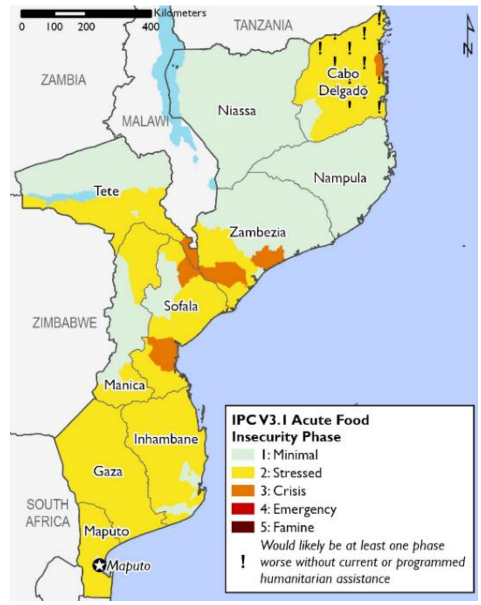
FEWS NET
Famine Early Warning Systems Network

Mozambique Food Security Outlook October 2023 to May 2024

Humanitarian needs in Mozambique likely to remain high in 2024 due to El Niño

Key Messages

Current food security outcomes
October 2023



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Source: FEWS NET

- From October to December 2023, most households in rural areas will continue facing None (IPC Phase 1) outcomes supported by food from the second season and post-flood production, food reserves from the main 2023 harvest, market food purchases, and normal access to income. Stressed (IPC Phase 2) outcomes will persist in most southern and central regions, but Crisis (IPC Phase 3) outcomes will likely emerge in the worst affected areas as El Niño induced dryness affects the area planted and the availability of agricultural labor activities. In 2024, Crisis (IPC Phase 3) outcomes will likely persist in the remote semi-arid areas of southern and central regions due to a likely below-average harvest, high food prices, and limited market access by the very poor households who will continue to engage in coping strategies to meet their food needs in the harvest period. In Cabo Delgado, the ongoing and planned distribution of humanitarian food assistance in secure areas will continue to support Stressed! (IPC Phase 2!) outcomes, with Crisis (IPC Phase 3) likely in more conflict-affected areas.

- In the September/October distribution cycle, the Food Security Cluster (FSC) partners assisted around 541,700 people across Mozambique with humanitarian food assistance (HFA), with around 244,270 people in Cabo Delgado receiving assistance. Additionally, nearly 57,830 people received support in recovering or strengthening their basic livelihoods across in Cabo Delgado province. Households received rations equivalent to 39 percent of their monthly kilocalories needs. In areas affected by tropical cyclone Freddy, around 199,240 people received HFA in September, primarily in Zambezia, Tete, Sofala, Gaza, and Inhambane provinces. For the first time, the anticipatory actions (AA) framework for drought was activated in Mozambique, targeting five districts in Gaza province. Under the leadership of INGD and with the support of several FSC partners, the framework aims to mitigate the impact of El Niño on rainfall and reach 150,000 people with AA activities.

- In September 2023, maize grain prices increased on average by 11 percent nationally. However, maize grain prices remained relatively stable in the Maputo and Maxixe markets, supported by above-average vegetable and maize production during the second season. However, prices in Montepuez, Cabo Delgado province, increased by 41 percent, likely driven by the decline of food stocks in Cabo Delgado. Maize grain prices in September 2023 were 13 to 86 percent higher than prices last year and 8 to 83 percent higher than the five-year average across monitored markets.

- From October to December 2023, strong El Niño conditions are expected to delay the start of the 2023/24 rainy season by around one dekad (10 days) with mixed performance, especially in southern and parts of central Mozambique. Irregular rainfall and reduced access to agricultural inputs will likely affect the area planted, affecting agricultural labor opportunities for poor households. Close monitoring of rainfall totals and distribution will be required to assess the severity of adverse impacts on cropping conditions for the 2024 harvest. There is particular concern for areas in southern and central Mozambique that experienced crop losses due to dry spells in 2023 and cyclones in 2022 and 2023. However, rainfall is expected to be cumulatively average to above average in northern Mozambique, supporting crop growth. Government and donors should prepare now for rising food assistance needs in 2024.

