severity of food insecurity in central provinces, especially for households that have lost their food crops and livestock, which in turn would reduce both their food supplies and income opportunities from crop sales. While the immediate humanitarian interventions are focused on search and rescue, the provision of shelter and the delivery of food aid, following the recession of floodwaters, interventions to support agricultural households would be required in order to restore their productive capacities, in consideration of likely losses of productive assets and agricultural equipment. Forecasts of heavy rains in the last week of March could result in more damage and losses.

Food insecurity is also likely to increase in southern parts affected by dry weather conditions due to foreseen production shortfalls, while the higher year-on-year prices of maize are likely to constrain food access. In northern regions, food security conditions are anticipated to remain stable, reflecting a forecast increase in crop production.

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Mozambique

Cereal Production

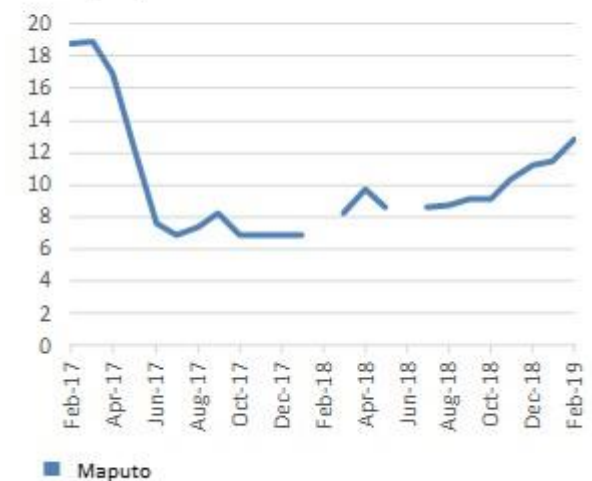
	2013-2017	2017	2018	change
	average		estimate	2018/2017
000 tonnes				
Maize	1 716	2 346	2 449	4.4
Rice (paddy)	363	402	413	2.6
Sorghum	225	250	263	5.2
Others	51	52	46	-11.0
Total	2 355	3 050	3 171	4.0

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheet.

Mozambique

Retail prices of white maize

Metical per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIIEWS Country Brief Mozambique

Reference Date: 20-March-2019

FOOD SECURITY SNAPSHOT

- Floods in March caused widespread damage to agriculture sector in central provinces
- National cereal production expected to decline in 2019 from last year's above-average level, due to floods in central provinces and dry weather conditions in southern provinces
- Prices of maize higher on yearly basis in early 2019, while flood-induced price spikes expected
- Food insecurity anticipated to worsen in central and southern provinces

Floods resulted in extensive crop losses in central regions

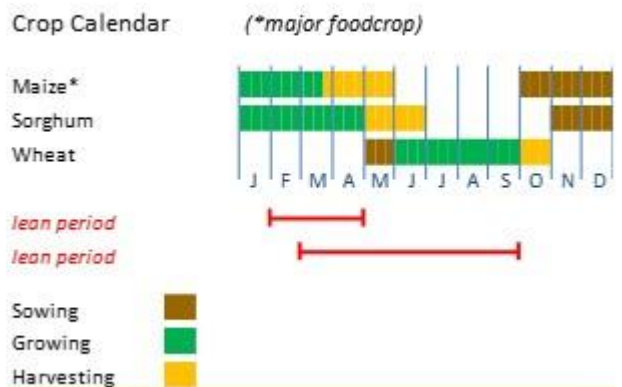
Harvesting of the 2019 main summer season cereal crops is expected to start at the end of March in southern areas and progress further north until the end of June.

In central provinces of Manica, Sofala and Zambezia, as well as some parts of the southern province of Inhambane, the landfall of Cyclone Idai in March and earlier heavy rains associated with the cyclone, resulted in widespread flooding that caused damage to cropped land and infrastructure. Remote sensing data indicates significant areas of flooded land north and west of the coastal city of Beira, where Cyclone Idai made its landfall. Although results from damage assessments are not yet available, crop losses and yield reductions are likely to be extensive in the affected areas. In total, the three central provinces contribute between 40 and 50 percent to the national cereal output; consequently, crop losses could adversely impact both provincial and national cereal supplies.

In northern parts of the country, cumulative rainfall between October 2018 and early March 2019 have been generally favourable. As a result, good yields are expected and cereal production is forecast at an above average level in 2019. In the southern provinces, which are minor cereal-producing areas, despite mostly favourable weather conditions in coastal areas, drier and hotter weather conditions in the interior are likely to keep cereal harvests at average to below average levels.

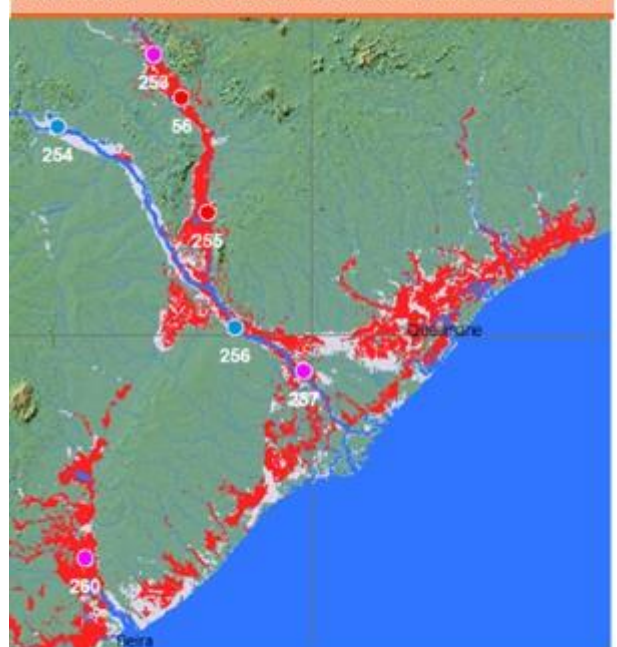
At the national level, in consideration of the flood damage in central provinces and dry weather conditions in some southern parts, maize production is expected to decline in 2019 from last year's above-average output. Good harvests in the north,

Mozambique



Source: FAO/GIEWS, FEWSNET.

Mozambique - Flooded areas in Sofala and Zambezia provinces



Note: Red indicates areas that had flooded as of 19 March.

Source: Dartmouth Flood Observatory, University of Colorado.

however, are expected to compensate for some production losses and prevent a larger decline in domestic output.

Cereal import requirements forecast to rise in 2019/20

The foreseen reduction in 2019 maize output is expected to result in a drawdown in stocks and an increase in import requirements to an above average level in the 2019/20 marketing year (April/March). On average, the country imports about 100 000 tonnes of maize per year, generally destined to the deficit producing provinces in the south, while outputs in central and northern provinces are usually sufficient to cover local requirements.

In addition, the country imports more than 1 million tonnes of wheat and rice annually. While maize imports are normally accessed by land from South Africa, a large proportion of the wheat and rice imports are shipped to Beira Port, located in the central province of Sofala. Cyclone damage to the Port's infrastructure and storage facilities could impede and delay the importation of cereals, with implications on supply and prices.

Prices of maize higher on yearly basis

The impact of the floods is expected to result in price spikes of food commodities in central provinces as infrastructure damage is likely to hinder the movement of goods and impede normal market functions, causing supply deficits.

Before the impact of the floods, prices of maize, the main food staple, had been rising seasonally. As of February 2019, maize grain prices were well above their year values across most of the country.

Floods expected to worsen food insecurity

The recent large-scale floods have caused the loss of lives and affected more than 600 000 people. Most likely, this preliminary number will rise following on-ground assessments. The impact of the floods are expected to result in an increased prevalence and severity of food insecurity in central provinces, especially for households that have lost their food crops and livestock, which in turn would reduce both their food supplies and income opportunities from crop sales. While the immediate humanitarian interventions are focused on search and rescue, the provision of shelter and the delivery of food aid, following the recession of floodwaters, interventions to support agricultural households would be required in order to restore their productive capacities, in consideration of likely losses of productive assets and agricultural equipment. Forecasts of heavy rains in the last week of March could result in more damage and losses.

Food insecurity is also likely to increase in southern parts affected by dry weather conditions due to foreseen production shortfalls, while the higher year-on-year prices of maize are likely to constrain food access. In northern regions, food security conditions are anticipated to remain stable, reflecting a forecast increase in crop production.

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Mozambique

Cereal Production

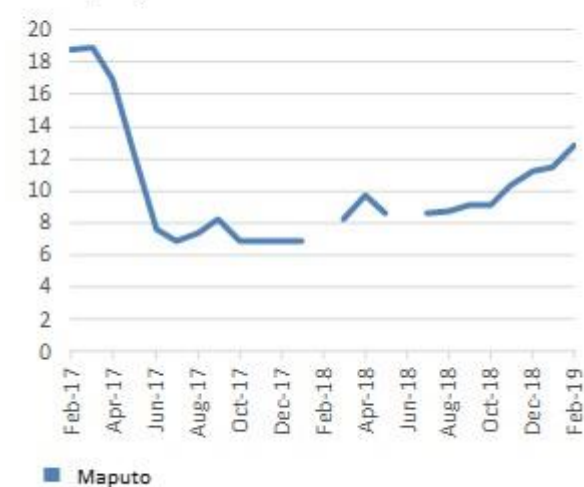
	2013-2017	2017	2018	change
	average		estimate	2018/2017
000 tonnes				
Maize	1 716	2 346	2 449	4.4
Rice (paddy)	363	402	413	2.6
Sorghum	225	250	263	5.2
Others	51	52	46	-11.0
Total	2 355	3 050	3 171	4.0

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheet.

Mozambique

Retail prices of white maize

Metical per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GLEWS Country Brief Mozambique

Reference Date: 20-June-2018

FOOD SECURITY SNAPSHOT

- Maize production in 2018 forecast at above-average level, but set to decline on yearly basis reflecting dry weather conditions in southern and central parts
- National maize supplies forecast to be generally adequate in 2018/19 marketing year (April/March) on account of larger opening stocks and above-average output
- Prices of maize remained mostly stable in 2018 and lower on yearly basis
- Impact of dry weather on crop production expected to aggravate food security conditions in southern Gaza and Inhambane provinces

Dry weather expected to cause decline in cereal production, but 2018 output still set to remain above average

Harvesting of the 2018 main summer season cereal crops is expected to conclude in late June.

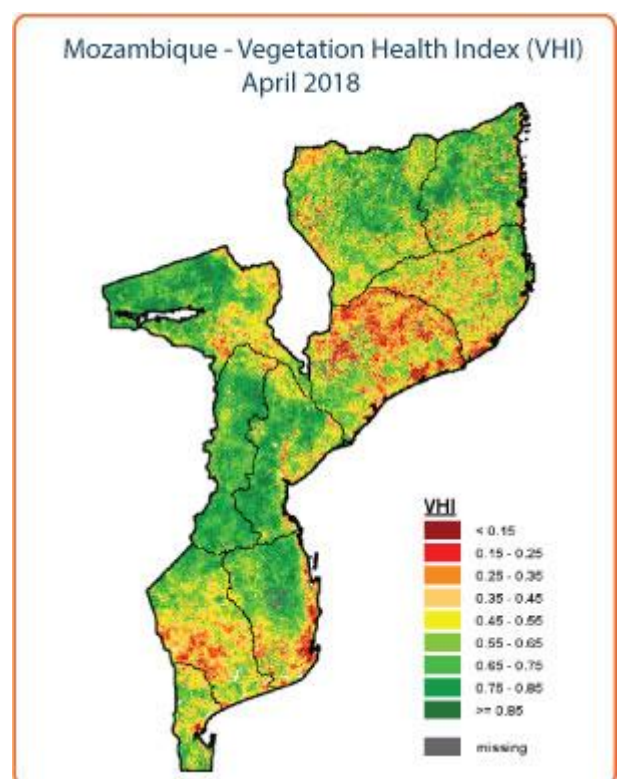
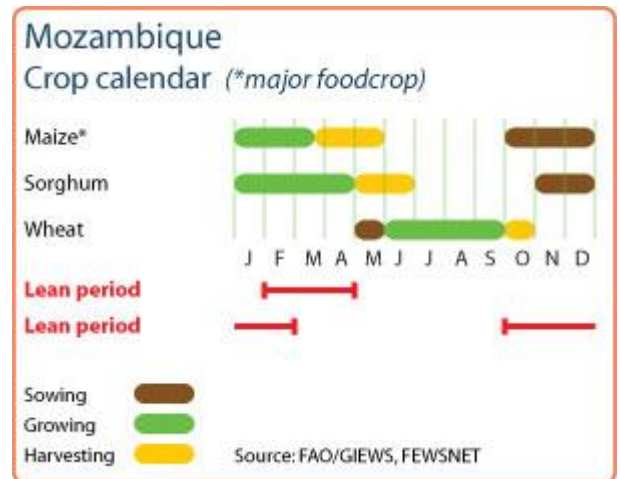
Weather conditions during the cropping season have been mixed. Between November 2017 and April 2018, cumulative seasonal rains have been well below average in southern provinces of Gaza and Inhambane, particularly in the interior districts. By contrast, in central and northern provinces, despite a period of lower-than-normal rains in January, precipitation has been generally favourable. However, a combination of dry periods and heavy downpours in areas of the north and centre during the first quarter of 2018 resulted in some crop losses.

Fall Armyworm (FAW) infestations are likely to have caused damage to the maize crop, particularly as adequate control measures are too costly for small-scale farmers. However, the overall impact of FAW on national cereal production is likely to be small.

Mostly reflecting dry weather-reduced yields, total cereal production in 2018 is foreseen to decrease year-on-year, but remain above the previous five-year average.

Maize import requirements forecast to rise

The above-average maize output in 2017 enabled the country to build up its stocks in the 2017/18 marketing year (April/March). As a result, opening stocks in 2018/19 are estimated to be up by



200 000 tonnes on a yearly basis, bolstering domestic availabilities.

However, import needs in 2018/19 are forecast to increase slightly on a yearly basis to a near-average level, mostly reflecting the foreseen production shortfalls in southern areas. The country normally imports around 100 000 tonnes of maize from South Africa; these imports mostly satisfy the consumption needs in the south, given its close proximity to South Africa compared to the main cereal-producing provinces in the north.

Maize prices remained broadly stable and lower on yearly basis

Prices of maize grain have remained broadly stable since mid-2017 and were well below their year-earlier levels as of May 2018. This situation largely reflects the good national supplies, while lower grain prices in South Africa and a generally stable exchange rate have also helped to temper inflationary pressure in 2018.

Prices of maize are expected to remain under downward pressure for the next months as new supplies from the 2018 harvest boost market availabilities.

Food security expected to worsen in southern provinces

Food security conditions in the interior districts of Gaza and Inhambane are expected to worsen in 2018 on account of the anticipated production decreases. Although most households in these areas are normally able to engage in a second season harvest, the poor summer seasonal rains have reduced water supplies and, consequently, lowered production prospects for secondary season crops. Similarly, conditions are likely to be stressed in northern and central parts that experienced crop losses due to the dry periods and heavy rainfall.

The generally lower year-on-year cereal prices are, however, aiding households' access to food and preventing a further deterioration of conditions.

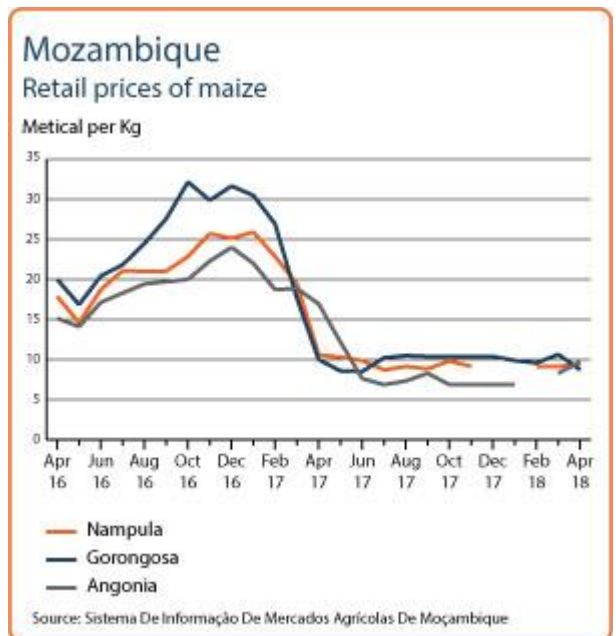
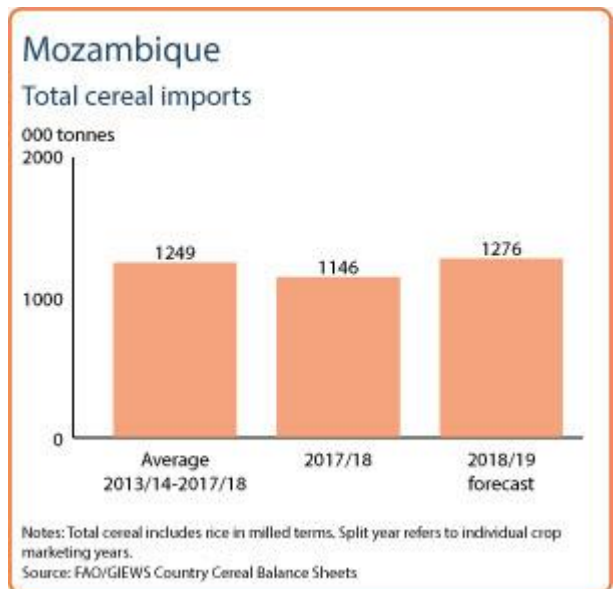
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Mozambique

Cereal production

	2013-2017 average	2017	2018 forecast	change 2018/2017
	000 tonnes			percent
Maize	1 716	2 346	2 100	-10
Rice (paddy)	363	402	390	-3
Sorghum	225	250	215	-14
Others	51	52	48	-8
Total	2 355	3 050	2 753	-10

