Swaziland Government

FOOD SECURITY UPDATE

JANUARY 2009. **Released February 2009**

HIGHLIGHTS

- **Mid-Marketing Year 2008/2009 population is projected at 1,067,920**

- **The maize production forecast for the current Marketing year stands at 61,995tons. A final estimate is yet to be released.**

- **The total cereal requirement for the 2008/2009 marketing year is estimated at 178,000 tonnes, while the Total Domestic Cereal Availability is 73,000 tonnes leaving a cereal gap of 111,000 tonnes.**

- **By the end of January, the projected cereal gap had been reduced to 41,000 tonnes following delivery of cereal imports (commercial and food aid) of 70,000 tonnes**

- **The preliminary forecast cereal requirement for the 2009/2010 marketing year is 166,000 tonnes. Total Domestic Cereal Availability (mainly maize) is forecasted at 72,000 tonnes.**

- **The overall domestic shortfall for the 2009/2010 marketing year is projected slightly lower; at 100,000 tonnes due mainly to the downward revision in total estimated requirements.**

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AGRO-METEOROLOGICAL CONDITION

a.) Rainfall

The month of January 2009 received much improved rainfall compared to the much below average rainfall that had been received in the previous months since the beginning of the season in October 2008 and even more worse in December 2008. These rains were in line with the seasonal forecast provided by the Meteorology Department in September / October 2008.

Most parts of the country experienced flash floods more especially in the western parts of the country where some fields were waterlogged leading to yellowing of some of the early vegetative crops due to suffocation.

The rainfall received in the season has been generally below average for the October-November-December 2008 period while this month has risen to above the long term average rainfall as seen on the graphs below (Figures 1 to 4).