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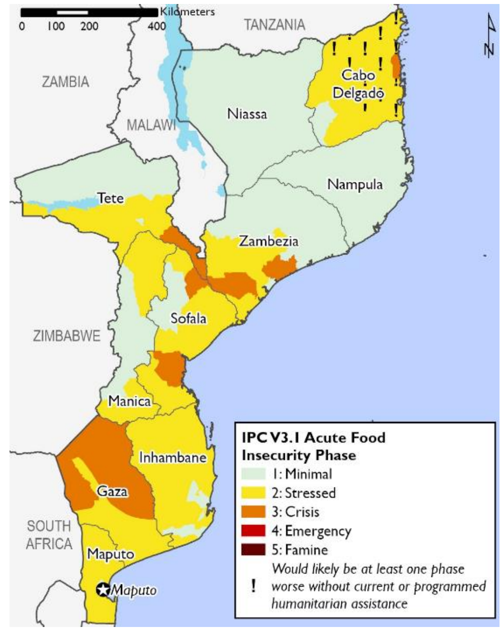
National Overview

Current Situation

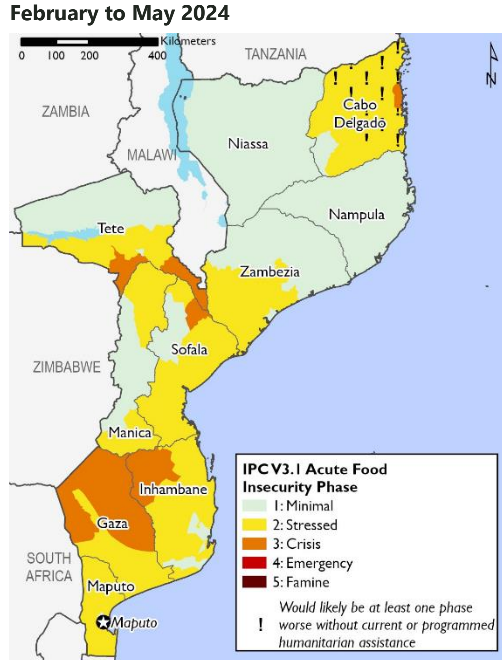
Start of the 2023/24 season. In mid-to-late October, southern and central Mozambique recorded moderate rainfall that supported land preparation for the upcoming 2023/24 rainy season. However, it is too early to determine whether these rains indicate an effective start to the rainy season, particularly with the ongoing El Niño. Most recent international and regional forecasts continue to forecast a strong El Niño in late 2023, likely resulting in an erratic start to the rainy season, particularly in southern and parts of central Mozambique. Close monitoring of rainfall totals and distribution will be required to assess the severity of adverse impacts on cropping conditions for the 2024 harvest. There is particular concern for areas in the south that experienced significant crop losses due to dry spells in 2023 and cyclones in 2022 and 2023. Government and donors should prepare now for rising food assistance needs in 2024. However, for the northern part of the country, forecasts indicate the possibility of normal to above-normal rainfall, which is expected to support crop production.