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



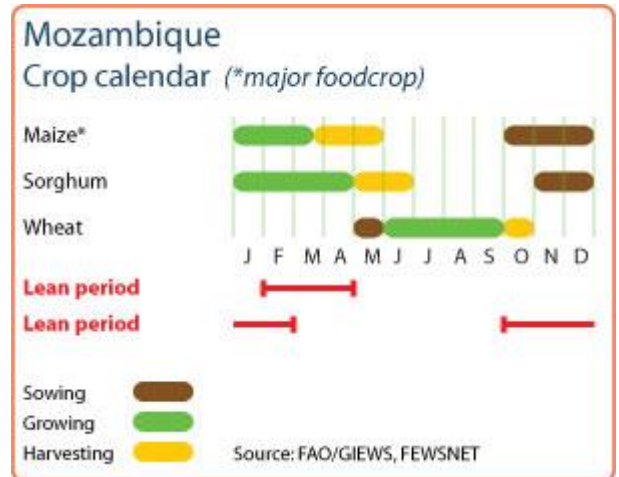


GIEWS Country Brief Mozambique

Reference Date: 30-June-2017

FOOD SECURITY SNAPSHOT

- National cereal production in 2017 forecast at above-average levels, mainly as a result of generally favourable seasonal rains
- Maize prices declined on expectations of improved output in 2017, while strengthening of national currency also eased inflationary pressure
- Food insecurity peaked in early 2017 following impact of 2016 drought and situation was further compounded by passing of Cyclone Dineo in February 2017. Conditions expected to improve in 2017/18 given lower food prices and good prospects for 2017 cereal production



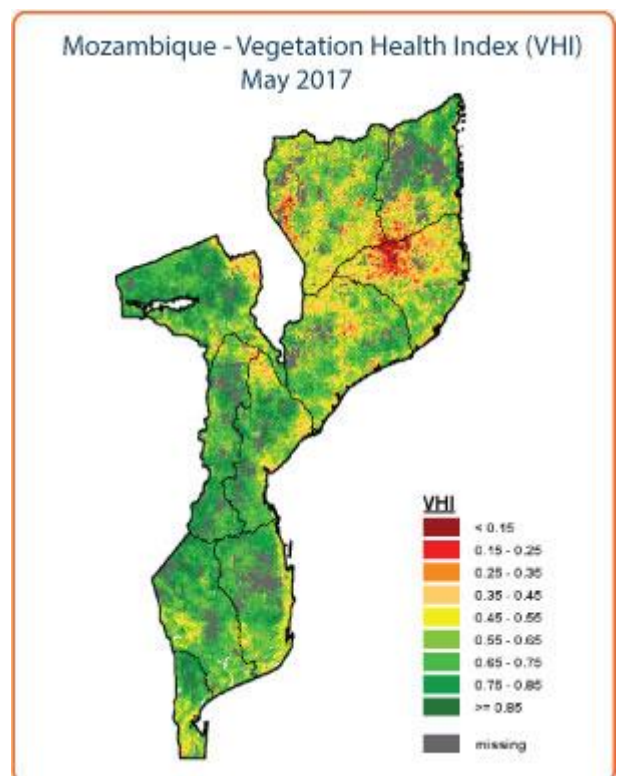
Cereal production expected to increase in 2017

Harvesting of the 2017 summer main cereal crops is expected to conclude soon, with the minor secondary season crops, including the wheat crop, to be harvested in the last quarter of the year. Official production estimates have not yet been released, but provisional forecasts indicate a year-on-year production gain, mostly stemming from a larger maize output. This year's increase would largely be on account of improved seasonal rains, which are expected to boost yields compared to the dry weather-reduced levels in 2016. Although the overall national output is anticipated at a higher level in 2017, some production declines are expected in localized areas of the south and centre, due to floods caused by Cyclone Dineo in February with loss of nearly 30 000 hectares of crops in Inhambane Province. Drier weather conditions in some northern areas, in particular in parts of Nampula Province, retarded vegetation growth with likely negative effects on yields, dampening production levels.

The country was also affected by an outbreak of Fall armyworms, which reportedly spread to all provinces except Cabo Delgado in the north. Although the impact on production has not been quantified, the effect is expected to be limited, partly owing to the heavy rains that repressed the pest's impact on crop production.

Imports expected to decline moderately in 2017/18

On account of the improved output this year, maize imports in the 2017/18 marketing year (April/March) are expected to decline moderately. However, the current lower prices of maize in South Africa, a key trading partner, and the recent strengthening of the



national currency, might encourage increased levels of imports during the first half of the marketing year. Regarding other cereals, the country remains a net importer of rice and wheat, and imports of both commodities are expected to remain almost unchanged compared to the previous year's levels.

Maize prices decline on expectations of improved domestic supplies

Prices of maize declined in recent months on harvest pressure and in May they were generally well below their year-earlier levels. The lower year-on-year prices are generally the result of improved supply prospects, while the strengthening of the national currency in 2017 also eased inflationary pressure.

Food security conditions expected to improve in 2017/18

Overall, food security conditions are expected to improve in 2017/18, on account of the larger agricultural output and lower cereal prices. A country-wide Government-led food security assessment will be conducted in July and the results are expected to be available in August providing estimates of the number of food insecure people.

During the start of the year, approximately 900 000 people were provided with food assistance, out of an estimated 2.1 million assessed to be food insecure in 2016/17 mainly due to the impact of the El Niño-induced drought on agricultural production. In addition, the passing of Cyclone Dineo earlier in the year affected about 0.55 million people and further aggravated the food security conditions in southern provinces.

Mozambique

Cereal production

	2012-2016 average	2016	2017 forecast	change 2017/2016
	000 tonnes			percent
Maize	1,483	1,794	2,000	11
Rice (paddy)	352	333	360	8
Sorghum	212	240	260	8
Others	48	52	50	-4
Total	2,094	2,419	2,670	10

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



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GIEWS Country Brief Mozambique

Reference Date: 15-March-2017

FOOD SECURITY SNAPSHOT

- National cereal production in 2017 forecast to increase moderately, on account of wetter conditions, but localized production decreases expected in areas affected by dry spells and floods
- Maize prices remained high, but declined in recent month in anticipation of 2017 harvest
- Food insecurity peaked in early 2017 following impact of 2016 drought, while effect of Cyclone Dineo in February 2017 heightened food assistance requirements in southern parts

Cereal production expected to increase in 2017

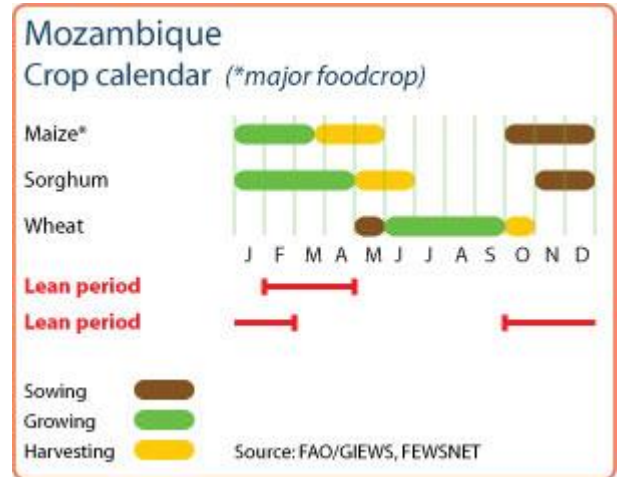
Harvesting of the 2017 cereal crops is expected to begin soon in southern provinces and gradually progress further north. Production prospects at the national level are overall favourable, mostly owing to the wetter conditions this season that are expected to boost yields compared to the dry weather-reduced levels in 2016. However, flooding in southern and central parts, as well as dry weather in the north, which mostly affected coastal areas in Cabo Delgado, are expected to constrain outputs in these parts.

In the south, the passing of Cyclone Dineo in February resulted in the loss of an estimated 29 173 hectares of crops in Inhambane Province, while in addition nearly 136 000 cashew and coconut trees, an important source of income for farming households, were destroyed. In the large maize-producing northern provinces of Cabo Delgado and Nampula, cumulative rainfall levels between October 2016 and February 2017 were below average. Although the rainfall deficits are not expected to result in significant crop losses, the reduced seasonal precipitation is likely to constrain yields.

Overall, national cereal production is expected to increase this year, with lower harvests likely in the areas affected by floods and dry spells.

Cereal import requirements increase, following lower 2016 harvest

The modest decrease in the 2016 cereal output, mainly on account of lower maize and rice harvests, resulted in a small increase in the import requirement for the 2016/17 marketing year (April/March), with an estimated drawdown in stocks also



Mozambique Cereal production

	2011-2015 average	2015	2016 estimate	change 2016/2015
	000 tonnes			percent
Maize	1 559	1 877	1 794	-4
Rice (paddy)	339	357	328	-8
Sorghum	246	222	240	8
Others	51	55	52	-5
Total	2 195	2 511	2 414	-4

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

helping to compensate for the reduced domestic output. Despite larger external requirements, the monthly import rate of maize grain from South Africa, the main source of cereals, has been lower than the previous year. This mostly reflects the sharp depreciation of the national currency (metical) against the South Africa rand in 2016, which pushed up import costs. By early 2017, the currency had stabilized, prompting an increase in the monthly import rate.

Tighter cereal supplies and currency depreciation sustains higher prices

Despite moderate price declines in most markets in January and February 2017 in anticipation of the harvest, the overall tighter domestic maize supply situation and inflationary pressure from the currency depreciation has contributed to sustaining generally higher year-on-year maize prices. Furthermore, prices spiked in the southern market of Chokwe to nearly double their year earlier values as of February 2017, due to the impact of Cyclone Dineo, which destroyed crops and infrastructure, causing temporary food supply shortfalls. The national year-on-year inflation rate stood at 21 percent in February 2017.

Food security conditions expected to improve in 2017

A Government-led assessment at the end of 2016 estimated that approximately 2 million people are in need of food assistance until the start of the main harvest, with the impact of Cyclone Dineo inflating the figure by 89 000 for Inhambane Province.

The impact of the previous year's drought on 2016 food production, and consequently households' food supplies, was the main driver of intensified food insecurity conditions in 2016/17. The most affected provinces are Gaza, Inhambane, Sofala, Tete and Zambezia, where the recent assessment found that over 15 percent of the population have poor food consumption levels. Cyclone Dineo, which affected about 0.55 million people, aggravated food security conditions further and the impact on the 2017 harvest in the affected districts of Inhambane Province is expected to prolong stressed conditions in these areas; the United Nations in Mozambique, in support of the Government, released a Flash Appeal, requesting USD 3.31 million to provide food assistance to 89 000 people, while nearly 18 000 households who lost crops are earmarked to receive seed assistance. In addition, conflicts in localized parts of the centre between the Government and an armed opposition group, Renamo, resulted in displacements and impeded humanitarian access. However, an agreed ceasefire in January 2017 has now improved access for humanitarian agencies.

At the national level, food security conditions are expected to improve from April, as households access new supplies from the 2017 harvest, while the recent decrease in maize prices has eased food access constraints.



GIEWS Country Brief Mozambique

Reference Date: 15-November-2016

FOOD SECURITY SNAPSHOT

- Cereal production in 2016 estimated 4 percent down from previous year, but still remains above average, reflecting negative impact of El Niño-associated drought
- Tighter cereal supplies and depreciation of Mozambican metical puts strong upward pressure on food prices
- Food security worsens significantly in 2016 on account of reduced harvest and higher food prices, further exacerbated in some central provinces due to localized conflict

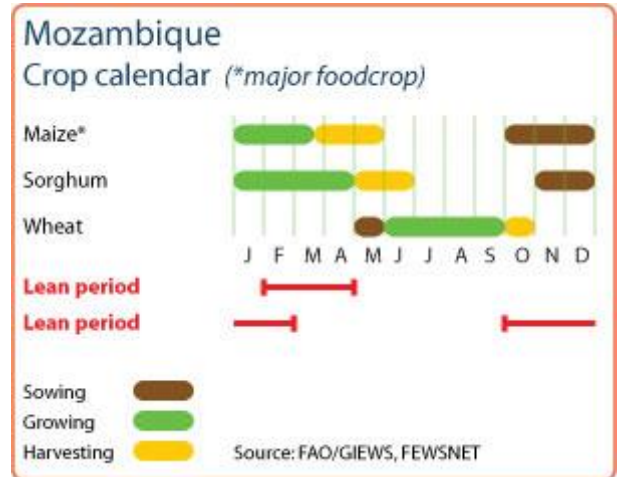
Favourable rains forecast for 2016/17 cropping season

Sowing of the 2017 cereal crops is underway in southern and central parts, and planting activities will progress further north as seasonal rains arrive. Rainfall forecasts for much of the 2016/17 main summer cropping season (October-June) indicate an increased likelihood of average to above-average rainfall; this follows a season that was mainly characterized by severe dry conditions in the south and centre. Although the current season has just commenced, the weather forecast points to generally favourable production prospects; however, the reduced 2016 harvest is expected to constrain the productive capacity of low-income households' that are normally reliant on their own seed supplies and this may therefore limit the area planted. In response, FAO and the Government are providing input support to the affected households.

El Niño-induced dry conditions result in cereal production decline in 2016

Total cereal production in 2016 is estimated at about 2.4 million tonnes, about 4 percent below the previous year's output, but above the preceding five-year average. Maize production, which constitutes the bulk of the country's cereal output, decreased by 4 percent and rice production fell by 8 percent, while the sorghum crop, which is more resistant to drier conditions compared to maize, increased by 8 percent on a yearly basis in 2016.

The production decline mainly reflects reduced harvests in southern and central areas that were affected by the prolonged El Niño-induced dry conditions. An estimated 0.86 million hectares of cropped land (about 18 percent of the total planted areas) were affected by the dryness in the main cereal-producing



Mozambique
Cereal production

	2011-2015 average	2015	2016 estimate	change 2016/2015
	000 tonnes		percent	
Maize	1 559	1 877	1 794	-4
Rice (paddy)	339	357	328	-8
Sorghum	246	222	240	8
Others	51	55	52	-5
Total	2 195	2 511	2 414	-4

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

provinces of Sofala, Tete (centre) and minor-producing provinces of Inhambane, Gaza and Maputo (south), with many households forced to replant several times. Average to good harvests were estimated in northern provinces, which partly compensated for reduced outputs further south and averted a steeper production decline at the national level.

Drought impact and tighter cereal supplies boost inflation

Tighter domestic maize supplies has put upward pressure on prices, with most markets recording grain prices well above their year-earlier levels. Inflationary pressure stemming from the depreciation of the national currency (metical) against the US dollar also boosted price increases, with the national year-on-year inflation rate standing at 25.5 percent as of October 2016. Moreover, an increase in the cost of fuel in October, following the first upward revision of fuel prices by the Government since 2011, is expected to contribute to sustaining inflationary pressure.

Food security conditions deteriorate sharply

The reduced harvest in southern and central areas and higher food prices, have resulted in severely stressed food security conditions. A Government-led assessment estimated that close to 2 million people are in need of humanitarian assistance and this figure is likely to rise in the first quarter of 2017 if the immediate requirements are not satisfied. The assessment found that the majority of households that were surveyed did not have cereal stocks for consumption and, due to frequent replanting, have low seed supplies that might adversely affect their productive capacity for the subsequent 2017 main season. In addition, an Integrated Food Security Phase Classification (IPC) assessment in August estimated high levels of acute malnutrition in the Sofala and Zambezia provinces, while the situation is critical in Cabo Delgado. A further stress on the food security situation relates to the localized conflict in Manica and Sofala provinces between Government forces and the armed wing of the opposition party (Renamo), which has resulted in the displacement of up to 80 000 people.

The Government and humanitarian community are responding to the current situation, providing agricultural support for livestock and horticulture production and food assistance to the most vulnerable households.

Reference Date: 25-April-2016

FOOD SECURITY SNAPSHOT

- Cereal production in 2016 forecast to remain below average on account of poor rains in southern and central provinces associated with El Niño
- Maize prices rise significantly, mostly due to impact of regional drought, with the depreciation of Metical exacerbating upward trend
- Food security conditions worsen in southern and central provinces

Reduced 2016 cereal production expected in central and southern regions

Harvesting of the 2016 main season crops is underway and is expected to conclude in June. This year's cereal production is preliminarily forecast at below average levels, mostly reflecting delayed and suppressed seasonal rains across southern and central provinces, which caused severely stressed crop conditions. An estimated 0.52 million hectares of crops (about 12 percent of the total planted areas) were lost due to the dry conditions in the main cereal-producing provinces of Sofala, Tete (centre) and minor-producing provinces of Inhambane, Gaza and Maputo (south), with many households forced to replant several times. In response, the Government activated an institutional red alert in the drought-affected areas to expand interventions and boost the response's funds. By contrast, generally good rains in the large-producing northern provinces benefitted crop development, with vegetation indexes pointing to overall favourable conditions. As a result, average to good harvests are expected in the north, which could partly compensate for reduced outputs in the south and parts of the centre.

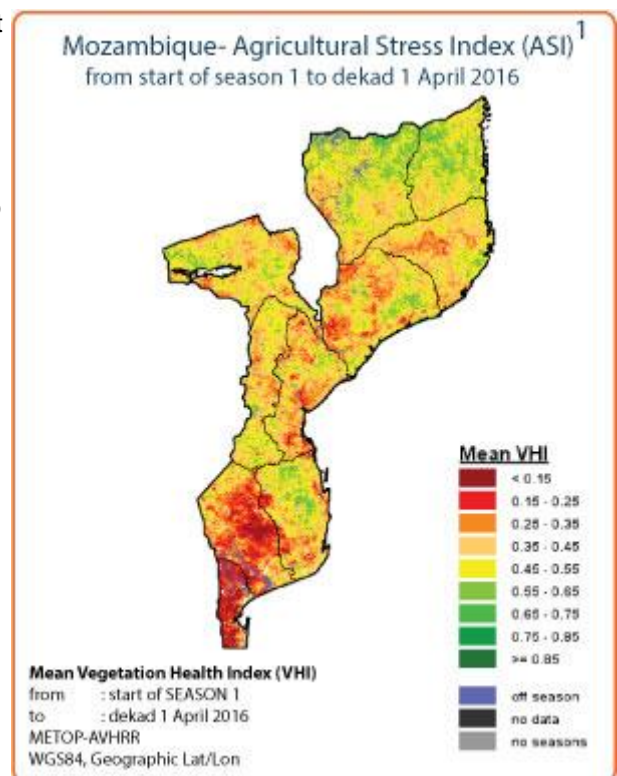
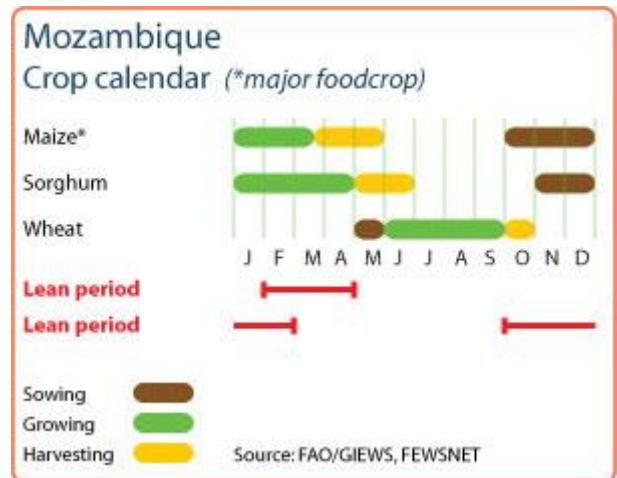
Furthermore, improved late seasonal rains in March and April in central areas, while unlikely to result in significant improvement to the main season crops, are expected to benefit pastures and create more conducive conditions for the minor secondary season crops (to be harvested from August), compared with early forecasts. Secondary season production is mainly practiced in low-lying regions, where residual moisture is available, and with irrigation facilities.