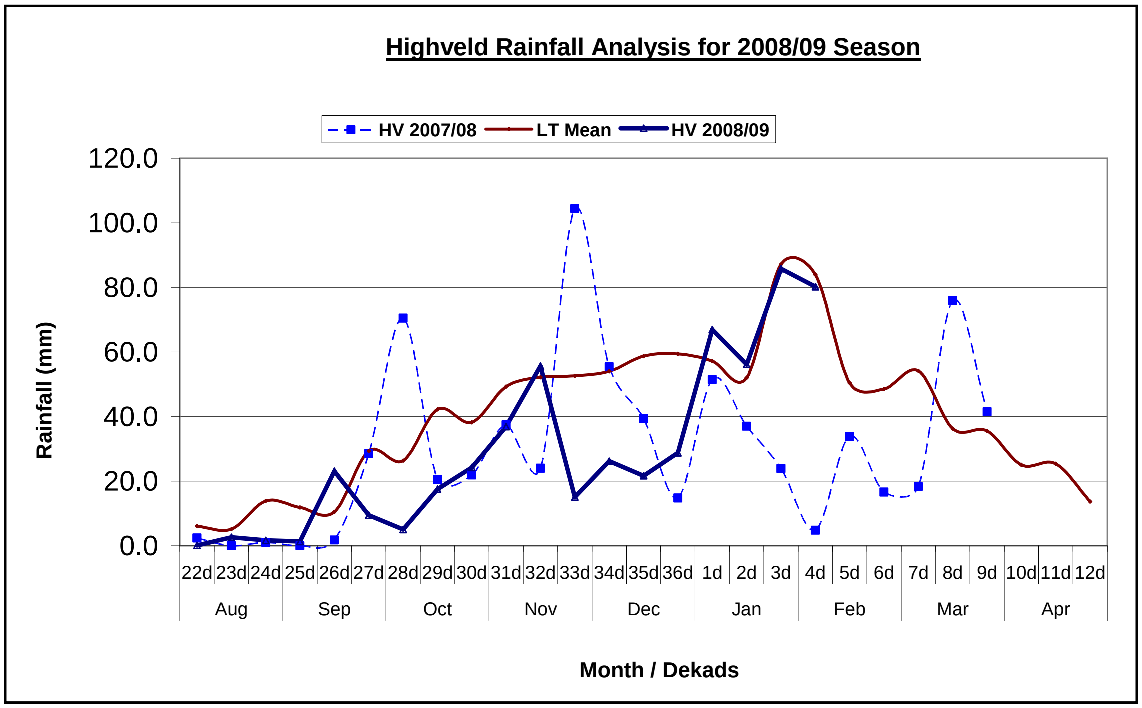

Figure 1: Highveld dekadal rainfall for the 2008/09 Season

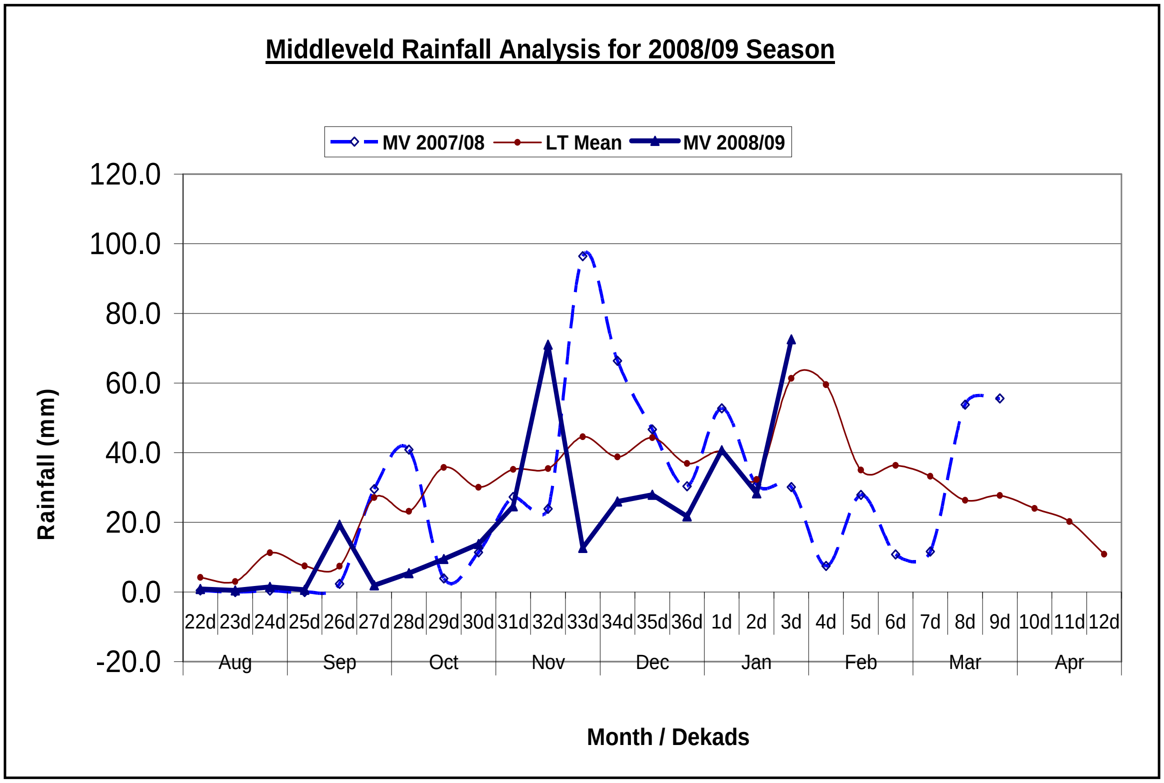

Figure 2: Middleveld dekadal rainfall for the 2008/09 Season

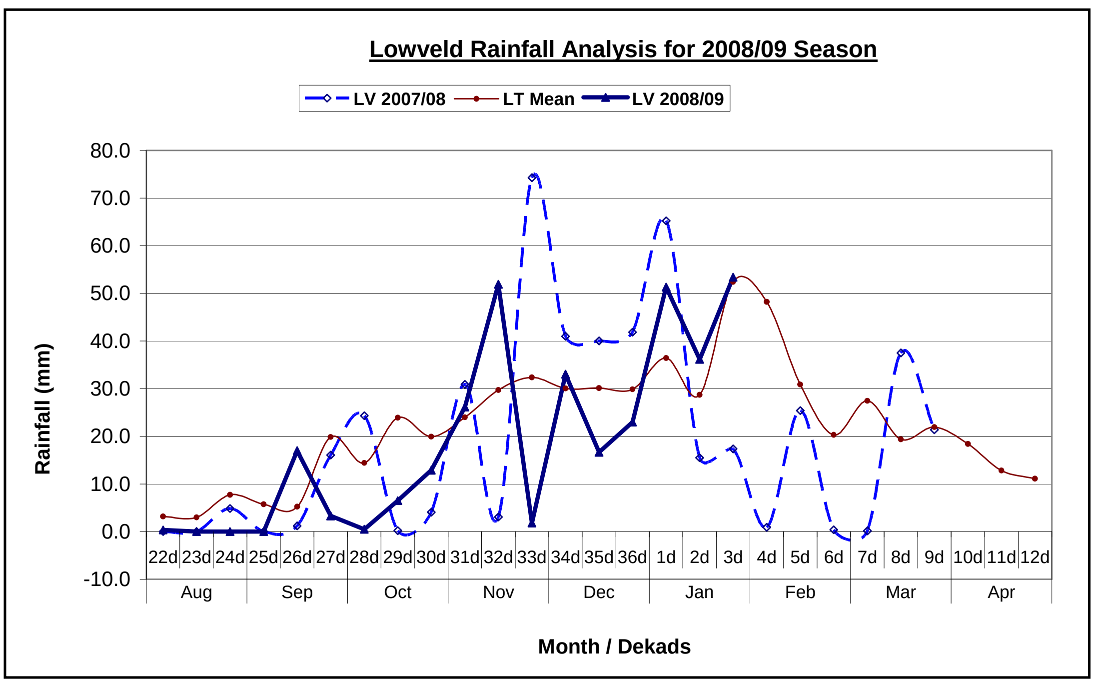