According to the 2020 Integrated Agrarian Survey (IAI), around 90 percent of households use saved seeds from the previous season for planting, particularly maize. Certified seeds are used by the remaining 10 percent of households and are often purchased or received from the government or humanitarian partners. In areas affected by climatic shocks in 2023, poor households likely lack sufficient seed stock to engage in the upcoming agricultural season effectively. However, households will likely try to borrow seeds from friends and family or purchase seeds through credit. I From October, government, international, and non-governmental organizations plan to distribute livelihood assistance in Cabo Delgado targeting agronomy, livestock, fisheries, small business grants, cash-for-work, and cash transfers to just over 530,000 people, around 20 percent of the population of Cabo Delgado. Around 416,200 beneficiaries will likely receive seeds and tools as livelihood assistance. Additionally, the anticipatory actions (AA) framework for drought was activated for the first time in Mozambique, targeting five districts in Gaza province. Under the leadership of INGD and with the support of several FSC partners, the framework aims to mitigate the impact of the expected below-average rainfall and reach 150,000 people with AA activities, including information dissemination, distribution of drought-tolerant seeds, cash transfers through an expansion of the national social protection program, conservation agriculture, and nutrition-sensitive actions.

Projected acute food security outcomes October 2023 to January 2024



Projected acute food security outcomes February to May 2024



Source: FEWS NET

Rapid food security assessment in semi-arid areas of southern and central Mozambique. In early September, FEWS NET conducted a rapid food security assessment in the semi-arid areas of southern and central Mozambique. These areas are typically affected by below-average rainfall during El Niño. Additionally, these two areas have suffered various shocks in recent years, including irregular rainfall, strong winds, and floods associated with tropical storms and cyclones that have resulted in crop losses, reduced agricultural labor opportunities, and decreased related income. In south and central Mozambique, the main 2023 harvest was severely affected by prolonged dry spells and high temperatures in December and January and subsequently by strong winds, heavy rainfall, and flooding due to Cyclone Freddy in February (South) and March

(Center). When Cyclone Freddy made landfall, most crops were in the maturation phase, just before the start of the harvest, which did not allow damaged crops to recover.

However, there was generally a very good second season and post-flood production following seed support from the government and its partners, along with the residual soil moisture from the receding flood waters. Additionally, continuous planting, whenever seed availability permitted, resulted in above-average second-season vegetable production. However, in much of the Chicualacuala district, parts of the Massangena district in the south, and the districts of Doa, Moatize, and Changara in central Mozambique, there was not sufficient residual moisture for post-harvest production following extensive wind damage from cyclone Freddy. Most poor households can meet their food needs but face difficulties meeting other non-food expenses, resulting in Stressed (IPC Phase 2) outcomes for most of the two zones. The exception is Doa district, in Tete, where the combined effects of shocks, limited income earning opportunities, and difficult access to markets are making it difficult for poor households to meet their food needs without engaging in coping strategies indicative of Crisis (IPC Phase 3) such as the consumption of less preferred foods, excessive consumption of wild foods, skipping meals or reducing meal sizes, restricting adult consumption so small children can eat, and borrowing food from relatives/neighbors.

Conflict areas of Cabo Delgado: According to ACLED, insurgent activity in Cabo Delgado has been low in October following an escalation of violence in the latter half of September. However, the number of nationwide conflict-related fatalities from the violence has decreased substantially since last year, while the frequency of armed clashes, attacks, battles, and other violent incidents declined by 73 percent in Cabo Delgado from January through August 2023. In September, most violence is concentrated in Chai and Quiterajo, while incidents in Muidumbe are spread throughout the district.

According to the United Nations International Organization for Migration (IOM), there are approximately 850,000 IDPs and 571,000 returnees as of August 2023. As security improved within the province, the number of IDPs decreased in many Cabo Delgado districts as they returned home. However, Cidade De Pemba continues to host around 138,000 IDPs, the largest share in the province. At the same time, the number of returnees in Palma and Mocimboa Da Praia has increased by 186 percent and 147 percent from November 2022 to August 2023, respectively. According to a rapid food security assessment in August, FEWS NET found that families mainly depended on their own food production, with IDPs largely dependent on humanitarian food assistance. The harvest of some crops produced in low-lying areas with sufficient moisture is ongoing, including vegetables and maize from the second season. Local markets remain well supplied, and the prices of most basic products are relatively stable, except for maize grain, which has been increasing. Many poor households are involved in income-generating activities to earn money for market purchases, particularly small businesses, such as selling food products, firewood, charcoal, and artisanal products, such as mats, sieves, and baskets.