Prices of maize driven higher by impact of regional drought

Maize prices are well above their year-earlier levels, mostly driven by the drought-reduced national and regional production prospects and the depreciation of the Metical against the US dollar and, recently, against the South African rand. The expected poor 2016 cereal outputs in the south and parts of the centre, as well as the high maize prices in South Africa, which add to imported inflation, are expected to maintain upward pressure, following an easing of prices immediately after the harvest period.

Drought conditions worsen food security

The expected poor harvests in the south and some central areas are expected to result in stressed food security conditions throughout 2016/17. A Government-led assessment in five of the most affected



Mozambique Cereal production

	2010-2014 average	2014	2015 estimate	change 2015/2014
	000 tonnes			percent
Maize	1,602	1,357	1,350	-1
Rice (paddy)	319	383	357	-7
Sorghum	279	225	215	-4
Others	52	48	45	-6
Total	2,252	2,013	1,967	-2

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

provinces (Tete, Manica, Sofala, Inhambane, Gaza and Maputo) and also including data from Zambezia Province, estimated that 1.5 million people are currently in need of humanitarian assistance. The assessment found that the majority of households that were surveyed did not have cereal stocks for consumption and, due to frequent replanting, have low seed supplies that might adversely affect their productive capacity for the secondary season and the subsequent 2017 main season. The Government and humanitarian community are responding to the current situation, providing agricultural support for livestock and horticulture production and food assistance to the most vulnerable households.

Reference Date: 10-February-2016

FOOD SECURITY SNAPSHOT

- **Below-average seasonal rains reduce 2016 production prospects, with particularly poor crop conditions in southern parts**
- **Tight maize supply situation expected to continue in 2016/17 marketing year**
- **Maize prices at end-December 2015 were well above their year earlier levels**
- **Food security conditions expected to worsen in 2016 due to impact of El Niño-associated dry conditions**

Prospects for 2016 cereal crop are poor in central and southern regions

Rains since the start of the 2015/16 cropping season (October/June) have generally been below average in southern and central provinces, while more favourable rains were received in northern areas benefiting crop development. Although the increased precipitation during December 2015 and January 2016 partly alleviated seasonal dryness in the south and centre, large portions of the country still only received less than 50 percent of the average rainfall between October 2015 and January 2016, with the El Niño episode continuing to adversely impact the monsoon season. As a result, vegetation conditions are generally below average, particularly in southern Gaza province, implying an increased likelihood of reduced cereal yields for the 2016 crop.

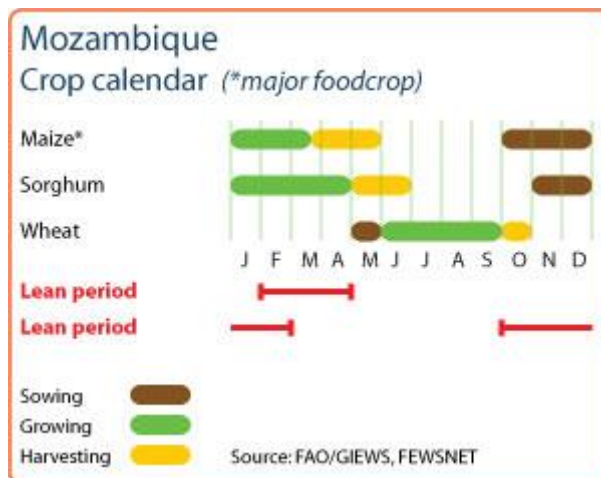
Weather forecasts point to a continuation of similar rainfall patterns for the remainder of the season, with a higher chance of reduced rains in the centre and south, while near-normal rainfall is expected in northern provinces. Overall, the 2016 cereal output is anticipated to remain at a below-average level for a second consecutive year, with particularly poor harvests anticipated in southern areas.

Tight cereal supply situation expected to continue in 2016/17

The current unfavourable production outlook follows an already reduced 2015 cereal harvest, which resulted in a small increase to the maize import requirement for the almost concluded 2015/16 marketing year (April/March). In consideration of an expected second successive below-average maize harvest in 2016, import requirements in the 2016/17 marketing year are forecast to remain at similarly higher levels.

Prices of maize were well above their year-earlier levels

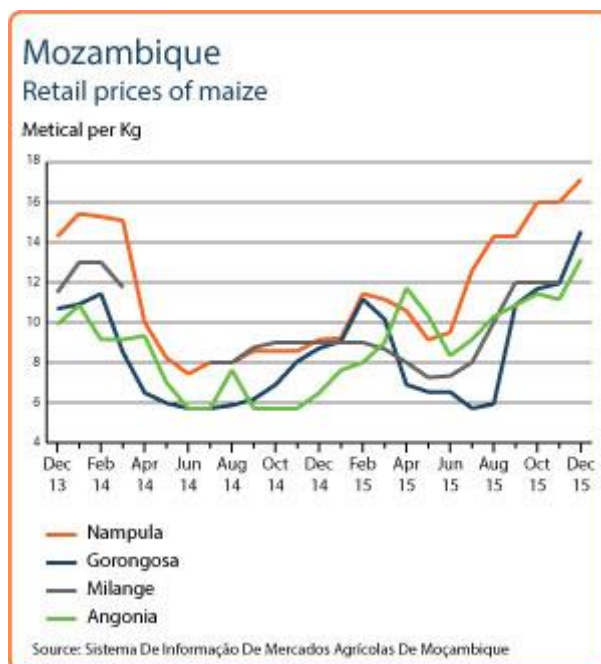
Prices of maize generally increased seasonally in the last quarter of 2015 and, as of early December, were up to double their year-earlier values. The elevated levels in 2015 largely reflect the tighter supply situation following the below-average 2015 harvest. The relative stability of the Metical (national currency) against the South Africa Rand, however, has helped to somewhat limit imported inflation, particularly given the record high maize prices in South Africa.



Mozambique Cereal production

	2010-2014 average	2014	2015 estimate	change 2015/2014
	000 tonnes			percent
Maize	1,882	1,900	1,800	-5
Rice (paddy)	319	383	365	-5
Sorghum	279	225	215	-4
Others	52	48	45	-6
Total	2,532	2,556	2,425	-5

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Food security conditions expected to worsen due to impact of dry conditions

The impact of the current El Niño-associated dry conditions is expected to result in a deterioration of food security conditions in 2016/17, due to reduced harvests and limited availability of seasonal farm labour opportunities, particularly in southern provinces. The higher maize prices are also negatively impacting on food access. The current food insecure population requiring assistance is estimated at 176 139 persons.

Reference Date: 28-January-2015

FOOD SECURITY SNAPSHOT

- Heavy rains in January caused flooding in central provinces, negatively impacting on crops and food security conditions
- Floods followed a period of below-average rains in October and November 2014 that delayed planting of 2015 cereal crop, to be harvested from March/April 2015
- Overall national maize supplies are favourable, on account of 2014 production rebound
- Reflecting good supplies, maize prices are below last year's levels, but have increased seasonally in recent months
- Emergency food assistance is required for households affected by January floods

Heavy rains caused flooding in central provinces

Following a delayed onset and subsequent erratic rains in October and November resulting in dry conditions, heavy downpours since late December triggered flooding in central parts of the country, causing crop losses, and damage to houses and infrastructure. Monthly cumulative rainfall levels in December were well above-average, over 80 percent in some areas in the centre and south. The heavy rains continued into January, with nearly twice the average volume recorded during the first two dekads in the main cereal producing Zambezia province. The forecast for the following week indicates a continuation of abundant precipitation in northern and central areas, increasing the possibility of further floods.

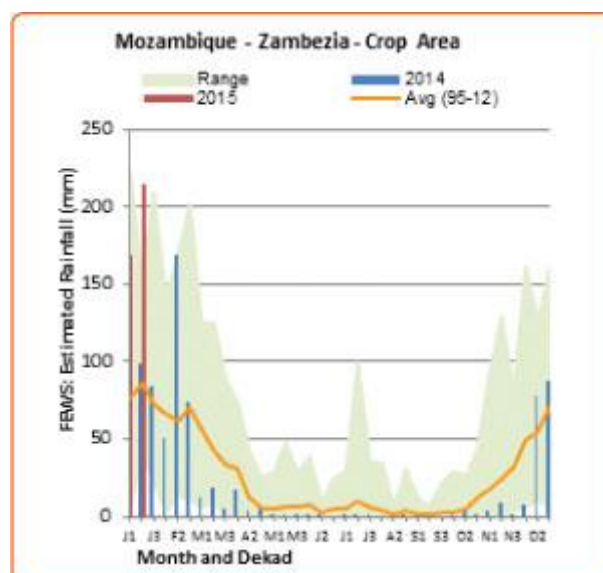
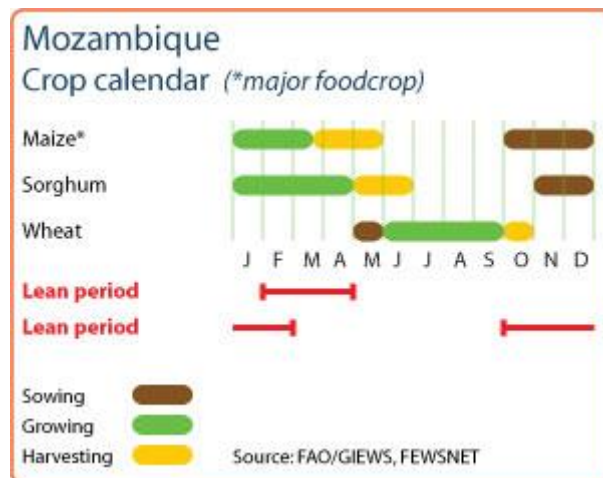
Early assessments indicate that approximately 87 000 hectares of cropped land have been affected, mostly in Zambezia and Manica provinces which, combined, produce about one-third of the total national cereal output. At the national level, although the area affected only constitutes about 2 percent of national plantings for all crops, any production losses will negatively impact on local food supplies.

Improved cereal supply situation in 2014/15

Overall supply conditions improved in the 2014/15 marketing year (April/March), on account of the recovery in the 2014 maize harvest, estimated at about 1.9 million tonnes. A slight expansion in plantings and higher yields, reflecting favourable rains, account for the increase, in spite of some rainfall deficits in southern parts. Overall, total cereal production was estimated at 2.5 million tonnes, 13 percent up on 2013's output.

Maize prices rise seasonally but remain below year-earlier levels

Despite recent seasonal increases, maize prices are up to 30 percent below their year-earlier levels as of January 2015 reflecting improved supplies in 2014/15. Lower prices in South Africa, which exports, on average, over 100 000 tonnes of maize to Mozambique each year, have also contributed to curtailing inflationary pressure on maize prices in 2014.



Mozambique Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes		percent	
Maize	1 888	1 631	1 900	16
Sorghum	310	188	225	20
Rice (paddy)	297	351	343	-2
Others	54	48	48	0
Total	2 549	2 218	2 516	13

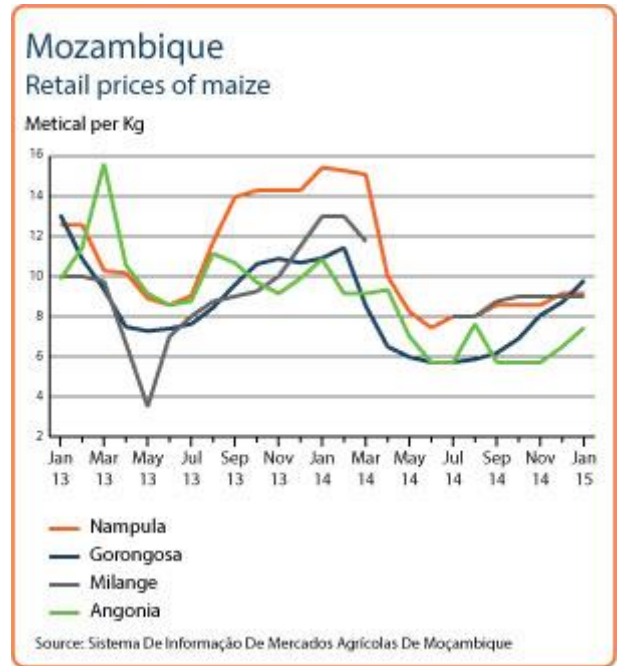
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

In areas affected by flooding, disruption to trade flows could result in reduced market supplies exerting upward pressure on food prices.

Floods affects households in central provinces

The January floods have affected about 158 000 people, as of 25 January, of which approximately 124 000 are located in the Zambezia province, notably in the coastal districts of Maganja and Namacurra. Food assistance is being provided to the affected population, while preliminary assessments have been conducted to identify the agricultural needs, including seeds for the minor secondary season with planting beginning in March/April.

In 2014, the Vulnerability Assessment Committee (VAC) estimated that 150 000 people would be at risk of food security and would require assistance during the first quarter of 2015, to bridge their food supply gap. This was an improvement compared to the previous year, with 212 000 assessed to need food assistance in the previous year. The 2015 VAC assessment is expected to be available in July.



Reference Date: 18-November-2014

FOOD SECURITY SNAPSHOT

- Near-average rains in southern provinces at start of 2014/15 cropping season (October/June)
- Maize production in 2014 recovered from last year's reduced level
- Prices of maize remain stable and below last year's levels, reflecting larger supplies in 2014
- Food security conditions improved with good maize harvest

Planting of 2014 cereal crops underway

Cumulative rains during October, the beginning of the 2014/15 cropping season, have been near-normal in southern and some central provinces, with planting underway. In northern areas, planting is expected to commence in late November and December, as seasonal rains move further north. Forecasts from December 2014 to March 2015 indicate a higher probability of normal to above-normal rains across most of the country, apart from some areas of Cabo Delgado province, where drier conditions may be experienced until the end of the year. Overall, current forecasts point to a positive outlook for the 2015 cereal crops.

Cereal production increased in 2014

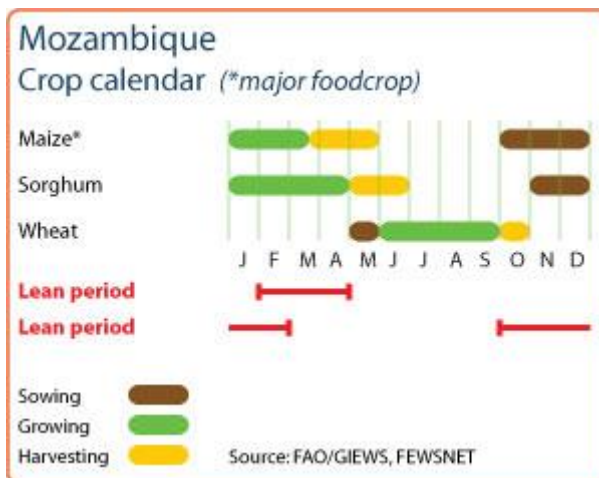
The 2014 maize harvest was estimated at about 1.9 million tonnes, recovering from the reduced outputs of the previous two years. A slight expansion in plantings and higher yields, reflecting favourable rains, account for the increase, in spite of some rainfall deficits in southern parts. Overall, total cereal production is estimated at 2.5 million tonnes, 13 percent up on 2013's output.

Maize prices remain well below year-earlier levels

After decreasing strongly earlier in the year, maize prices remained generally stable since July, with limited seasonal increases. Prices were well below their year-earlier levels (between 10 and 40 percent lower in November 2014 compared to November 2013), reflecting adequate national supplies.

Lower prices and ample maize supplies improved food security

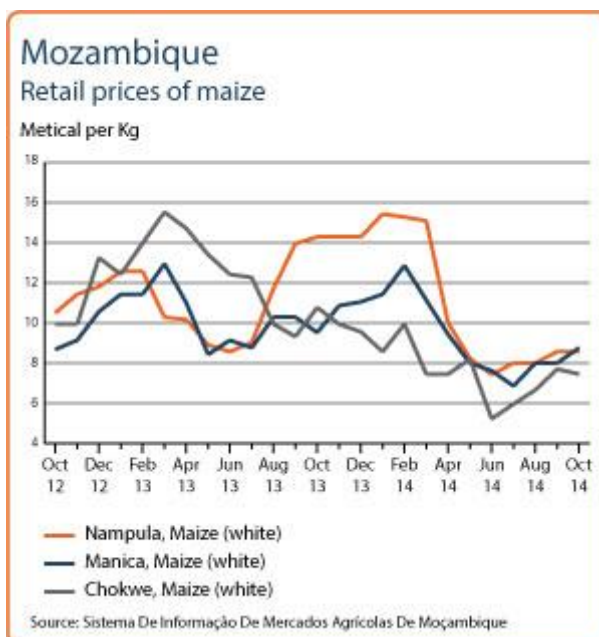
Overall, food security conditions are much improved compared to the previous year. The larger household stocks, on account of the increased cereal harvest, and lower prices have improved availability and access. Livestock conditions are also favourable, reflecting adequate pasture availability. However, an estimated 150 000 people remain at risk of food security and require assistance between December 2014 and March 2015, mainly due to production shortfalls caused by floods.



Mozambique Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013 percent
	000 tonnes			
Maize	1,888	1,631	1,900	16
Sorghum	310	188	225	20
Rice (paddy)	297	351	343	-2
Others	54	48	48	0
Total	2,549	2,218	2,516	13

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Reference Date: 08-July-2014

FOOD SECURITY SNAPSHOT

- The 2014 maize production recovered from last year's reduced level
- Prices decreased sharply with the improved maize harvest
- Food security conditions improved with the good maize harvest

The 2014 maize production recovered from last year's reduced level

Harvesting of the 2014 main season coarse grain crop was concluded in May. The 2014 maize output was estimated at about 1.9 million tonnes, recovering from the reduced level of the previous two years. A slight expansion in plantings and higher yields, following overall good rains during the cropping season, accounted for the increase in cereal production, in spite of rainfall deficits in southern parts.