Figure 3: Lowveld dekadal rainfall for the 2008/09 Season

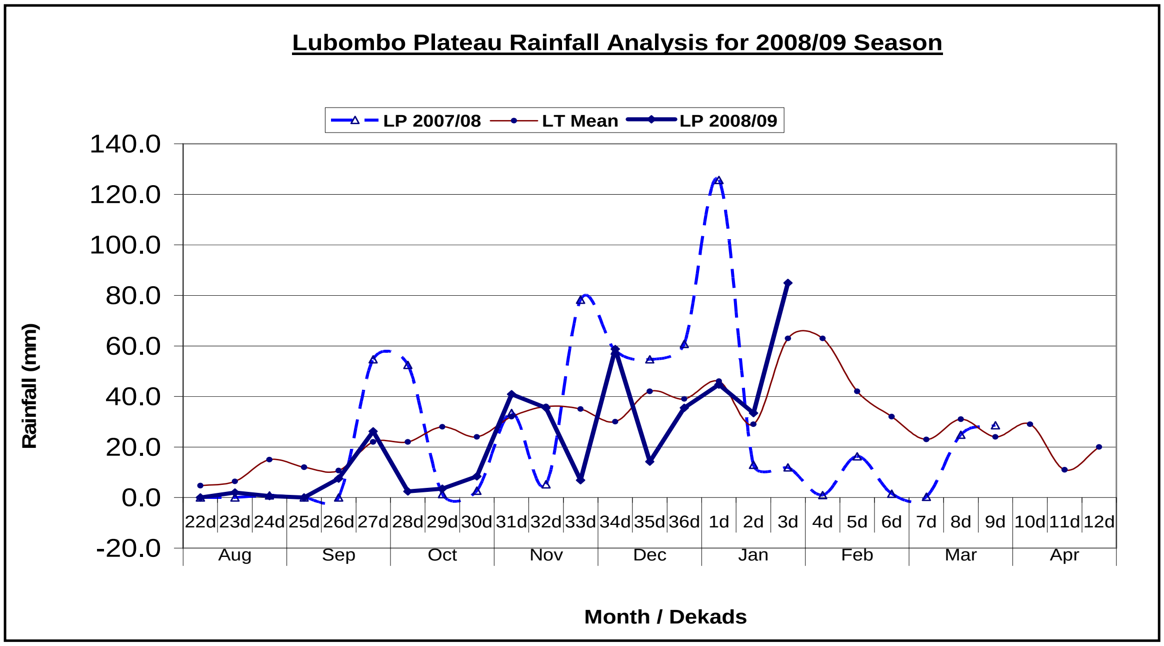

Figure 4: Lubombo Plateau dekadal rainfall for the 2008/09 Season

b.) Vegetation

There was a remarkable improvement on the vegetation status by the end of the month when compared to the beginning of the season in October and the end of December 2008, while some portions showed signs of poor vegetation patches (Image 1, 2 and 3 below). Generally this good vegetation ensured that all forms of livestock that rely on vegetation for fodder progressed well.