Maize grain prices. From August to September 2023, maize grain prices increased by an average of 11 percent nationally. However, maize grain prices in the Maputo and Maxixe markets remained relatively stable, with prices slightly decreasing by 4 percent in Maputo. The above-average production of vegetables and some maize from the second season and post-flood

Figure 1 **Sale of charcoal and vegetables from the second season in Changara, Tete province (left); Sale of wild foods (dried Massanica and Malambe) in Changara (center); and Tomato harvested in Chigubo, Gaza province (right), September 2023**

Source: FEWS NET

production in the south may have contributed to the stabilization of prices in that region. However, in Montepuez, Cabo Delgado maize prices rose from 20.57 MZN/kilogram (0.32 USD) to 29.00 MZN/kilogram (0.45 USD) in September, around 40 percent. Here, the rapid depletion of food reserves in Cabo Delgado, combined with low production in the second season, may have contributed to the sharp increase in the price of maize in Montepuez. In most monitored markets, maize grain prices in September 2023 were around 15 to 85 percent above their respective levels last year. Exceptions include the Maxixe and Massinga markets in Inhambane province, where maize grain prices remained stable and 13 percent lower, respectively. Compared to the five-year average, maize grain prices in September 2023 are around 10 to 85 percent higher across all monitored markets. This year's high prices are likely driven by the cumulative impacts of multiple shocks over the past five years.

Prices of rice and maize meal. Rice prices remained relatively stable in most monitored markets from August to September 2023. Exceptions include price declines of 20 and 11 percent in Chókwe and Mutarara. Typically, monthly changes in rice prices occur in response to local supply and demand dynamics. Compared to last year, rice prices had a mixed trend, ranging from 20 percent lower to 14 percent higher than last year. Compared to the five-year average, rice prices in September 2023 ranged from 33 percent higher than the five-year average in Montepuez to 18 percent lower than the five-year average in Chókwe. However, maize meal prices remained stable in all monitored markets from August to September 2023. Maize meal prices in September 2023 remained stable compared to last year, except in some markets where prices increased by up to 11 percent. However, maize meal prices were up to 30 percent higher than the five-year average in most monitored markets.

Inflation. The annual inflation rate in Mozambique eased for the sixth straight month to 4.63 percent in September 2023, the lowest since January 2021. Prices moderated for housing & utilities, transportation, food & non-alcoholic beverages, and recreation & culture. On the other hand, steep increases were registered for miscellaneous goods & services, restaurants, hotels and cafes, and education. On a monthly basis, consumer prices went up by 0.34 percent in September, after four consecutive months of decreases, mainly underpinned by prices of alcoholic beverages & tobacco, restaurants, hotels and cafes, clothing & footwear, and food & non-alcoholic beverages. Looking at price inflation at a product level, Mozambique's National Institute of Statistics (INE) attributes the easing in price pressures to disinflation in the prices of tomatoes, lettuce, cooking oil, and onions. However, high staple food prices are keeping the cost of living high for most poor and very poor households, especially in areas affected by climate shocks or conflict where many poor households have limited income-earning opportunities.

Avian Influenza. On October 6, 2023, the Ministry of Agriculture and Rural Development (MADER), through the National Directorate of Livestock Development (DNDP), suspended the import of live domestic and wild birds, as well as poultry products from South Africa following the outbreak of bird flu in South Africa. News reports suggest that more than 45,000 hens have been slaughtered, burnt, and buried in southern Mozambique. Additionally, MADER/DNDP are restricting the movement of birds and poultry products in the Morrumbene district. The restriction on the importation of poultry products has resulted in the price of a dozen eggs rising from 100 to 180 MZN (1.57 to 2.82 USD). However, chicken prices on the national market have remained stable, although the poultry farmers' association anticipates increases in the coming months unless mitigation measures are taken. Recently, the government authorized the importation of hatching eggs and 4,000 tons of chickens from Brazil and Turkey to minimize the importation ban from South Africa. According to MADER/DNDP, the imports for Turkey and Brazil are expected to arrive in around a month. The rise in the price of eggs is likely reducing poor household access to an important source of protein, particularly in urban and semi-urban areas where egg consumption is part of the normal diet.