Prices decreased sharply with the improved maize harvest

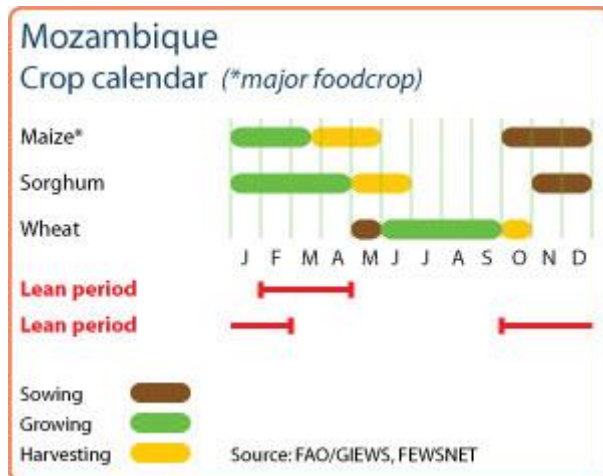
Maize prices of maize, the main staple in the country, have decreased by more than one-third in most markets over the past three months. The decline is a result of the downward pressure exerted by new supplies from the 2014 harvest. Overall, prices in June were considerably lower than a year earlier.

Prices of rice, the main staple in the capital Maputo, have remained stable since the beginning of the year, supported by stable or falling international prices.

Overall food security conditions improved with the good maize harvest and lower prices

Overall, food security conditions are expected to improve significantly this year, following a tight situation in 2013/14 that was largely attributed to a lower national harvest and increasing maize prices.

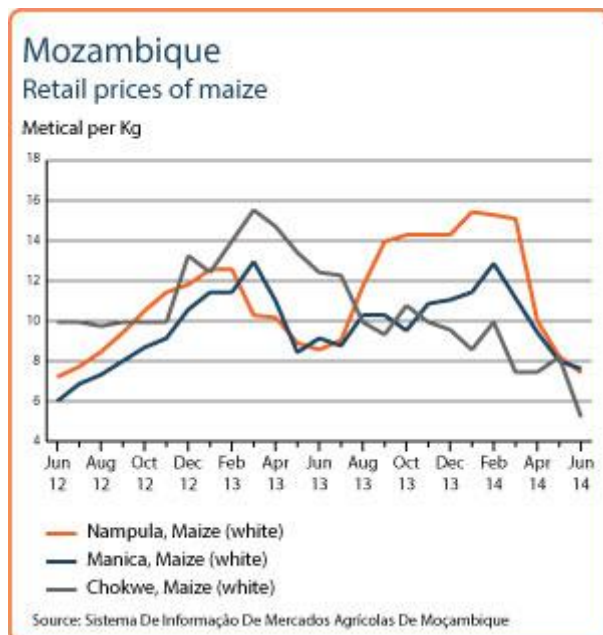
In the immediate period, as supplies increase with the 2014 harvest and prices decline, food access and availability are anticipated to improve at household level.



Mozambique Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes			percent
Maize	1,888	1,631	1,900	16
Sorghum	310	188	225	20
Rice (paddy)	297	351	343	-2
Others	54	48	48	0
Total	2,549	2,218	2,516	13

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Reference Date: 12-February-2014

FOOD SECURITY SNAPSHOT

- Overall favourable prospects for the 2014 cereal crop
- Maize production expands marginally in 2013
- Sharp increase in maize prices in central and northern markets
- Food security conditions generally stable, but conflict in central and southern areas affect household food security

Favourable cereal production prospects for 2014

Harvesting of the 2014 cereal crops will begin in March in southern provinces, while crops in northern areas are expected to reach maturity in April-May. Rains during the current 2013/14 cropping season (October-June) have been generally satisfactory, with some rainfall deficits recorded in northern interior areas in the last quarter of 2013. Limited crop damage in localised areas in the centre and north were caused by heavy rains in January and subsequent flooding, and an outbreak of army worms in Nampula province. However, overall, early indications point to a slight expansion in plantings this year and prospects are for an above average harvest.

Minor increase in the 2013 cereal harvest

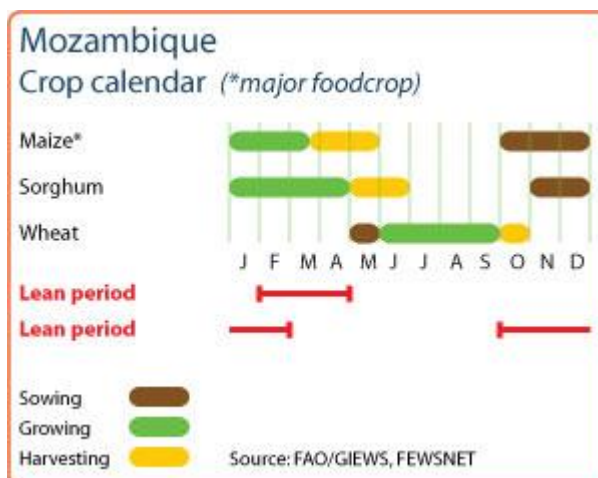
The 2013 cereal output was estimated at about 2.2 million tonnes, marking a marginal increase over the previous year's harvest. Generally good climatic conditions largely accounted for the production gains in 2013, but some flood damage in the southern province of Gaza resulted in the loss of about 153 000 hectares of crops (approximately 3 percent of the total planted areas at the national level). However, an expansion in post-flood plantings and subsequently improved production of the secondary season crop, harvested between August and September 2013, off-set some of the production losses and helped to maintain good supplies in southern flood affected areas.

Maize prices rise markedly in central and northern markets

Overall, maize prices firmed up during the last quarter of 2013 and the start of 2014 and in several markets prices reached record levels at the start of 2014. In the northern city of Nampula, prices rose markedly in January after a stable period since September, with similar month-on-month increases observed in markets in central provinces. In the southern town of Chokwe, prices of maize continued their decline, with an above-normal secondary season harvest at the end of 2013 boosting local supplies. While maize prices have shown generally increasing trends, prices of rice, a staple food in the capital Maputo, have remained stable during most of 2013 and into January, supported by stable or falling international prices. Furthermore, the strengthening of the national currency (metical) against the South African Rand helped to stem imported inflationary pressure, particularly as maize prices in South Africa increased sharply since December to reach record levels at the start of 2014.

Food security situation generally stable

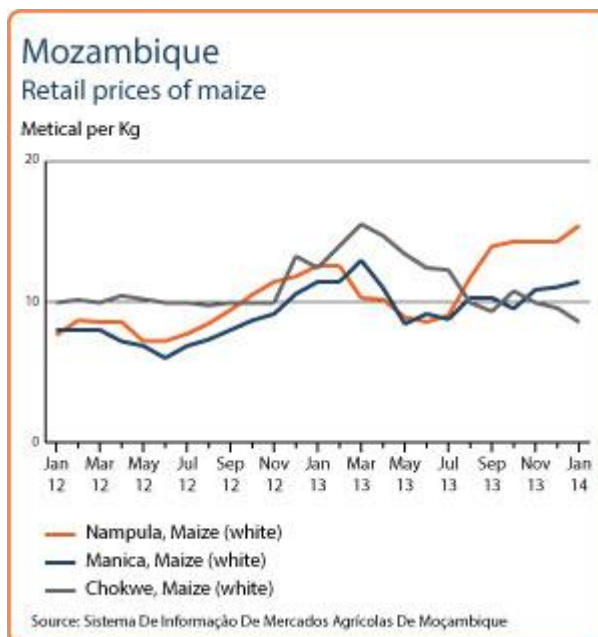
Overall, food security conditions are generally stable. Households that suffered production losses due to floods in the southern Limpopo river



Mozambique Cereal production

	2012	2013 estimate	change 2013/2012
	000 tonnes		percent
Maize	1 610	1 631	1
Sorghum	184	188	2
Rice (paddy)	343	351	2
Others	40	48	20
Total	2 177	2 218	2

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



basin (Gaza province) in 2013, benefited from residual flood waters to increase production in the second season, mitigating the impact of earlier production shortfalls. Conflict between security forces and Resistência Nacional Mocambiçana (Renamo) in localised parts of central and southern provinces, including the districts of Gorongosa, Chibabava, Maringue, Homoine and Funhalouro resulted in some population displacement, disrupting cropping activities of the affected households, and restricting market access. The government and humanitarian partners are providing assistance.

Reference Date: 11-November-2013

FOOD SECURITY SNAPSHOT

- Planting in southern regions for the 2013/14 cropping season began in October
- Cereal production in 2013 increased by about 2 percent over the previous year's level
- Maize prices rise more steeply in central and northern markets
- Overall food security situation is stable, with second season harvests in southern areas improving food availability

Favourable rains predicted for start of 2013/14 cropping season

Seasonal rains commenced in the second half of October in southern regions and some coastal areas, aiding land preparation and planting for the 2013/14 cropping season (October-June). Weather forecasts indicate normal to above normal rains during most of the cropping season, with an increased chance of heavier precipitation in large producing northern provinces during the first quarter of 2014.

Cereal output in 2013 rises above last year's output

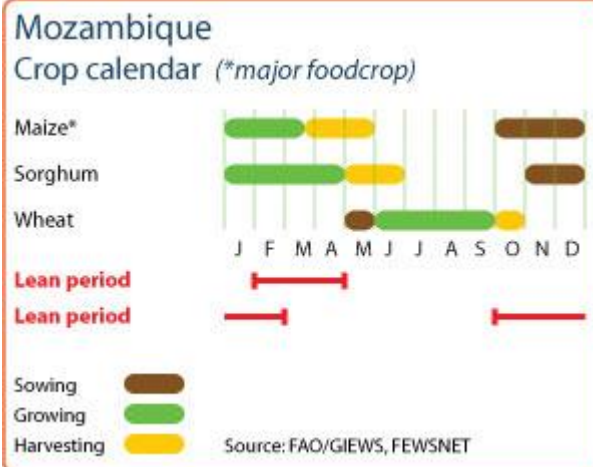
Production estimates for the main 2012/13 season's cereal crops, harvested in June, point to a slight increase for maize, while sorghum is also estimated to be above the previous season's level, at 188 000 tonnes. Generally good climatic conditions were recorded across most of the country, largely accounting for the production gains this year. However, flooding in the southern province of Gaza, resulted in the loss of about 153 000 hectares of crops (approximately 3 percent of the total planted areas at the national level), including maize, rice, beans and other vegetables. Some flood damage to crops was also recorded in the central Zambezi river basin.

Maize prices increasing, but remain more stable in the southern markets

Maize prices in the southern markets have shown slightly more stable trends in the past months compared with central and northern markets; however, prices are generally at higher levels than one year earlier. New supplies from the second season's harvest and the appreciation of the metical against the South Africa Rand, combined with lower year-on-year grain prices in South Africa, which supplies a large quantity of maize to southern provinces, have helped temper price levels in the south. In contrast prices in some northern markets have shown strong price gains in recent months, due to a tighter supply situation. In Nampula, for example, prices in October (about 36 percent above their levels of the previous year) exceeded prices in Maputo, in contrast to previous years when they are usually about half the level, following a 60 percent rise between July and September.

Food security situation generally stable

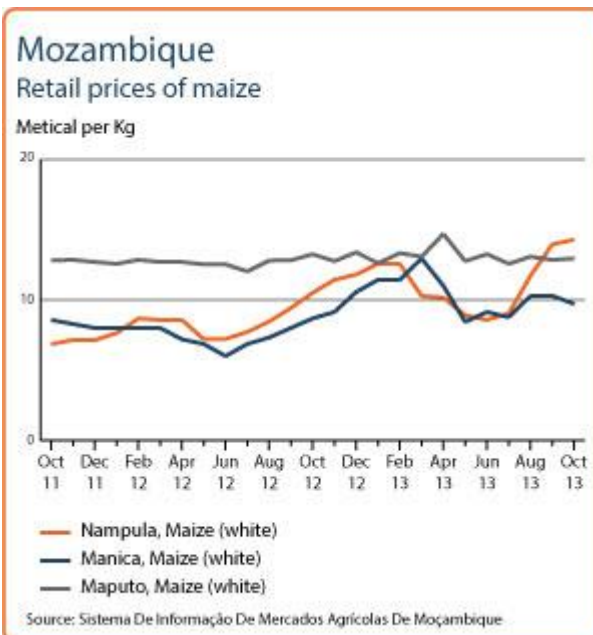
Overall, food security conditions are generally stable. In the southern Limpopo river basin (Gaza province), some households that suffered flood-induced production losses earlier in the year, were able to benefit from residual flood waters and expand plantings for the second season,



Mozambique Cereal production

	2012	2013 estimate	change 2013/2012
	000 tonnes		percent
Maize	1 610	1 631	1
Sorghum	184	188	2
Rice (paddy)	343	351	2
Others	40	48	20
Total	2 177	2 218	2

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



helping to mitigate the impact of the production shortfalls. However, higher food prices continue to constrain food access.

Reference Date: 11-February-2013

FOOD SECURITY SNAPSHOT

- Heavy rains and floods cause damage to crops in southern regions
- Maize prices rise steeply following lower 2012 cereal production
- Recent floods have aggravated food insecurity conditions in southern areas, while increasing maize prices limit food access

Heavy rains in January 2013 cause flood damage in southern regions

Abundant rains received in January 2013 caused flooding in southern parts of the country, inundating cropped fields in riverine areas, particularly in Gaza Province. Preliminary estimates indicate that approximately 153 000 hectares of crops, including maize, rice, beans and other vegetables, have been lost due to the floods and an earlier dry spell. Although at the national level this area represents approximately 3 percent of the total planted area, localised production short-falls will have negative consequences for household food security. The rains have subsided since late January in southern provinces, although significant precipitation was recorded in early February in central and northern regions, increasing the risk of flooding in these parts, with potential adverse impacts on the agriculture sector.

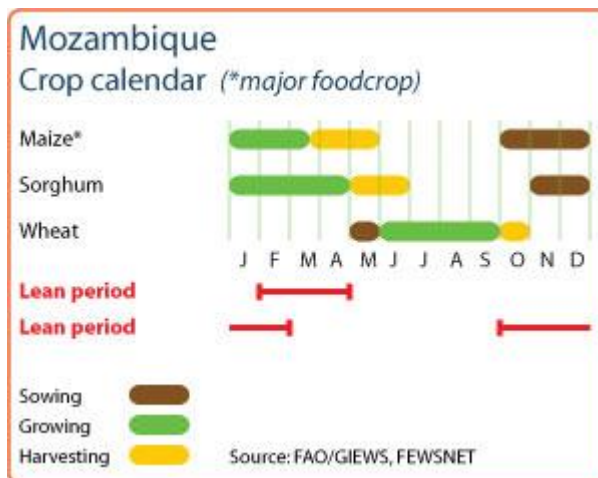
Prior to the floods in January, rainfall conditions varied across the country during the first three months (October to December) of the 2012/13 cropping season (October-June). Dry conditions were observed in southern areas where delayed planting activities necessitated replanting in several locations. In central and northern provinces, which constitute the main cereal producing areas of the country, the onset of seasonal rains and cumulative rainfall levels were comparable with the average. If favourable weather conditions continue and the flood damage remains limited, an improved national harvest relative to the poor output in 2012 is expected. However, in southern and central areas that suffered moisture deficits and flood damage, particularly in the Zambezi and Limpopo river basins, reduced yields are anticipated.

Cereal output declines in 2012

Erratic weather during the previous 2011/12 cropping season and a smaller area harvested had resulted in an overall decline in the 2012 cereal output; the national harvest was estimated at approximately 2.4 million tonnes, well below the previous year's record output of 2.9 million tonnes. Rice production however, put at 280 000 tonnes (milled terms), was up on 2011 harvest.

Maize prices rise reflecting low availabilities

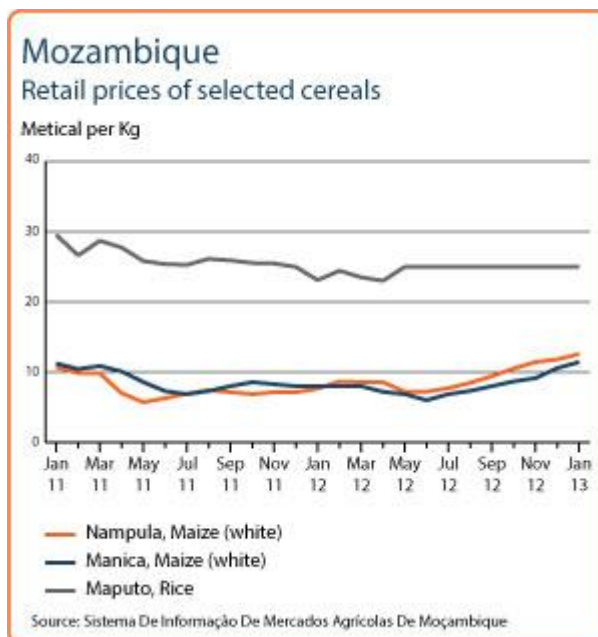
Prices of maize in January 2013 were well above those of a year earlier and remained close to their record levels of December 2012, despite declines in some markets. The increase in prices mainly reflect tighter market supplies following reduced production in 2012. However, in Maputo, where maize is mainly consumed by the low-income households, prices remained stable and at MZN 12.6 per kg are at similar levels to a year earlier. Given the increasing trends elsewhere, prices across the country are converging with Maputo's levels, which historically



Mozambique Cereal production

	2007-2011 average	2011	2012 estimate	change 2012/2011
	000 tonnes			percent
Maize	1,898	2,179	1,746	-20
Sorghum	381	410	239	-42
Rice (paddy)	235	271	343	27
Others	57	64	47	-27
Total	2,571	2,924	2,375	-19

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



have been nearly double the level of northern markets. In addition, the recent heavy rains and localized floods in January disrupted access to some markets, with reports indicating reduced food supplies in the wholesale markets of Maputo, Gherkin, Beira and Nampula. In the most-affected Gaza Province, the closure of the main market warehouse in Chokwe triggered market shortages in other areas of the province, instigating sharp price rises. By contrast prices of rice, which is mainly consumed in southern markets, have been stable for much of 2012 and remain relatively unchanged compared to levels one year earlier.

Higher maize imports for current 2012/13 marketing year

Given the reduced maize output in 2012, imports are estimated to exceed 100 000 tonnes in the 2012/13 marketing year (April/March), compared to the estimated 87 000 tonnes imported in 2011/12. Between April 2012 and January 2013, approximately 60 000 tonnes of maize had been imported from South Africa, while about 30 000 tonnes have been imported from Zambia. With only two months remaining of the current marketing year, the national import requirement is expected to be satisfied, as the pace of imports from South Africa tend to pick up towards the end of the marketing year.

Emergency supplies required for flood affected population

The January floods have affected an estimated 213 000 persons, with approximately 140 000 persons displaced in the most-affected Gaza Province. As well as destruction to homesteads and infrastructure, the floods resulted in crop losses, which is likely to result in reduced availabilities for affected households in 2013. Emergency supplies are being provided to the affected population in Gaza Province, including distribution of food by air in isolated areas.