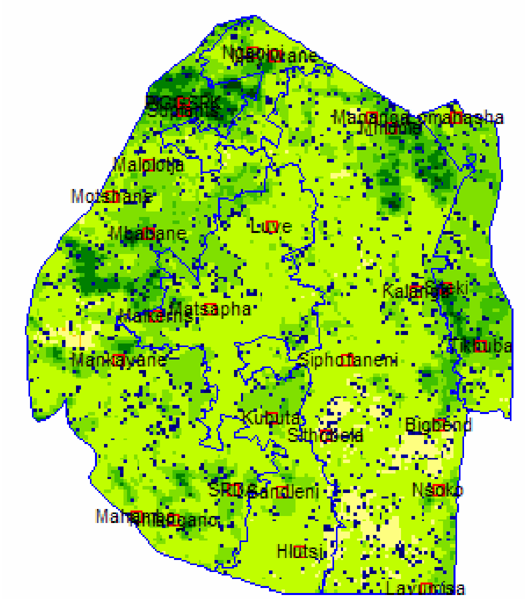

Image 1: 1st dekad October 2008 Vegetation status

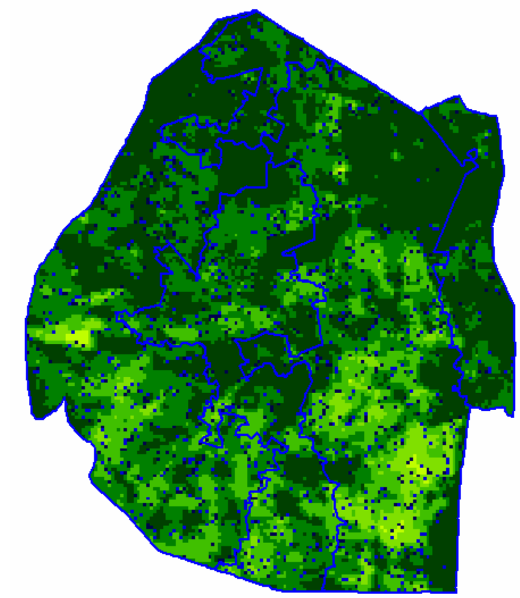

Image 2: 3rd dekad December 2008 Vegetation status

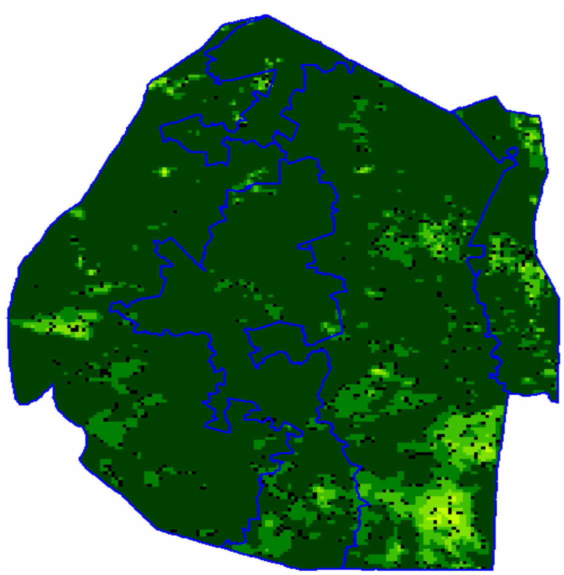

Image 3: 3rd dekad January 2009 Vegetation status

c.) Crop Situation

Most of the maize crop that was dry planted early in the season was found and reported to be flowering / tasseling and cobbing during the month of January with some already ripe and being consumed as green mealies. The condition of the crop was improving in the lower Lowveld and good in the Highveld and Middleveld agro-zones. The effects of stalk borer attack in December were not that significant as most farmers were able to treat their maize crops against the pest as soon as it was identified.

Other crops such as cotton were reported to be also doing well with most of the crop flowing with a few on ball formation stages. Community grown sugarcane was also in a good state. Leguminous crops were also reported to be planted but not in big areas when comparing to maize and cotton.

FOOD SECURITY SITUATION FOR THE 2008/09 MARKETING YEAR

2008/09 OVERALL CEREAL SUPPLY SITUATION

a) Total requirement

The total cereal requirement for the 2008/2009 marketing year[1] stands at **178,240tons.** Meanwhile, the Total Domestic Cereal Availability on the other hand is **72,495tons** (made up of a forecasted maize production of 61,995 tonnes and an opening stock of 2,500 tonnes).

b) Overall Domestic Shortfall/surplus

The overall cereal balance projects a domestic shortfall: Available domestic supplies are insufficient to cover the total requirement leaving a Shortfall of **111,408** tons.

c) Import Gap

Planned imports, at 101,000 tonnes are insufficient to cover the domestic shortfall. The Overall Import gap stands at **11,000tons** comprising of **10,000 tons** maize, and **1,000 tons** Wheat.

1. Marketing Year starts on 1st April and ends on March 31st of the following year.

d) Closing Stock as at 31st January, 2009

Stock levels as at 31st January 2009 stood at **1,000tons** of maize. Data on wheat and rice stock levels was unavailable.

MAIZE

a) Domestic Availability/Total Requirement

Total Domestic Maize Availability for the 2008/2009 Marketing Year is estimated at **64,495tons**, comprising of a production forecast of **61,995tons**, and an opening Stock of **2,500tons** held by the National Maize Corporation.

b) Domestic Shortfall/surplus

This Marketing year's Domestic Maize Shortfall is projected **54,513tons.** This is as a result of domestic availability of 64,495tons being insufficient to meet the Domestic requirement of **117,008tons.**

c) Planned and Received Imports

Planned Imports for the Marketing year are estimated at **44,000tons (40,000 tons commercial and 4,000 tons emergency food aid)** while total imports received during current Marketing year (as at the end of January) stand at **33,000tons** comprising of **29,000tons** commercial imports and **4,000tons** of food aid.

d) Uncovered gap

With planned imports of 40,000 tons, against an import requirement of 54,000 tons; there remains an uncovered gap of **10,000tons** that still needs to be filled if estimated maize requirements are to be fully met.

e) Current Stock as at 31st January 2009

The current stock for maize stands at **1,373tons** as at the 31st January, 2009.

f) NMC Local Procurements

A total **4.28 tons** has been procured by the NMC during the reporting month from local producers. This brings the total since May 2008 of locally procured maize to 2229.883 tons

WHEAT

a) Total Domestic Consumption and Requirement

The Total Domestic Wheat Availability for the 2008/2009 Marketing Year is estimated at **8,000tons**, comprising entirely of opening stocks held by the various millers. The Total Wheat Domestic Requirement for the country for this year is estimated at **46,732tons.**

b) Domestic shortfall/surplus

With domestic availability amounting to just 8,000 tons, against consumption requirements of 46,732 tons and a minimum operating stock requirement of 4,000 tons; a Domestic shortfall for the current marketing year is projected at 42,000 tons.