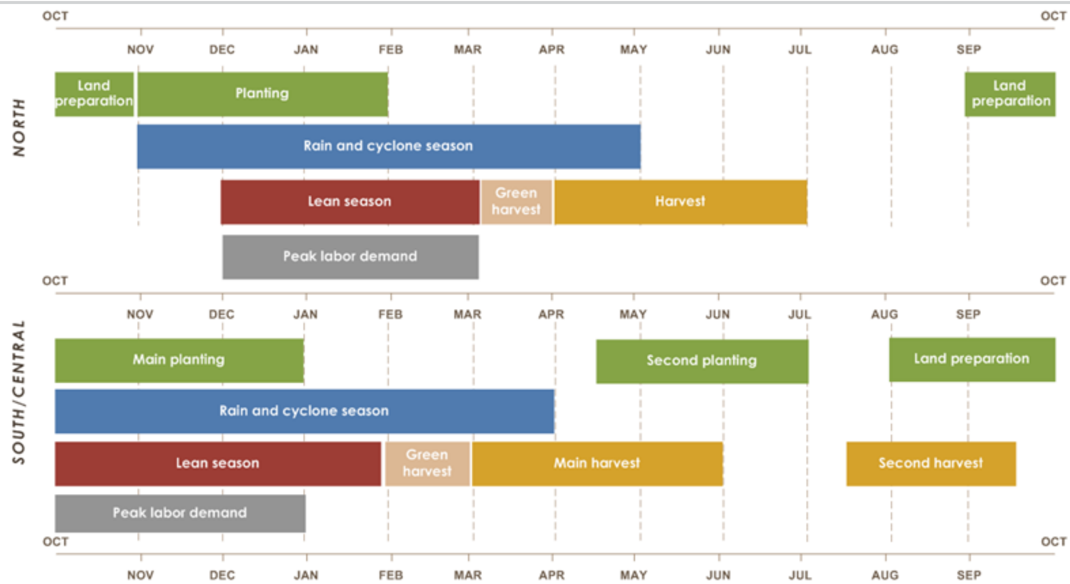
Humanitarian food assistance: In the September/October distribution cycle, the Food Security Cluster (FSC) partners assisted around 541,700 people across Mozambique with humanitarian food assistance (HFA), with around 244,270 people in Cabo Delgado receiving assistance. Additionally, nearly 57,830 people received support in recovering or strengthening their basic livelihoods across 12 districts of Cabo Delgado province. Four districts are already distributing assistance based on WFP-led Vulnerability Based Targeting (VBT) lists, with more districts expected to utilize the VBT lists in the next cycle. Households receive rations equivalent to around 39 percent of their monthly kilocalories needs, with close to 60 percent of HFA distributed as in-kind food assistance and the remainder distributed as cash-based transfers (CBT). In areas affected by tropical cyclone Freddy, around 199,240 people received HFA in September, primarily in Zambezia, Tete, Sofala, Gaza, and Inhambane provinces.