Reference Date: 21-September-2012

FOOD SECURITY SNAPSHOT

- Lower cereal harvest in 2012
- Maize prices rise following seasonable declines earlier in the year
- Food insecurity aggravated by production losses in 2012 in southern and central areas

Cereal harvest decreases in 2012 compared to last year

Harvesting of the 2012 main season's cereal crops was finalised under generally dry conditions in June; however, localized heavy rains were observed in parts of the north that may have disrupted harvesting activities.

In the large northern producing provinces, which account for between 30-40 percent of the total national maize output (the country's main cereal), favourable rains were received during much of the cropping season (October-May). However, generally poor rains were observed in southern and central provinces, particularly the interior areas of Inhambane, Gaza, Tete and Sofala, impacting negatively on crop production. In addition, the passing of four consecutive tropical cyclones during the first quarter of 2012 resulted in localised flooding, affecting 141 000 hectares of cropped land in southern and central parts. As a result of the generally erratic weather conditions, provisional production estimates for the 2012 main cropping season point to a national cereal harvest of approximately 2.3 million tonnes, which is below last year's record output. The poor rains and a smaller area harvested contributed to a lower maize output, with production estimated to be near the previous five-year average, while declines for millet and sorghum are also estimated. However, rice production, put at 280 000 tonnes (milled terms), is estimated to be slightly up on 2011's harvest. Increased investment in irrigation schemes in southern provinces supported higher yields, despite some damage from heavy rains.

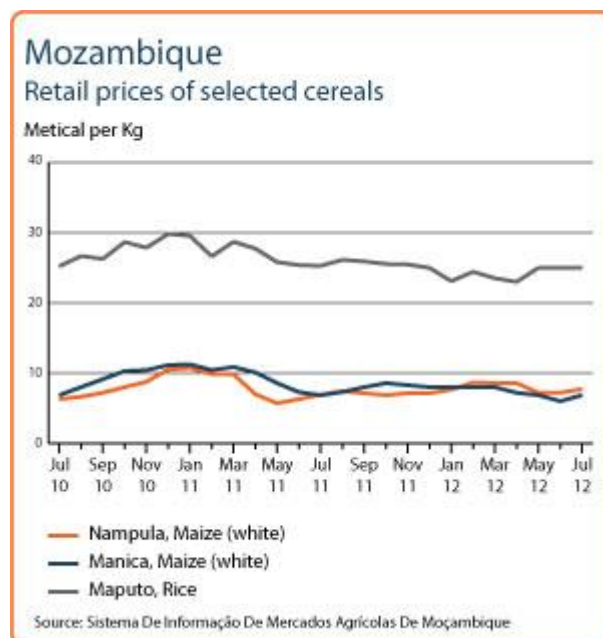
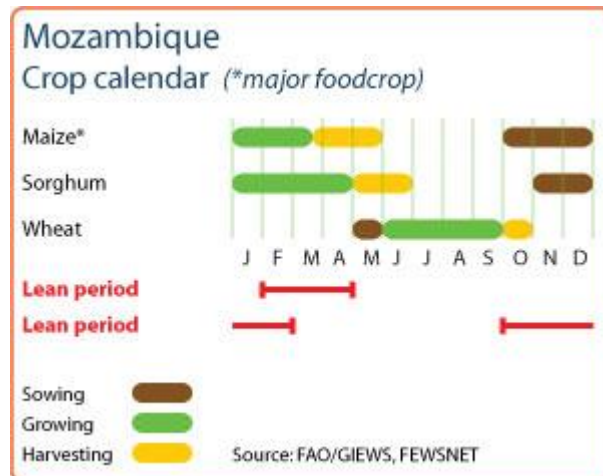
Furthermore, the second season crops, currently being harvested, were affected by poor residual moisture following the lack of sufficient rains in southern areas during the main rainy season (October-March). Rainfall levels since April – the start of the planting period for the second season – have also been generally below average and may further limit production.

Investment supports cash crop production gains

Sustained investment and an expansion in sugarcane cultivation have supported production growth, with strong gains recorded in the past three seasons. Production is estimated to have increased to approximately 4 million tonnes in 2011/12 and forecasts indicate a continued increase in subsequent seasons. Exports of sugar are forecast to rise in the 2012/13 marketing year (April/March), with the EU representing the largest market.

Prices begin to rise following seasonable declines

The 2012 harvest augmented market supplies and resulted in declining



maize prices to June. However, prices began to rise moderately from July corresponding to seasonable patterns and generally remain at levels above last year. Although most markets across the country exhibited normal seasonable patterns, prices in the southern cities of Chokwe and Maputo have shown more stable movements during 2012, fluctuating by less than MZN 1 between January and July. However, at MZN 10 (Chokwe) and MZN 12 (Maputo) per kg in July, they remain one of the highest prices in the country. Rice prices in Chokwe and Maputo have also remained unchanged in 2012, but while they have decreased marginally in Maputo since 2011, prices in Chokwe registered a 31 percent year-on-year increase in July 2012.

Larger import requirement for 2012/13 marketing year

Given the reduced maize output, imports are forecast to exceed 100 000 tonnes in the 2012/13 marketing year (April/March), compared to the estimated 87 000 tonnes imported in 2011/12. In addition, the record harvest last year, as well as the previous bumper harvests, resulted in high stock levels, which will help to partially cover the larger national deficit this year and limit further increases in imports. The difficulty still remains in transporting supplies from the surplus producing regions in the north to deficit areas in the southern provinces. Between April and July 2012, an estimated 12 000 tonnes of maize had been imported from South Africa, compared to 24 000 tonnes for the same period in 2011.

Production shortfalls in southern and central provinces aggravate food insecurity

Production losses caused by climatic shocks (dry spell and cyclone damage) in late 2011 and early 2012 aggravated food insecurity conditions in central and southern areas. According to the recent findings from the 2012 vulnerability assessment, which focused its evaluation in the Limpopo and Zambezi river basins, more than 255 000 persons are estimated to be food insecure in 11 districts. Of those, nearly 140 000 persons require urgent assistance to bridge their food deficits, estimated at approximately 7 500 tonnes of cereal. In addition to the low agricultural output, a depletion of productive assets and low income levels, combined with higher food prices, have also negatively impacted on food security conditions. Supplies from the minor second season harvest are expected to partly alleviate pressure on existing low household food stocks. However, generally unfavourable rainfall is likely to limit production in central and southern regions.

Reference Date: 22-March-2012

FOOD SECURITY SNAPSHOT

- An average maize crop expected in the 2011/12 season, but localised production declines anticipated in southern and central areas due to flooding and dry spells
- Maize prices remain generally stable, despite some seasonal increases
- Food security situation is satisfactory, but populations affected by production losses in 2011 and cyclone damage remain a concern

Average production prospects, but dry spells and flooding cause localised crop damage

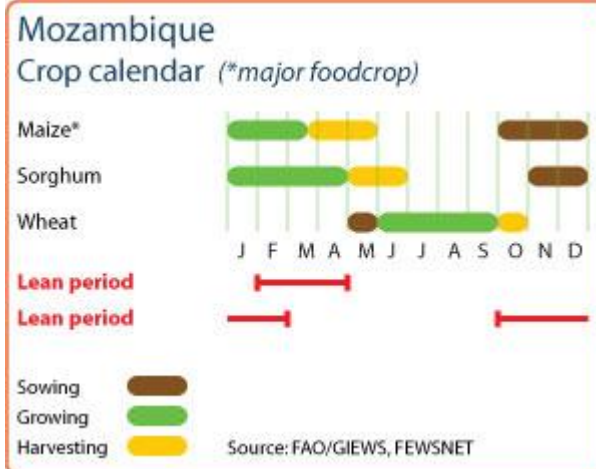
Harvesting of the main maize crop began in March in some parts of the south, while the crop stage ranges from vegetative to maturity in the centre and north. Crop conditions across the country are generally satisfactory. However, interior parts of Inhambane, Gaza, Tete and Sofala provinces received below average precipitation since the start of 2012, which reportedly caused crop stress and may negatively impact local production. Concurrently, the passing of four consecutive tropical cyclones (Chandra, Dando, Funso and Irina) during the first quarter of 2012 resulted in flooding, affecting 141 000 hectares of cropped land in southern and central provinces, including 42 000 hectares that were destroyed. The torrential rains, in addition, also helped to alleviate some moisture deficits emanating from irregular rains between October and December 2011. In spite of the impact resulting from tropical cyclones and dry spells, a near average harvest is anticipated.

Prices remain generally steady

Maize prices across the country have exhibited comparatively stable trends during the 2011/12 marketing year (April/March), showing some seasonal increases since mid-2011. In February 2012, prices were generally below levels of the same month in 2011, on account of good national supplies. In southern markets, prices are generally higher than those in the centre and north, however, price variations in south are much less pronounced.

Stable food security conditions, but areas of concern in southern and central provinces

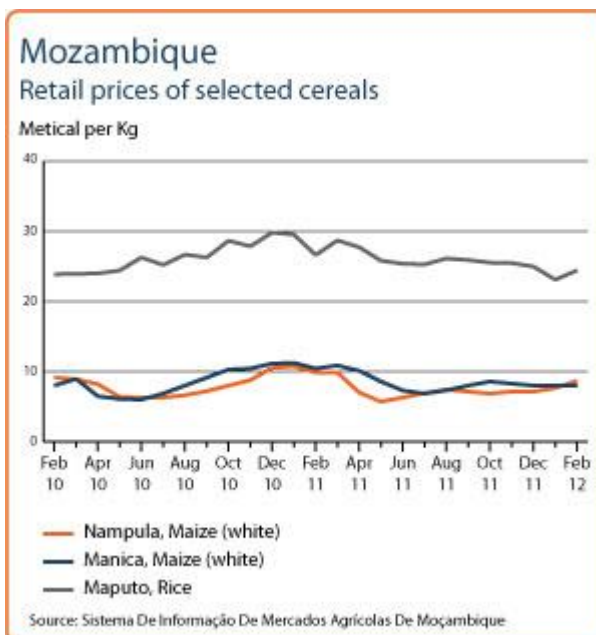
Despite improved food security conditions in 2011, pockets of vulnerability exist in some central and southern provinces, where an estimated 245 000 persons are in need of food assistance. Production losses caused by climatic shocks in 2011 resulted in an early depletion of households' food stocks, aggravating the conditions of the affected populations. Following a government assessment in October/November 2011, involving FEWSNET, the districts of Chigubo and Massangena in Gaza province were identified as areas requiring urgent humanitarian assistance. The relative stability of maize prices however, is expected to have a positive impact on food security conditions of the vulnerable population. In addition, flooding caused by successive tropical cyclones in early 2012 that resulted in damage to crops, homesteads and infrastructure, affected 119 471 person, including an estimated 83 000 people who require food assistance. Furthermore, the recent dry spell



Mozambique Cereal production

	2006-2010 average	2010	2011 estimate	change 2011/2010
	000 tonnes			percent
Maize	1 769	2 090	2 179	4
Sorghum	367	389	410	5
Rice (paddy)	217	258	271	5
Others	53	59	64	8
Total	2 406	2 796	2 924	5

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



and cyclone damage may cause a drop in local food production, aggravating food insecurity conditions in the next marketing year.

Reference Date: 31-January-2012

FOOD SECURITY SNAPSHOT

- The passing of tropical cyclones at the start of 2012 cause localised flooding and crop damage in southern areas
- Maize prices remained stable during the last quarter of 2011
- Overall food security is satisfactory, but populations affected by production losses in 2011 require assistance

Cyclones cause localised flooding and crop damage in southern and central provinces

The passing of three tropical cyclones, Chandra, Dando and more recently Funso, in January 2012 has affected about 117 000 persons, including just over 8 200 families that were left homeless. In addition, damage to just under 100 000 hectares of cropped land in Maputo, Gaza, Inhambane, Sofala and Zambézia provinces were reported. Although this area represents a small proportion at the national level, irreversible damage to crops could have a bearing on the food security conditions of the affected households. More detailed information will be available in the next month, following a damage assessment scheduled to be conducted at the beginning of February.

The heavy rains follow a period of below average precipitation from late November through to December 2011 that caused water deficits in central and northern areas, particularly impacting the provinces of Capo Delgado, Nampula, Niassa, Sofala and Tete. Preliminary estimates for cereal plantings point to a slight increase relative to the last cropping season.

Larger cereal output in 2011

Aggregate cereal production in 2011 is estimated at 2.84 million tonnes, some 5 percent above the previous season's output, with central provinces contributing about 50 percent of the total national cereal production. Rice production registered the largest increase over 2010's output at 6 percent.

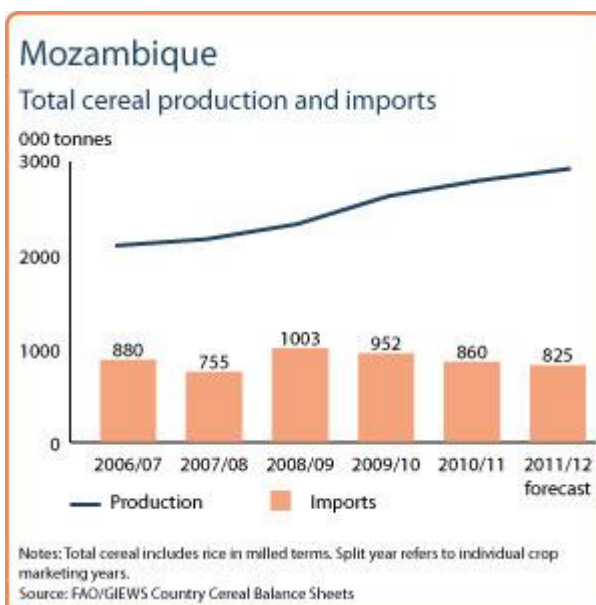
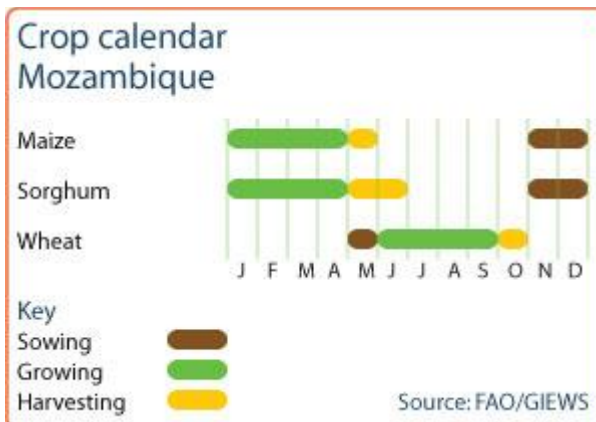
Prices remain steady at the end of 2011

Maize prices across the country have exhibited comparatively stable trends during the last quarter of 2011, showing slight seasonal increases. Prices were generally below levels of December 2010, but some markets registered higher prices, such as Chokwe where monthly maize prices were 9 percent higher in December 2011. The lower prices have been supported by the improved harvest gathered earlier in 2011.

Monthly imports of maize from South Africa during the current 2011/12 marketing year (April/March) are lower compared to 2010/11, reflecting improved domestic supplies and therefore a reduced import requirement.

Pockets of food insecurity remain in southern and central areas

Despite improved food security conditions in 2011, pockets of

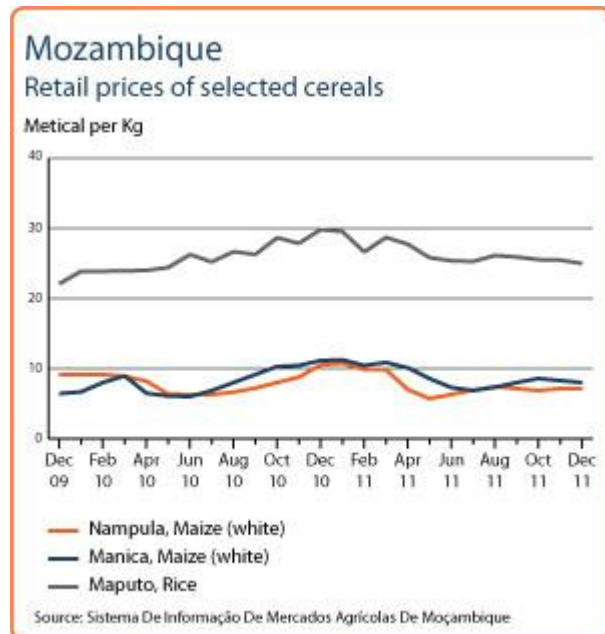


Mozambique Cereal production

	2006-2010 average	2010	2011 estimate	change 2011/2010
	000 tonnes		percent	
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Others	53	59	64	8
Total	2 406	2 796	2 924	5

Note: percentage change calculated from unrounded data.
 Source: FAO/GIEWS Country Cereal Balance Sheets

vulnerability exist in some central and southern provinces, where an estimated 200 000 to 250 000 persons are in need of food assistance. Production losses caused by climatic shocks in 2011 resulted in an early depletion of households' food stocks, aggravating the conditions of the affected populations. Following a government assessment in October/November 2011, involving FEWSNET, the districts of Chigubo and Massangena in Gaza province were identified as areas requiring urgent humanitarian assistance. The relative stability of maize prices however, is expected to have a positive impact on food security conditions of the vulnerable population.



Reference Date: 12-January-2012

FOOD SECURITY SNAPSHOT

- The start of the 2011/12 cropping season was characterised by erratic rains
- Maize prices remained stable during the last quarter of 2011
- Overall food security is satisfactory, but populations affected by production losses in 2011 require assistance

Mixed performance of rains during start of 2011/12 season

Following favourable rains at the start of the 2011/12 cropping season, which normally begins in October, precipitation levels declined in late November and December causing water deficits in some central and northern provinces, particularly impacting the provinces of Capo Delgado, Nampula, Niassa, Sofala and Tete. However, significant rains during the first dekad of January 2012, associated with the formation of tropical storm Chandra, helped to offset low cumulative amounts and partly alleviated mid-season dryness. The heavy rains may have also led to localised flooding, especially in Nampula province, which received the heaviest rains, approximately twice the level of the average. Preliminary estimates for cereal plantings point to a slight increase relative to the last campaign, but more firm estimates are not yet available.

Larger cereal output in 2011

Aggregate cereal production in 2011 is estimated at 2.84 million tonnes, some 5 percent above the previous season's output, with central provinces contributing about 50 percent of the total national cereal production. Rice production registered the largest increase over 2010's output at 6 percent.