c) Planned and Received Imports

Planned Imports are projected at **42,000 tons** while total received imports for the Marketing Year stand at **23,000 tons.** Expected imports for the remaining season (February and March) stands at **19,000 tons.** It is unlikely that these will all be delivered within such a short time frame. Nonetheless the situation requires close monitoring.

d) Exports completed

Data for this month was not available.

e) Uncovered Gap

A small Uncovered Gap for Import stands of 1,000 tons is currently projected. However this may increase if outstanding imports fail to arrive as planned.

f) Current Stock as at 31st January 2009

The current stock for Wheat stands at **1,000tons** as at the 31st January 2009.

RICE

a) Domestic Availability

The Domestic Rice Availability for the 2008/2009 Marketing Year is estimated at **100tons,** comprising of production by local farmers.

b) Domestic Requirements

The Total consumption Requirement for rice is estimated to be **14,500tons**

c) Domestic Shortfall/Surplus

The Domestic shortfall for the current marketing year stands at **15,000tons** this is as a result minimal Domestic availability against **14,500tons** of Domestic Requirement plus the desired strategic carry over stock of **500tons.**

d) Imports Planned and Received

Planned imports for Rice stand at **15,000tons** while total received imports for the Marketing Year stand at **14,000tons;** these are only commercial imports. For the reporting month; commercial imports of **775tons** were received.

e) Uncovered Gap

Rice has no uncovered gap of for the Marketing Year.

ANNUAL CEREAL BALANCE SHEET

As at 31st January 2009

SWAZILAND
ANNUAL CEREAL BALANCE : 2008/09
MARKETING YEAR April - March)
Updated end January 2009

Thousands of Metric Tons	Maize	Wheat	Rice	Sorgh/ Millet	All Cereals	Cassava
A. Domestic Availability	**65**	**8**	**0**	**0**	**73**	**0**
A.1 Opening Stocks @ 1st April	**3**	**8**	**0**	**0**	**11**	**0**
Formal/SGR	3	8	0	0	11	0
On Farm	0	0	0	0	0	0
Other	0	0	0	0	0	0
A.2 Gross Harvest	**62**	**0**	**0**	**0**	**62**	**0**
B. Gross Domestic Requirements	**117**	**47**	**15**	**0**	**178**	**0**
C. Desired SGR Carryover Stocks	**2**	**4**	**1**	**0**	**7**	**0**
D. Domestic Shortfall/Surplus	**-54**	**-42**	**-15**	**0**	**-111**	**0**
E. Commodity Cross Substitution	**0**	**0**	**0**	**0**	**0**	**0**
F. Imports	**44**	**42**	**15**	**0**	**101**	**0**
F.1 Received	**33**	**23**	**14**	**0**	**70**	**0**
Commercial	29	23	14	0	66	0
Food Aid	4	0	0	0	4	0
F.2 Expected	**11**	**19**	**1**	**0**	**31**	**0**
Commercial	11	19	1	0	31	0
Food Aid	0	0	0	0	0	0
G. Exports	**0**	**0**	**0**	**0**	**0**	**0**
Commitments Shipped	0	0	0	0	0	0
Commitments Not Yet Shipped	0	0	0	0	0	0
H. Import Gap	**-10**	**-1**	**0**	**0**	**-11**	**0**
I. Forecasted Closing Stock	**0**	**3**	**1**	**0**	**0**	**0**
J. Current Stock @ 31 Jan 2009	**1**	**na**	**na**	**n/a**	**1**	**0**

PRELIMINARY ANNUAL CEREAL BALANCE SHEET: 2009/2010

The maize production forecast is estimated at 65,000tons; this is based on a 5% increase over last marketing year's forecast of 61,995tons. This assumption is made on the basis of the good rains experienced in January and February.

Total cereal requirement is forecasted at 166,000tons, this is a slight decline from that of the 2008/09 marketing year which was 178,000tons. On the other hand Total Domestic Availability is projected at 72,000tons which comprises mainly maize.