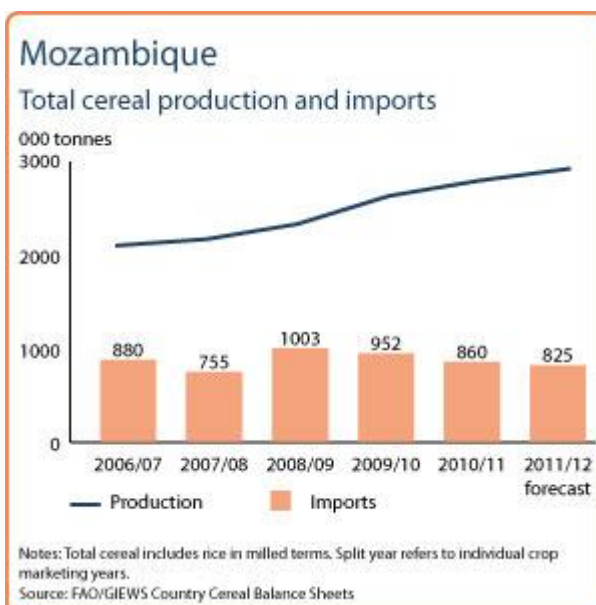
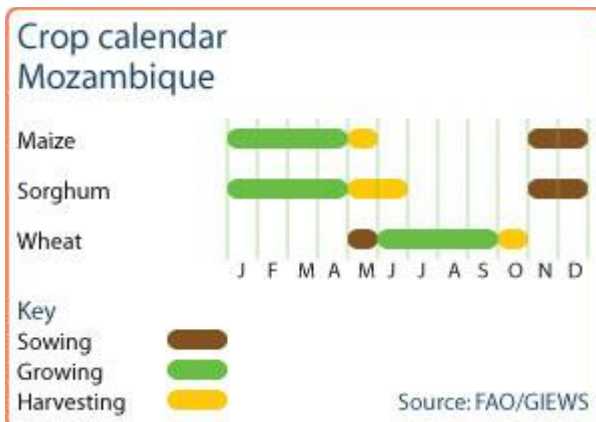
Prices remain steady at the end of 2011

Maize prices across the country have exhibited comparatively stable trends during the last quarter of 2011, showing slight seasonal increases. Prices were generally below levels of December 2010, but some markets registered higher prices, such as Chokwe where monthly maize prices were 9 percent higher in December 2011. The lower prices have been supported by the improved harvest gathered earlier in 2011.

Monthly imports of maize from South Africa during the current 2011/12 marketing year (April/March) are lower compared to 2010/11, reflecting improved domestic supplies and therefore a reduced import requirement.

Pockets of food insecurity remain in southern and central areas

Despite improved food security conditions in 2011, pockets of vulnerability exist in some central and southern provinces, where an estimated 200 000 to 250 000 persons are in need of food assistance. Production losses caused by climatic shocks in 2011 resulted in an early depletion of households' food stocks, aggravating the conditions of the affected populations. Following a government assessment in

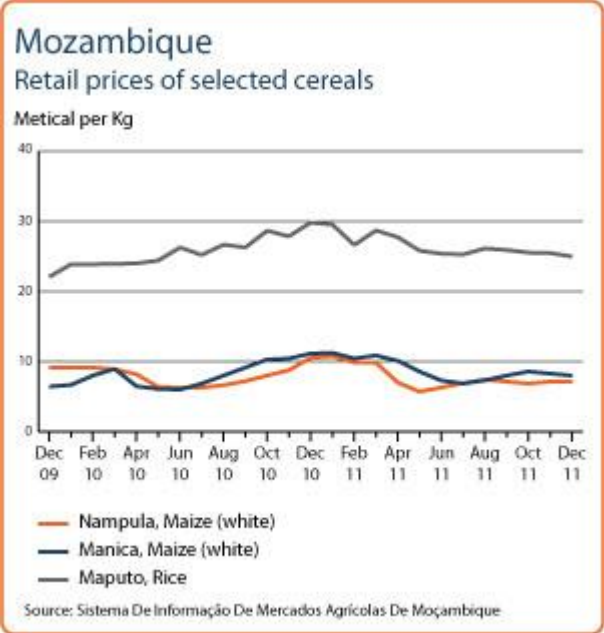


Mozambique Cereal production

	2006-2010 average	2010	2011 estimate	change 2011/2010
	000 tonnes		percent	
Maize	1 769	2 090	2 179	4
Sorghum	367	389	410	5
Rice (paddy)	217	258	271	5
Others	53	59	64	8
Total	2 406	2 796	2 924	5

Note: percentage change calculated from unrounded data.
 Source: FAO/GIEWS Country Cereal Balance Sheets

October/November 2011, involving FEWSNET, the districts of Chigubo and Massangena in Gaza province were identified as areas requiring urgent humanitarian assistance. The relative stability of maize prices however, is expected to have a positive impact on food security conditions of the vulnerable population.



Reference Date: 22-August-2011

FOOD SECURITY SNAPSHOT

- Despite a dry spell and localised flooding, national cereal production increased by 5 percent in 2011
- Maize prices increased slightly, with the highest prices recorded in the south
- Overall food security is satisfactory, but areas affected by production losses and households susceptible to high prices remain a concern

Expansion in cereal production in 2011

Latest production estimates point to a larger cereal harvest for the 2010/11 agricultural campaign relative to the previous season's output. Rainfall performance (October-May) was generally satisfactory, but a dry spell affected southern provinces and some central areas during February/March 2011. However, the impact was relatively limited, given the stage of the agricultural campaign, where most crops had reached maturity or were being harvested. In the months preceding the dry spell, flooding during the beginning of 2011 caused localised losses in riverine areas in southern and central river basins. Official estimates indicate that nearly 32 000 hectares were damaged while 22 610 hectares of cropped land was lost to floods. Although this had an impact at the local level, the losses represent less than one percent of the total cropped area of about 4.2 million hectares in 2010/11.

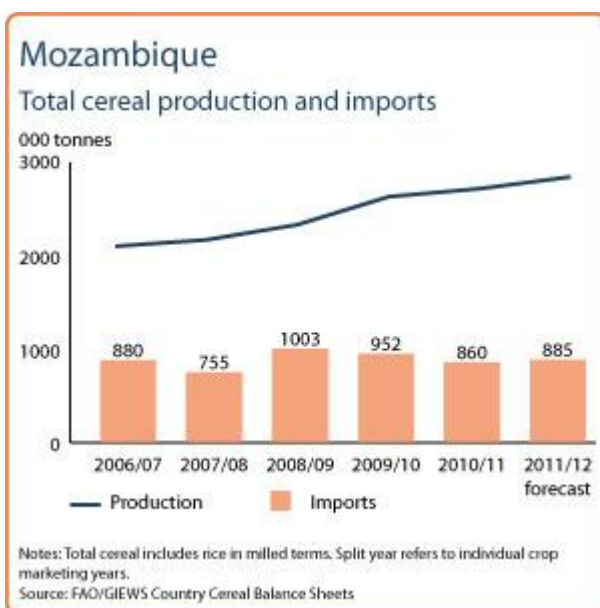
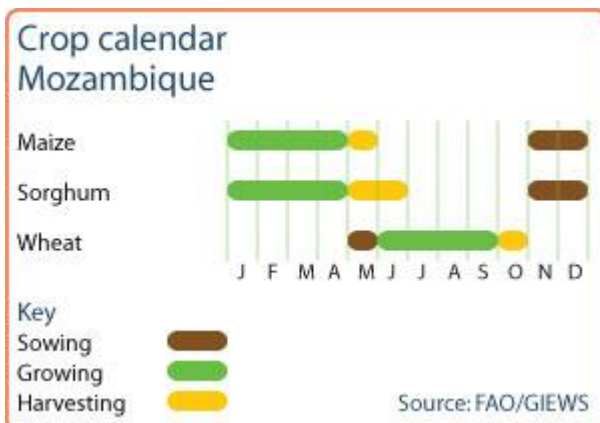
At an estimated 2.84 million tonnes, cereal production increased by some 5 percent compared to last season, with central provinces contributing approximately 50 percent to total national cereal production, a similar level to last year. Rice production registered the largest increase over last year's output at 6 percent. The increase in aggregate production is also reflected in a rise in per capita production levels.

Harvesting of the minor secondary season crops, predominantly vegetables, is currently underway, with indications pointing to generally favourable crop conditions. Although output is very limited compared to the main season's harvest, secondary season supplies assist in buffering households' stocks and serve as a source of additional income. Agricultural inputs, including seeds, were distributed through Government programmes to support production of the minor season.

Prices remain generally stable

In August 2011, maize prices increased slightly, albeit differentially. The lowest prices, at just over MZN 5 per kg, were observed in the northern province of Niassa and the central province of Tete, and the highest prices were recorded in Maputo.

In July, the government reduced its subsidy on wheat flour by 25 percent, equivalent to MZN 50 per 50 kg of flour. Between the introduction of the subsidy in September 2010 and August 2011, the national currency (Metical) has appreciated by about 25 percent against the USD, which has partly offset the impact of increasing international wheat price and could act to lessen the affect of the removal of the subsidy. Wheat is almost totally imported, except for a small quantity produced domestically.



Mozambique Cereal production

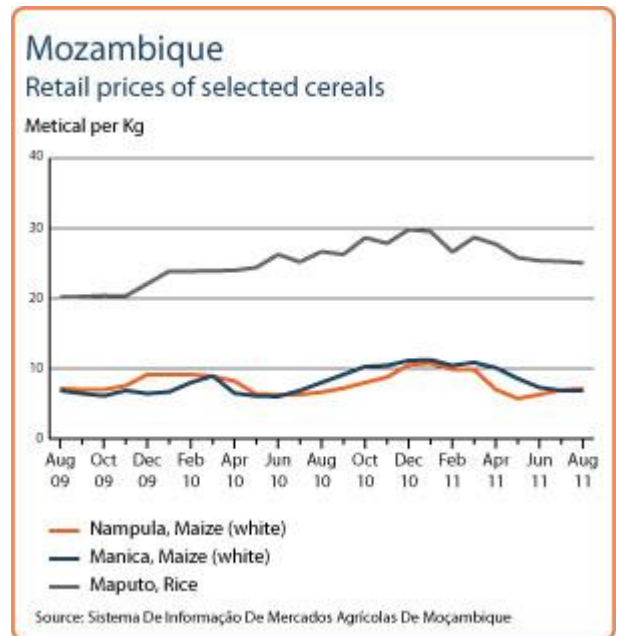
	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes			percent
Maize	1 769	2 090	2 179	4
Sorghum	367	389	410	5
Rice (paddy)	202	179	190	6
Others	414	438	462	5
Total	2 390	2 717	2 843	5

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Import requirements for the 2011/12 marketing year are expected to remain at similar levels to last year, with the large urban centres in the south satisfying their cereal consumption requirements predominantly through imports from South Africa.

Generally stable food security conditions, but pockets of difficulties persist

Overall, food security conditions are stable following an improved 2011 harvest. However, production losses caused by climatic shocks, particularly in southern provinces, are expected to constrain households' capacity to access adequate food supplies as the lean season approaches. In total, an estimated 118 528 people were adversely affected by flooding, with the large majority located in the southern Limpopo basin. Based on the results from the vulnerability assessment earlier in the year, food reserves from own production would have been exhausted by July 2011 in some central and southern areas. Such low levels of food stocks combined with seasonable rising prices in the coming months are expected to negatively affect the food security conditions of low income/resource poor households. Close monitoring of the situation is warranted.



Reference Date: 18-May-2011

FOOD SECURITY SNAPSHOT

- Despite a dry spell and localised flooding, national cereal production estimates are favourable
- Maize prices decline steeply in some markets, reflecting the good cereal production prospects
- Overall food security is satisfactory, but areas affected by production losses and households susceptible to high prices remain a concern

Good cereal harvest expected for 2010/11 season

Harvesting of the 2011 maize crop, which began in March in southern provinces, is underway across all provinces. Rainfall in northern provinces was generally below normal between October and December, delaying planting activities in some areas, and increasing from January onwards. The opposite is true for much of the central and southern areas that were affected by a dry spell that started in February, following predominantly favourable rainfall months. By that time most crops had already reached maturity or were being harvested, limiting the negative impact of the dry spell. However, the sorghum crop in central provinces was affected by insufficient moisture levels during February and March, with low yields expected as a result. Furthermore riverine flooding caused localised damage to crops in southern and central river basins. Official estimates indicate that nearly 32 000 hectares were damaged while 22 610 hectares of cropped land was lost. Although this could impact local production levels, at the national level the area lost represents less than one percent of the total cropped area of about 4.2 million hectares in 2010/11. Despite the effect of heavy rains and a dry spell, cereal production estimates for the 2010/11 season remain satisfactory, with maize production anticipated to be slightly above the output of last year.

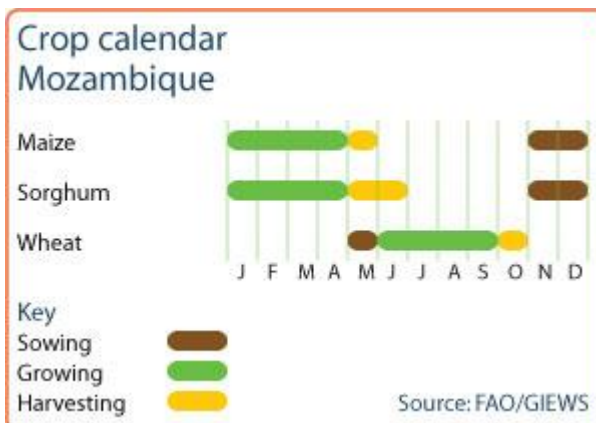
Declining maize prices reflect positive crop prospects

As market supplies are augmented by the continuing cereal harvest, maize prices have been falling in most markets since March 2011. The largest decrease was recorded in Milange, Zambezia province, where maize prices fell to MZN 2.75 per kg at the beginning of May, marking a 66 percent reduction since January. Elsewhere, price declines for maize have ranged between 10 and 50 percent over the same period and are generally lower, with the exception of Manica and Montepuez, than the same period last year.

Rice prices have remained persistently high during 2010, but fell by 12 percent at the beginning of May 2011 from their peak in December 2010, largely reflecting the drop in international prices. Commercial rice imports cover more than two thirds of the national consumption requirements.

Generally stable conditions, but pockets of food insecurity persist

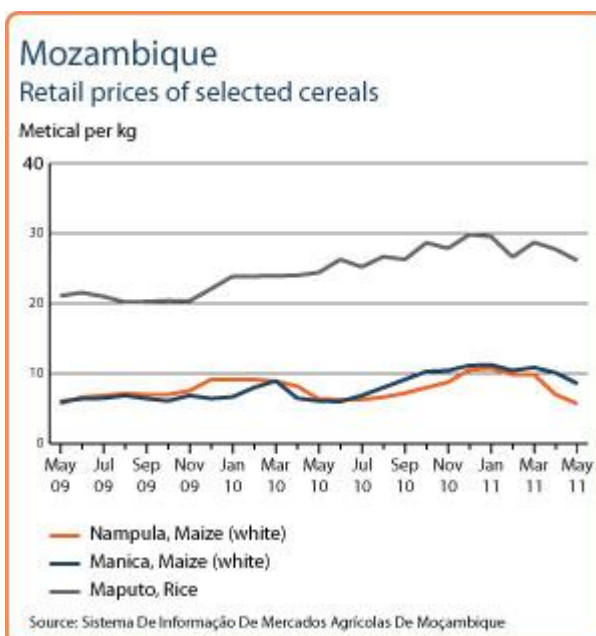
Overall, the national food security situation is satisfactory. The new supplies from the 2011 harvest are also expected to assist in further improving the situation. However, production losses caused by climatic shocks in central and southern provinces could constrain food reserve



Mozambique Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes		percent	
Maize	1 726	1 878	1 950	4
Sorghum	366	384	390	2
Rice (paddy)	202	179	190	6
Others	413	433	440	2
Total	2 347	2 500	2 592	4

Note: percentage change calculated from unrounded data.
 Source: FAO/GIEWS Country Cereal Balance Sheets



stocks of the affected households. These areas need to be monitored closely, and more information will become available following the completion of the vulnerability assessments in the coming months. Furthermore, despite the recent decline, food prices remain relatively high, negatively impacting food security conditions of poor households, as food purchases constitute the bulk of their expenditures and are therefore more vulnerable to rising and higher prices. However, good production from the minor secondary season could assist in supplementing households' food stocks and lessening households' reliance on market supplies.

Reference Date: 15-January-2011

FOOD SECURITY SNAPSHOT

- Favourable rains across most of the country benefit the 2010/11 season's crops
- However, heavy rains in central areas caused some damage to crops and raised concerns about possible floods
- Maize prices remain high and are increasing in northern markets, while rice prices continue their upward trend in Maputo
- Overall food security is still satisfactory, but an estimated 350 000 persons will require assistance until the 2011 cereal harvest

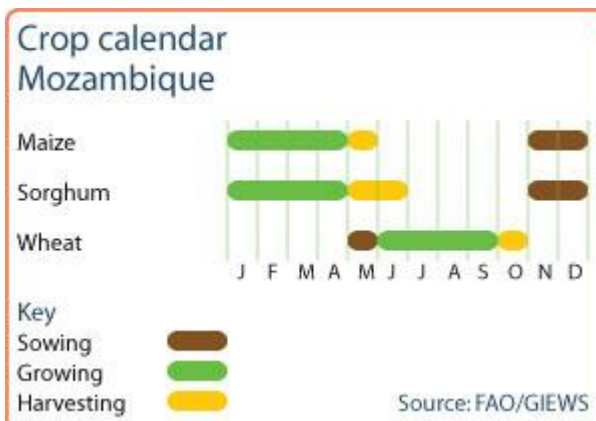
Good rainfall in most of the country, but some deficits observed in the far north

Planting of the main season's cereal crops is complete in most areas in southern and central provinces, and benefitted from favourable rainfall at the start of the 2010/11 agricultural season; however, agro-meteorological reports indicate that planting in central regions was delayed by about 10 days due to the late onset of rains. In northern provinces, where sowing began in the first dekad of December, rainfall levels have been mixed at the end of 2010, with deficits recorded in the far northern areas of Niassa as well as along the coastal strip of Capo Delgada and Nampula, while precipitation levels have been more favourable across the interior regions. At the start of 2011, substantial rains were observed in northern areas – helping to reduce early seasonal deficits – and in the Zambezi river basin, raising concerns about possible flooding in central Mozambique. The current high water levels of the Zambezi river have reportedly caused damage to some crops planted along the river bank.

For the 2010/11 season, the government continued the distribution of maize, rice, sorghum and soybean seeds through the Food Production Action Plan (PAPA), in efforts to support the agriculture sector and increase productivity. By the end of December the delivery of maize seeds was complete, but the distribution of other cereal seeds is still on-going. Input fairs, promoted by the provincial agricultural offices, further assisted in improving access and availability of seeds, farming tools and fertilisers to households. In addition, tractors and draught animals were provided to assist in improving productivity, mainly to northern and central provinces. Distributions of inputs by the government were augmented through contributions provided by FAO and NGOs.

Overall cereal production above average in 2010 but poor in southern regions

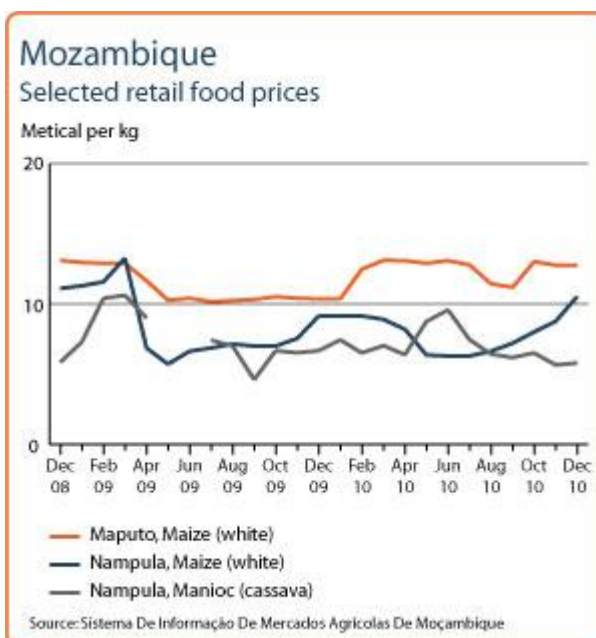
A joint FAO/WFP Crop and Food Security Assessment Mission (CFSAM) estimated that in 2010 national maize production declined by 3 percent from 2009's record level, to about 1.9 million tonnes, but still well above the average of the previous five years. The southern provinces experienced the largest decline, but at the national level this was partly compensated by the good production in three northern regions (Nampula, Niassa and Cabo Delgado). Rice production fell by more than 30 percent compared with last year, as a result of extensive



Mozambique Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Maize	1627	1932	1878	-3
Sorghum	351	378	384	2
Rice (paddy)	205	260	180	-31
Others	49	61	59	-3
Total	2232	2630	2501	-5

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



losses and yield reduction in central coastal areas due to the long dry-spell early in the season. Both sorghum and millet registered a slight increase in production over last year's level, attributed to an expansion in the area planted.

Maize price rising in the north and remain high in southern markets

In northern provinces, maize prices, which have been rising since the middle of 2010, continued along their upward trend in December while in the south prices have stabilized at high levels. The high prices in the north reflect seasonal trends and the strong demand from markets in southern deficit regions where production fell in 2010. As a result, the maize price differential between north and south has diminished markedly. In central markets, price movements vary, with relatively stable levels observed in Gorogosa (Sofala province) during the last quarter of 2010, while prices in Manica market have been rising sharply since June 2010, also attributed to the high demand, and at MZN 11.15 per kg maize prices are currently about three quarters higher than those recorded in the 2009 for the same month. By contrast, prices in southern markets, Chokwe and Maputo, have remained relatively stable, but at high levels, between October and December 2010.

In regard to rice, prices have been rising since May 2010 in Maputo, following a relatively stable period at the beginning of the year. The upward trend reflects the rising cost of imported rice, as a result of the depreciated metical and rising international prices from mid-2010. In December, the retail price of rice was recorded at MZN 30 per kg, 35 percent higher than prices in the same month in 2009.

Households in southern and central areas in need of assistance

Overall, the national food security situation is satisfactory. However, an estimated 350 000 people in southern and central areas from low-income and resource poor households are in need of food assistance, due to a combination of high food prices and production short-falls experienced in 2010. Resource constraints have caused a delay in food aid deliveries which, however, are expected to begin this month to meet increased needs during the lean season. Abundant rainfall in central areas has increased the threat of flooding in the Zambezi river basin, and although discharge rates from the Cahora Bassa Dam, in Tete province, have been reduced in January, the continuation of heavy rains could increase river levels further. In addition, the outbreak of foot and mouth disease in Gaza province, and the subsequent ban of livestock movements by the government, could have a negative impact on food security conditions, through limiting households' income from the sale of animals and impacting the use of livestock in cropping activities.

Reference Date: 13-September-2010

FOOD SECURITY SNAPSHOT

- Sharp decline in cereal production in the south, but national output for 2010 is still above average
- Decline in maize prices, reflecting the arrival of the harvest on the market, but prices in main urban areas remain high while households purchasing power is reduced
- Overall food security still satisfactory, but an estimated 250 000 persons will require assistance until the 2011 cereal harvest

Cereal production declines from record high, but still above average levels

The joint FAO/WFP Crop and Food Security Assessment Mission (CFSAM), conducted in May, estimated that national maize production declined in 2010 by 3 percent from last year's record level, to 1.878 million tonnes, but remained well above the average of the previous five years. The southern provinces experienced the largest decline, but at the national level this was partly compensated by the good production in three northern regions (Nampula, Niassa and Cabo Delgado). Rice production fell by more than 30 percent compared with last year, as a result of extensive losses and yield reduction in central coastal areas, due to the long dry-spell early in the season. Both sorghum and millet registered a slight increase in production over last year's level, primarily attributed to an expansion in the area planted. Other major crops - beans, groundnuts and cassava - performed satisfactorily, also showing some increase in the area planted.

The mid-season dry spell that affected large areas in the South, forced many farmers to replant their maize crops. However, support provided to farmers through the Government's Food Production Action Plan (PAPA) for the main season, assisted in preventing a more significant decline in cereal production, particularly in southern provinces. Furthermore, the Ministry of Agriculture (MINAG) provided farmers in vulnerable areas with increased quantities of seed (compared to previous years) for the second season, which aimed to compensate for the expected shortfall in the main-season harvest. This was further augmented by contributions from FAO and various NGOs. MINAG contributions consisted of planting material for field crops and a variety of horticultural crops.

Maize price double the level in the south compared to the north

Prices of maize grain began to fall in March across most of the country, but in Maputo, following a stable period between March and June, prices only started to decline in July. A large disparity in maize prices between north and south remains, reflecting the regional differences in production, high transport costs – despite recent improvements in infrastructure – and the burgeoning demand from the poultry industry. In August, the price of maize in Maputo (MZN 11.43/kg) was approximately twice as high as the price in Nampula (MZN 6.58/kg). Rice (the most consumed cereal in Maputo) prices have also risen by 33 percent between August 2009 and August 2010 in Maputo.

Crop calendar Mozambique

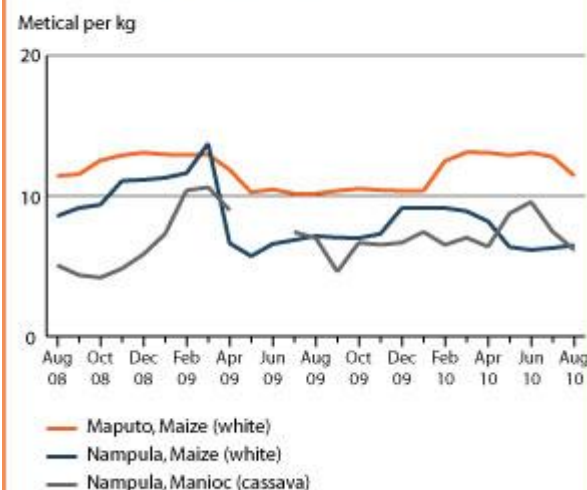


Mozambique Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Maize	1627	1932	1878	-3
Sorghum	351	378	384	2
Rice (paddy)	205	260	180	-31
Others	49	61	59	-3
Total	2232	2630	2501	-5

Note: percentage change calculated from unrounded data.
 Source: FAO/GIEWS Country Cereal Balance Sheets

Mozambique Selected retail food prices



The depreciation of the Metical against both the US dollar and South African Rand is also partly attributed to a general rise in cereal price levels (especially for wheat) over the past year. This, as well as the recent increases in global wheat prices, led the Government to raise the price of bread by 30 percent at the beginning of September. The measure, however, was revoked later in the month when the Government decided to maintain the price of bread through introducing a subsidy, after serious civil disturbances. In addition, the Government has introduced a more progressive tariff system for water and electricity charges, which will benefit low consumption households and will also promote the consumption of bread that includes cassava flour, which has lower production costs and retail prices.

Improved infrastructure could facilitate increased intra-regional trade

The opening of the new bridge across the Zambezi in August 2009 may have an increasing impact on the distribution of grain from areas of surplus production to those that are in deficit in the southern provinces. Another bridge across the Rovuma River has recently been opened between Cabo Delgado Province and southern Tanzania, which may enhance the flow of trade into and out of Mozambique's productive northern region. However, it is expected the maize deficit in the south will continue to be primarily covered by imports from South Africa. Overall, total cereal import requirements in 2010/11 marketing year are projected at 919 000 tonnes, slightly higher than the previous marketing year, mainly reflecting the reduced output of rice.

Overall food security outlook satisfactory but localized shortages expected in several regions

Overall, the national food security situation is still satisfactory. However, an estimated 250 000 people from low-income and resource-poor households in the semi-arid and arid areas of Tete, Gaza, Inhambane and Sofala provinces will require some 40 000 tonnes of emergency food assistance to meet their basic dietary requirements from August until the next harvest in March 2011.

In addition, if current high food prices persist in Maputo, Gaza and Inhambane provinces up to 50 000 more people may require food assistance from September onwards.

Reference Date: 11-March-2010

FOOD SECURITY SNAPSHOT

- Sharp reduction in 2010 cereal harvest anticipated due to severe drought in central and southern regions.
- Maize prices have started to rise in most areas reflecting the expectation of reduced supplies in the next marketing year.
- The number of food insecure people requiring assistance to increase sharply in the next year.

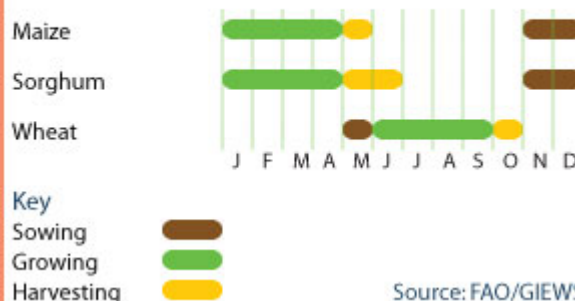
First assessments point to a sharp reduction in crop output in 2010

Planting of the main 2009/10 season's crops was completed in early December supported by seed and fertilizers distribution under the Government Food Production Action Plan (2008-2011). The rainy season started early in the North while in the Centre and South precipitations were not received until mid-November. Above normal rains up to mid-December favoured early crop development in most areas. However, a dry spell associated with high temperatures in south and central regions since mid-December have seriously affected the maize crop, while in the north favourable conditions continued. Heavy rains resumed in late January (causing severe flooding in the South) and continued throughout most of February, but were too late for early planted crops which were a write off in many areas. Some farmers have replanted crops for a third time when the rains resumed, but will only harvest a crop if rains continue unseasonably at least throughout March.

The Government has conducted a crop and vulnerability assessment in February and has reported that the prolonged dry spell has resulted in widespread crop losses in 55 districts in 7 provinces (Maputo, Gaza, Inhambane, Manica, Zambezia and the southern part of Tete) while the situation has remained favourable in Nampula, Niassa, Cabo Delgado and the northern part of Tete). Some 665 000 ha or 32 percent of the planted area to maize, sorghum, millet and rice (1st and 2nd plantings) in the 7 affected provinces have been lost. This is equivalent to 13 percent of the total cereal planted areas in the country for the 2009/10 cropping season. In 11 districts, losses are more than 60 percent, in 29 districts between 20 and 60 percent and in 15 districts up to 15 districts. The most affected provinces are Manica, Sofala, Gaza and the northern/western parts of Inhambane. A sharp reduction in cereal output from last year's record is expected, with as much as one quarter of the 2.9 million tonnes planned for 2010 lost. More precise information will be available after the 1st crop production forecast is completed in late March.

In an effort to make up part of the losses of the first (main season) the Government has announced plans to boost production of maize, wheat, beans, potatoes and vegetables from the second season plantings to start in April by providing seeds and irrigation pumps. It is also encouraging the production of drought resistant crops such as sorghum.

Crop calendar Mozambique

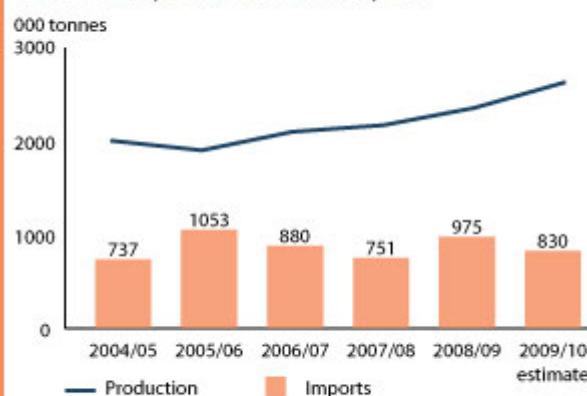


Mozambique Cereal production

	2004-2008 average	2008	2009 estimate	change 2009/2008
	000 tonnes			percent
Maize	1528	1709	1932	13
Sorghum	342	380	378	-1
Rice (paddy)	188	213	260	22
Others	48	53	61	15
Total	2107	2355	2630	12

Note: percentage change calculated from unrounded data. Source: FAO/GIEWS Country Cereal Balance Sheets

Mozambique Total cereal production and imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years. Source: FAO/GIEWS Country Cereal Balance Sheets

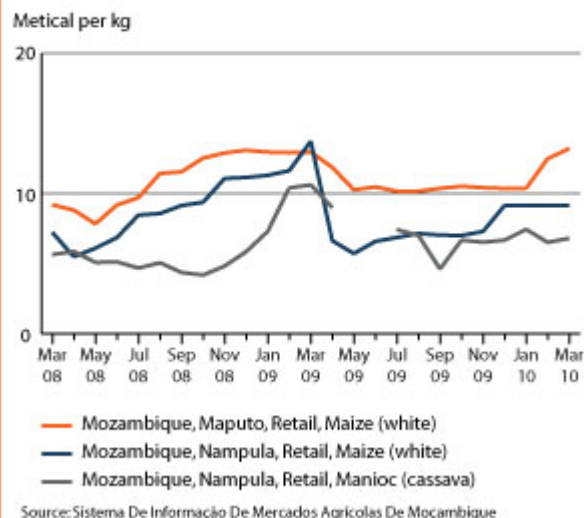
Maize prices rising in many areas reflecting expectations of reduced supplies

Retail prices of maize which had declined since March 2009 reflecting the good 2009 harvest, have remained relatively stable until late in the year. However, although current supplies in the markets remain ample, the expectation of a poor cereal crop this year has already led to some increases in several areas in recent months. In Maputo, for example, the retail price of maize in March was 26 percent higher than in January. In Nampula in the north, prices of maize have increased since late 2009 by 25 percent. In the centre drought affected areas, the rise in maize prices (not shown in the chart) was even more in Zambezia (Mocuba) and Manica (Chimoio) in the same period. These increases are higher than normal for this time in the year (lean period) reflecting the market expectation of reduced supplies in future months.

Overall food security outlook expected to deteriorate due to the poor crop output

The Technical Secretariat for Food Security and Nutrition (SETSAN) in its November 2009 update had projected a satisfactory food security until the next harvest in April for the majority of households in the country. However, in view of the expected sharp reduction in 2010 crop production SETSAN has revised in February the number of people requiring food assistance from April 2010 to March 2011 to about 460 000 from 281 000 estimated in November 2009. A more complete assessment will be conducted in April after the first crop estimates become available.

Mozambique Selected food prices



Reference Date: 1 February-2010

FOOD SECURITY SNAPSHOT

- Outlook for 2010 cereal harvest unfavourable over large areas of the country
- In 2009 a record cereal crop was harvested and imports needs in 2009/10 marketing year are lower
- Cereal prices have stabilized, but are still higher than last year
- Pockets of food insecurity remain in several areas

Prospects for 2010 crops unfavourable in central and southern areas

Planting of the main 2009/10 season's crops was completed in early December supported by seed and fertilizers distribution under the Government Food Production Action Plan (2008-2011). The rainy season started early in the North while in the Centre and South precipitations were not received until mid-November. Above normal rains up to mid-December favoured early crop development in most areas. However, a dry spell associated with high temperatures in south and central regions since mid-December have seriously affected the maize crop, while in the north favourable conditions continued. In the south and parts of the centre, crops have already wilted in some areas and farmers are attempting to replant. Crops in the central part of the country can still recover but a resumption of precipitations is urgently needed to avert permanent damage during the crucial flowering stage of the maize crop. Seasonal rainfall forecast for the January to March period indicate the probability of below-normal to normal amounts in the south and normal to above-normal amounts in centre and northern parts of the country.

Satellite based rainfall monitoring indicates that above average rains were received in the third dekad of January in most of the country but it may have arrived too late for most crops in the south. Satellite-based vegetation monitoring as of the showed about normal development in the north, but much below normal vegetation development in central and southern areas as of the end of January.

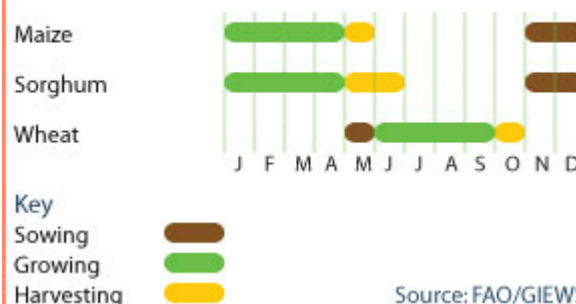
Record 2009 cereal production

Official estimates from the Ministry of Agriculture indicate that cereal production in 2009, harvested earlier in the year, increased to just over 2.53 million tonnes, representing an increase of 12 percent relative to the previous season's output. Despite this good output, the country has a structural deficit in wheat and rice. The food balance sheet for the 2009/10 marketing year indicates a total cereal import requirement of about 700 000 tonnes (mostly wheat and rice), some 11 percent below actual imports in 2008/09. These shortfalls are being covered mostly through commercial imports.