The Domestic shortfall is projected at 100,000tons, while imports and food aid are forecast to be 95,000tons; this translates into an estimated import gap of 5,000tons.

PRELIMINARY CEREAL BALANCE SHEET
2009/2010 Marketing Year

SWAZILAND
PRELIMINARY ANNUAL CEREAL BALANCE : 2009/10
MARKETING YEAR (April - March)
Mid year population - 1,067,920

Thousands of Metric Tons	Maize	Wheat	Rice	Sorgh/ Millet	All Cereals	Cassava
A. Domestic Availability	**67**	**4**	**1**	**0**	**72**	**0**
A.1 Opening Stocks @ 1st April	**2**	**4**	**1**	**0**	**7**	**0**
Formal/SGR	2	4	1	0	7	0
On Farm	0	0	0	0	0	0
Other	0	0	0	0	0	0
A.2 Gross Harvest	**65**	**0**	**0**	**0**	**65**	**0**
B. Gross Domestic Requirements	**112**	**39**	**15**	**0**	**166**	**0**
C. Desired SGR Carryover Stocks	**2**	**4**	**1**	**0**	**7**	**0**
D. Domestic Shortfall/Surplus	**-47**	**-39**	**-14**	**0**	**-100**	**0**
E. Commodity Cross Substitution	**0**	**0**	**0**	**0**	**0**	**0**
F. Imports	**40**	**40**	**15**	**0**	**95**	**0**
F.1 Received	**0**	**0**	**0**	**0**	**0**	**0**
Commercial	0	0	0	0	0	0
Food Aid	0	0	0	0	0	0
F.2 Expected	**40**	**40**	**15**	**0**	**95**	**0**
Commercial	35	40	15	0	90	0
Food Aid	5	0	0	0	5	0
G. Exports	**0**	**0**	**0**	**0**	**0**	**0**
Commitments Shipped	0	0	0	0	0	0
Commitments Not Yet Shipped	0	0	0	0	0	0
H. Import Gap	**-7**	**0**	**0**	**0**	**-6**	**0**
I. Forecasted Closing Stock	**0**	**5**	**1**	**0**	**0**	**0**
J. Current Stock @ April 2009	**0**	**na**	**na**	**n/a**	**0**	**0**

1. Food Security Issues

1.1 Maize Production

a.) LOWVELD

Currently 7500 ha is estimated to have been planted. The major seed varieties are SC403, RO413, CG4141, SC621 and Open Pollinated Varieties. 41% of the crop is reported to be at grain filling stage. Due to the rains experienced in January, there were problems of water logging and termites' infestation. The usage of fertilizer ranged from fair to good.

b.) **LUBOMBO PLATEAU**

The area planted is reported to be 4000ha, half of the crop planted is reported to be at the vegetative stage, and while 30% is at flowering stage, the remaining crop 20% is evenly distributed between emerging and grain filling stage. The major seed varieties used are SC403, RO413, SC405, PAN621 and local varieties. A good usage of fertilizer was reported.

c.) **MIDDLEVELD**

Area planted is reported to be 14,800 ha; this is a decline from normal conditions wherein during this period area planted could be above 23,000ha. The majority of the planted crop is at flowering stage, followed by vegetative and grain filling stages which are reported to be 18% and 16% respectively. The mostly used seed varieties are SC403, RO413, SC621 and open pollinated varieties (OPV's).

d.) **HIGHVELD**

The area planted in this region during this reporting period is estimated at 13,900ha.The majority of the crop planted is reported to be at the flowering stage, 46%, 27% of the crop is reported at grain filling stage while 18% is at the vegetative stage. The seed varieties mostly used are, SC403, RO413, SC621, PAN 6549 and OPV's.

1.2 Cotton Production

Farmers have been encouraged to engage in cotton production as a result of increases in price and the availability of a market. Government has now full ownership of the Sikhulile Cotton Ginnery at Big bend. The Ginnery is operational after a period of being idle, this has created a local market for cotton farmers and made it possible to access cotton locally; it is hoped this will stimulate cotton production in the country.

As of the current reporting period an estimated 1600ha is under cotton production mainly in the Lowveld and

Middleveld. The planted crop is at the flowering and boll forming stage. The main adverse effects the crop is facing are weeds, pests and diseases. The major varieties used are Delta Opal, Mavolo, CBB 95 and ALBACAL.

Cotton production has in the past suffered serious challenges that have nearly destroyed the industry. However Government support in the form of an annual injection of E1 million has facilitated the revival of the industry. Through the establishment of Credit Revolving Fund by the Cotton Board farmers were extended assistance in the form of pesticides and cotton seed.

Government has provided price support, the price schedule now is:

Table 1: Cotton prices/kg

	Previous price	Current price
GRADE HA	E2.55	E4.00
GRADE HB	E2.44	E3.80
GRADE HC	E2.27	E3.60
GRADE HD	E2.11	E3.40
BSG	E1.61	E1.80

Source: Cotton Board

1.3 Livestock and grazing

1.3.1 Grazing Areas

The good rain received has improved pasture conditions, grazing areas are in good condition.

1.3.2 Livestock

The current rains that improved the pastures have improved livestock condition. There has been improved water access for both livestock and human consumption. In all the regions there has been no need for supplementary feeding. In the Middleveld and Highveld a few animals were reported to have died from Black quarter and tick borne diseases. In all the regions no animals were reported to have died from lack of feed or water.

ANNEX 1
TERMINOLOGY

<u>Total Domestic Cereal Availability:</u> Opening stocks (monitored and unmonitored) plus gross domestic cereal production.

<u>Opening Stocks:</u> Carryover stocks held by marketing agencies, millers, on farm stocks (if available) at the beginning of the marketing year (April 1st).

<u>Gross Domestic Cereal Production:</u> Estimated or forecasted harvested production.

<u>Total cereal Requirements:</u> Gross consumption requirements plus closing stock requirement plus unofficial exports plus official exports commitments.

<u>Consumption Requirements:</u> Aggregated domestic consumption requirements (both food and non-food) over the full marketing year.

<u>Closing Stock:</u> Working stocks plus strategic reserves.

<u>Expected Exports:</u> Forecast level of exports over the marketing year including unofficial exports.

<u>Unofficial Exports:</u> Cross border trade, that is not planned and is unmonitored.

<u>Domestic Shortfall/Surplus:</u> Total domestic availability less total cereal requirements.

<u>Current Import Arrangements:</u> Sum of imports (commercial and food aid) so far received and still expected this year.

<u>Commercial Imports Received:</u> Quantities received by millers and/or marketing boards so far this marketing year.

<u>Commercial Imports Expected:</u> Quantities pledged for delivery in the current marketing year, but not yet received.

Food Aid Received: Quantities received by the World Food Programme, millers and marketing boards so far this marketing year.

Food Aid Expected: Quantities pledged by donors for delivery in the current marketing year, but not yet received.

After-Trade Deficit/ Surplus: Domestic Shortfall/Surplus plus current import arrangements (both commercial and food aid).

Estimated Closing Stock: Projected at the end of marketing year as national cereal stocks on the basis of current import/export arrangements.

Current Stock Level: Stocks of commodities held by marketing agencies, millers, merchants (and/or farmers, if available) at the end of the current reporting period.

ANNEX 2

PARTNERS IN THE NATIONAL EARLY WARNING SYSTEMS FOR FOOD SECURITY

National Meteorology Services (NMS)

Central Statistical Office (CSO)

National Maize Corporation (NMC)

Wold Food Programme

Ngwane Mills

National Agricultural Marketing Board (NAMBoard)

Chinese Agricultural Mission

Department of Agriculture and Extension (DAE)

Department of Veterinary Services (DVS)

Marketing Advisory Unit (MAU)

Home Economics Section (HES)

Grain Storage Section

Swaziland Cotton Board

National Disaster Task Force

Non Governmental Organisations (NGO's)

FAO

SWAZI VAC