Stable, but above average prices restrict normal food access

Retail prices of maize have stabilized in recent months, but in Maputo in January 2010 they were still 28 percent above prices observed in January 2008. By contrast in Nampula in the north, prices of maize have been on the increase from the second half of 2009. In general,

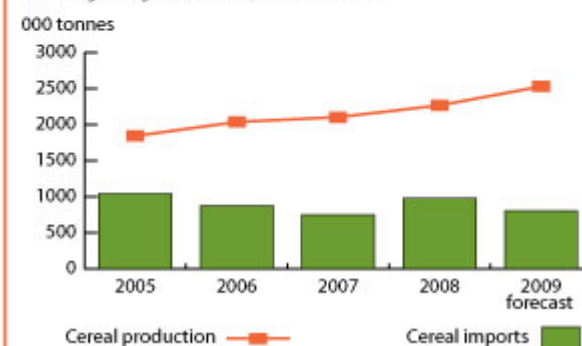
Crop calendar Mozambique



Mozambique Cereal production and imports

Cereal production	2004-2008	2008	2009	change*
	average		forecast	2009/2008
	000 tonnes			percent
Maize	1528	1709	1932	13%
Sorghum	342	380	378	-0.5%
Rice (milled)	123	127	173	36.8%
Other	47	53	48	-10.2%
Total Cereals	2041	2269	2531	11.5%

* Percentage change calculated from unrounded data.

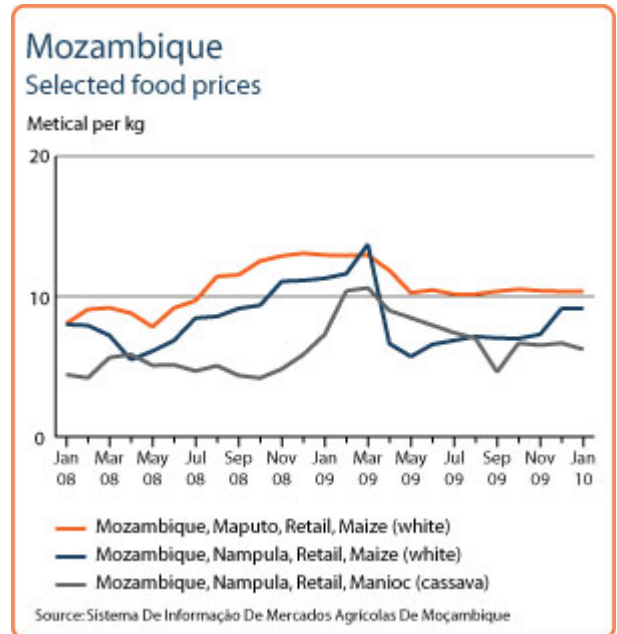


Source: FAO/GIEWS Country Cereal Balance Sheets

although maize quotations have fallen from their peaks in early 2009 mainly due to the good production in 2009, prices are still high and are limiting food access for poor households. Prices of the mostly imported rice in the capital remain high and were 13 percent higher in January 2010, compared to prices recorded last year in the same month and 55 percent above two year's ago.

Overall food security outlook still satisfactory, but pockets of insecurity remain

The Technical Secretariat for Food Security and Nutrition (SETSAN) in its November 2009 update projected a satisfactory food security until the next harvest in April for the majority of households in the country. However, a deterioration is possible if the current dry spell result in a poor 2010 cereal harvest. At present around 281 000 people in Tete, Inhambane, Gaza and Sofala provinces continue to require food assistance until the new harvest in April. WFP reports that they lack sufficient resources to assist all these populations and are calling for urgent mobilization of missing resources to avoid a break in the pipeline.



Reference Date: 20-January-2010

FOOD SECURITY SNAPSHOT

- Outlook for 2010 cereal harvest unfavourable over large areas of the country
- In 2009 a record cereal crop was harvested and imports needs in 2009/10 marketing year are lower
- Cereal prices have stabilized, but are still higher than last year
- Pockets of food insecurity remain in several areas

Prospects for 2010 crops unfavourable in central and southern areas

Planting of the main 2009/10 season's crops was completed in early December supported by seed and fertilizers distribution under the Government Food Production Action Plan (2008-2011). The rainy season started early in the North while in the Centre and South precipitations were not received until mid-November. Above normal rains up to mid-December favoured early crop development in most areas. However, a dry spell associated with high temperatures in south and central regions since mid-December have seriously affected the maize crop, while in the north favourable conditions continued. In the south and parts of the centre, crops have already wilted in some areas and farmers are attempting to replant. Crops in the central part of the country can still recover but a resumption of precipitations is urgently needed to avert permanent damage during the crucial flowering stage of the maize crop. Seasonal rainfall forecast for the January to March period indicate the probability of below-normal to normal amounts in the south and normal to above-normal amounts in centre and northern parts of the country.

Satellite-based vegetation monitoring as of the second dekad of January, show about normal development in the north, but much below normal vegetation development in central and southern areas.

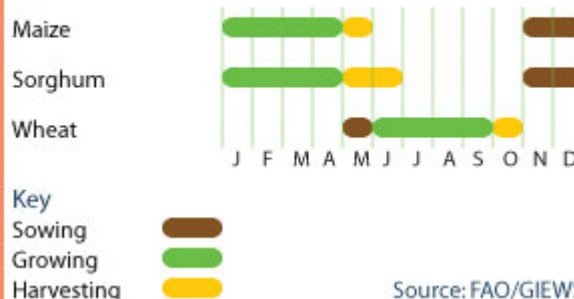
Record 2009 cereal production

Official estimates from the Ministry of Agriculture indicate that cereal production in 2009, harvested earlier in the year, increased to just over 2.53 million tonnes, representing an increase of 12 percent relative to the previous season's output. Despite this good output, the country has a structural deficit in wheat and rice. The food balance sheet for the 2009/10 marketing year indicates a total cereal import requirement of about 700 000 tonnes (mostly wheat and rice), some 11 percent below actual imports in 2008/09. These shortfalls are being covered mostly through commercial imports.

Stable, but above average prices restrict normal food access

Retail prices of maize have stabilized in recent months, but in Maputo in January 2010 they were still 28 percent above prices observed in January 2008. By contrast in Nampula in the north, prices of maize have been on the increase from the second half of 2009. In general, although maize quotations have fallen from their peaks in early 2009 mainly due to the good production in 2009, prices are still high and are limiting food access for poor households. Prices of the mostly imported

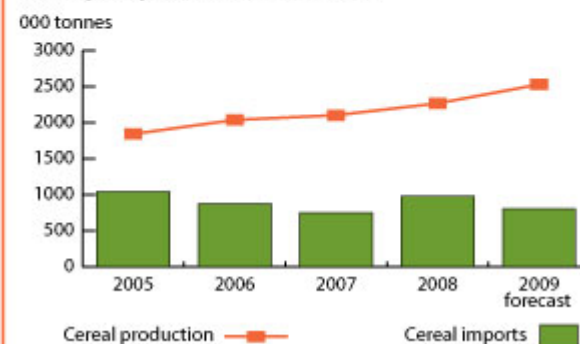
Crop calendar Mozambique



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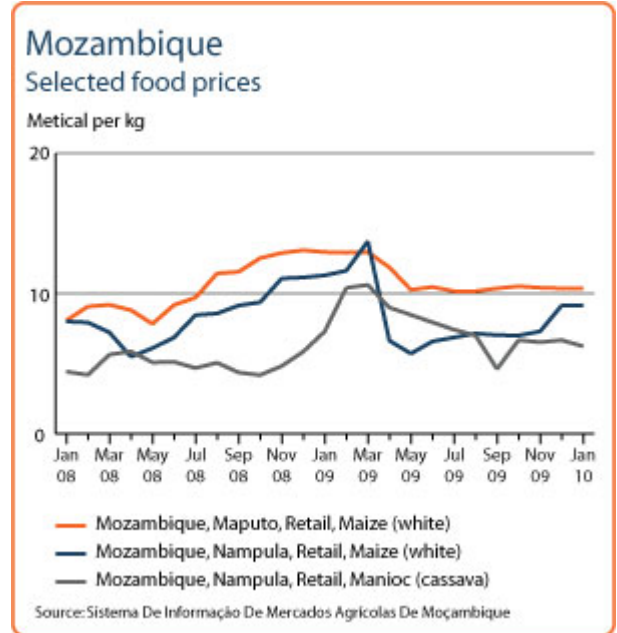


Source: FAO/GIEWS Country Cereal Balance Sheets

rice in the capital remain high and were 13 percent higher in January 2010, compared to prices recorded last year in the same month and 55 percent above two year's ago.

Overall food security outlook still satisfactory, but pockets of insecurity remain

The Technical Secretariat for Food Security and Nutrition (SETSAN) in its November 2009 update projected a satisfactory food security until the next harvest in April for the majority of households in the country. However, a deterioration is possible if the current dry spell result in a poor 2010 cereal harvest. At present around 281 000 people in Tete, Inhambane, Gaza and Sofala provinces continue to require food assistance until the new harvest in April. WFP reports that they lack sufficient resources to assist these populations and are calling for urgent mobilization of missing resources to avoid a break in the pipeline.



Reference Date: 6-January-2010

FOOD SECURITY SNAPSHOT

- Early prospects for 2010 cereal harvest mixed
- Due to a record cereal harvest in 2009 imports needs in 2009/10 marketing year are lower
- Cereal prices have stabilized, but are still higher than last year
- Pockets of food insecurity remain in several areas

Early prospects for 2010 crops mixed so far

Planting of the main 2009/10 season's crops was completed in early December supported by seed and fertilizers distribution under the Government Food Production Action Plan (2008-2011). The rainy season started early in the North while in the Centre and South precipitations were not received until mid-November. Above normal rains up to mid-December favoured crop development in most areas but a dry spell in the second part of the month has reduced soil moisture levels especially in central Mozambique. Satellite-based vegetation monitoring as of the first dekad of January, show below normal vegetation levels in north and central areas and about normal in the south. A resumption of precipitation is needed in the second half of January during the crucial flowering stage of the maize crop.

Record 2009 cereal production

Official estimates from the Ministry of Agriculture indicate that cereal production in 2009, harvested earlier in the year, increased to just over 2.53 million tonnes, representing an increase of 12 percent relative to the previous season's output. Despite this good output, the country has a structural deficit in wheat and rice. The food balance sheet for the 2009/10 marketing year indicates a total cereal import requirement of about 700 000 tonnes (mostly wheat and rice), some 11 percent below actual imports in 2008/09. These shortfalls are being covered mostly through commercial imports.

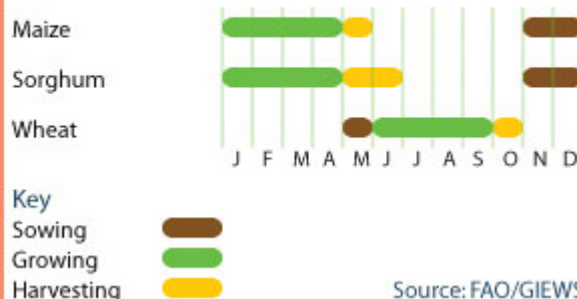
Stable, but above average prices restrict normal food access

Retail prices of maize have stabilized in recent months, but in Maputo in December 2009 they were still 34 percent above prices observed in December 2007. In northern Nampula, prices of maize have been on the increase from the second half of 2009. In general, although maize quotations have fallen from their peaks in early 2009 mainly due to the good production this year, prices are still high and are limiting food access for poor households. Prices of the mostly imported rice in the capital remain high and were 12 percent higher in December 2009, compared to prices recorded last year in the same month and 45 percent above two year's ago.

Overall food security outlook satisfactory, but pockets of insecurity remain

The Technical Secretariat for Food Security and Nutrition (SETSAN) in its November 2009 update projected a satisfactory food security until the next harvest in April for the majority of households in the country. However it estimated that around 281 000 people in Tete, Inhambane,

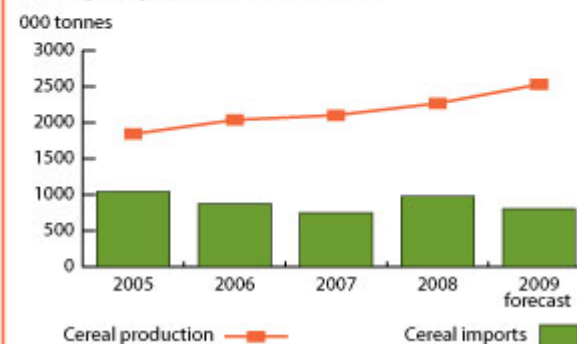
Crop calendar Mozambique



Mozambique Cereal production and imports

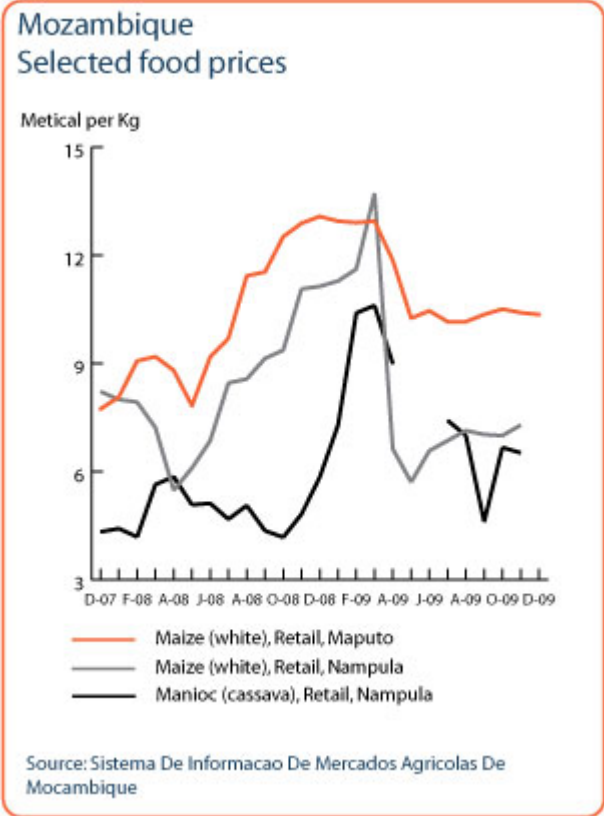
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Gaza and Sofala provinces will continue to require food assistance until the new harvest. WFP reports that they lack sufficient resources to assist these populations and are calling for urgent mobilization of missing resources to avoid a break in the pipeline.



Reference Date: 25-September-2009

FOOD SECURITY SNAPSHOT

- Record cereal harvest in 2009
- Cereal prices remain higher than average, but comparatively stable
- Pockets of food insecurity exist in semi-arid zones

Continued support towards agricultural growth

Land preparation is currently underway, with planting of the main 2009/10 season's crops scheduled to begin in November. The continued implementation of the Food Production Action Plan (2008-2011) by the Government is expected to provide further support towards cereal production growth. However, there are concerns that the occurrence of an El Niño dry-weather pattern during the end of 2009 could negatively affect the development of the season.

Record 2009 cereal production

Official estimates from the Ministry of Agriculture indicate that cereal production in 2009, harvested earlier in the year, increased to just over 2.53 million tonnes, representing an increase of 12 percent relative to the previous season's output. Despite this good output, the country has a structural deficit in wheat and rice. The food balance sheet for the 2009/10 marketing year indicates a cereal import requirement of 225 000 tonnes for rice and 440 000 tonnes for wheat. These shortfalls are expected to be covered by commercial imports.

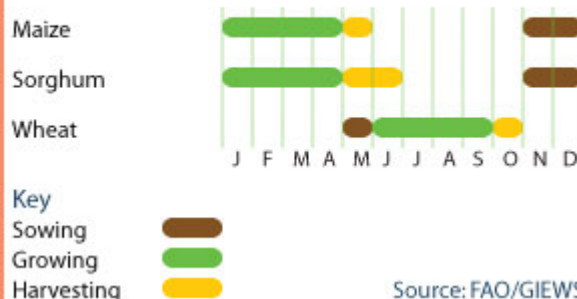
Stable, but above average prices restrict normal food access

Retail prices of maize in Maputo, for September 2009 have fallen by 8 percent compared to last year's level, but are 68 percent above prices observed in 2007. Although maize quotations have remained relatively stable over the last year, the above average price level is limiting food access for poor households. Additionally, prices of mostly imported rice in the capital were 17 percent higher in September 2009, compared to prices recorded last year in the same month.

Pockets of food insecurity remain, despite increased cereal production

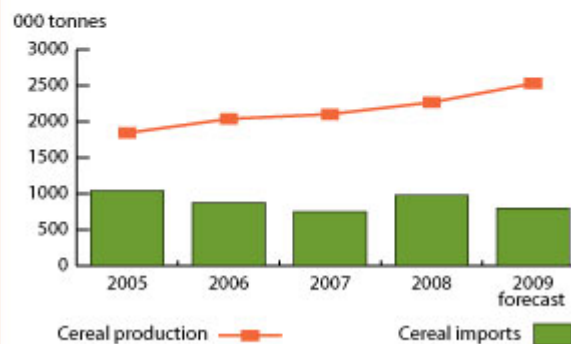
The overall food security in Mozambique is considered satisfactory. However, the Technical Secretariat for Food Security and Nutrition (SETSAN) estimates that 175 000 people in Tete, Gaza and Sofala provinces require food assistance until the subsequent harvest in May 2010. Additionally, an estimated 72 000 people in the southern provinces of Maputo and Inhambane will be in need of food assistance from October to April 2010.

Crop calendar Mozambique



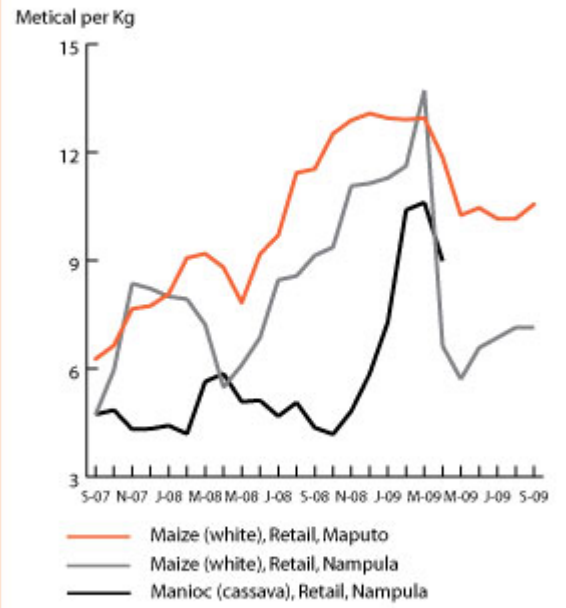
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Source: FAO/GIEWS Country Cereal Balance Sheets

Mozambique Selected food prices



Source: Sistema De Informação De Mercados Agrícolas De Moçambique