Current Food Security Outcomes

At the start of the 2022/23 agricultural season, most households in rural areas are facing None (IPC Phase 1) acute food insecurity outcomes supported by normal access to food from the second season and post-flood production, food reserves from the main 2023 harvest, and market food purchases. In most of the highland areas affected by shocks in 2023, where the second season is not typically or widely practiced, very poor households are intensifying their typical coping strategies indicative of

Stressed (IPC Phase 2), including selling more animals than usual, spending their savings, borrowing money or food, engaging in the production and sale of charcoal, or reducing spending on non-food items to buy food. Although most poor households continue to earn some income for market purchases of food from self-employment activities, the high cost of living limits access to non-food needs, driving Stressed (IPC Phase 2) outcomes in most areas of southern and central Mozambique. However, Crisis (IPC Phase 3) outcomes are ongoing in areas worst affected by shocks in 2023, where households have limited food stocks and income-earning opportunities. In these areas, the most vulnerable, very poor households, who have few or no livestock, little to no capacity to produce charcoal, and are unable to borrow, are likely facing Crisis (IPC Phase 3) outcomes and are engaging in consumption-based coping strategies such as skipping meals, reducing meal sizes, consuming less preferred food varieties, and increasing the consumption of wild foods to minimize food consumption gaps. In Cabo Delgado, the ongoing distribution of humanitarian food assistance is supporting Stressed! (IPC Phase 2!) outcomes, with Crisis (IPC Phase 3) in more conflict-affected areas.

Seasonal Calendar for a Typical Year



Source: FEWS NET

Assumptions

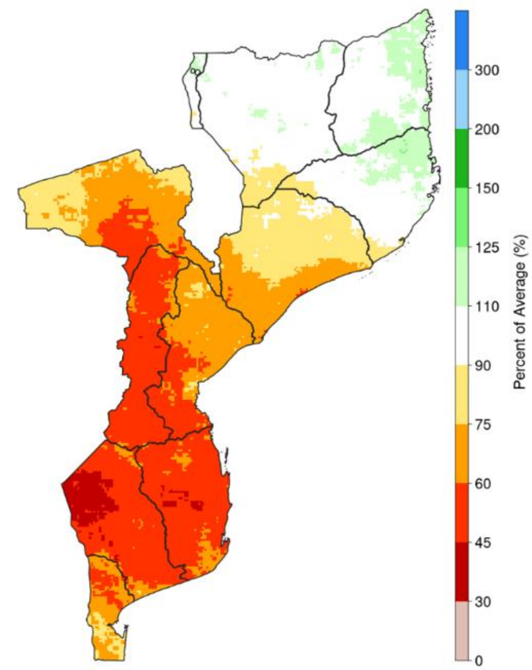
The most likely scenario from October 2023 to May 2024 is based on the following national-level assumptions:

- Climate forecasts suggest that El Niño is expected to be the dominant ENSO state through May 2024, with rainfall likely cumulatively below average in southern and central Mozambique and cumulatively average to above average in northern Mozambique based on historical trends (Figure 2). The start of the 2023/2024 main rainy and agricultural season is likely to be mixed, with rain expected to be delayed and erratic in southern and central areas. Above-average temperatures are also expected through May 2024, likely increasing crops and pasture evapotranspiration.
- Based on international and regional forecasts, between December 2023 and March 2024, there is an increased likelihood for an average to below-average number of cyclone strikes in Madagascar and Mozambique.
- Based on the rainfall seasonal forecast for the 2023/2024 rainy season, the National Directorate of Water Resources Management (DNGRH) projects a moderate to high risk of flooding across most river basins in Mozambique.
- An erratic start to the 2023/24 rainy season will likely delay planting and the timely availability of green foods, particularly in southern and central Mozambique.
- The 2023/2024 agricultural production is expected to be average in the high-production areas of northern Mozambique, much of Zambézia province, northern Tete, and parts of Sofala and Manica provinces. However, below-average production is

expected in parts of the central region and much of the southern region. Nationally, the 2024 harvest is expected to be below average.

- Poor households with inadequate seeds to effectively engage in the 2023/24 agricultural season are likely to try to borrow seeds from friends and family or purchase seeds through credit.
- Drought and high temperatures are expected to increase pest infestations and diseases, including Fall Armyworm (FAW), locusts, and rodents, further impacting household harvests.
- National food availability for the 2023/24 consumption year (April 2023 to March 2024) is expected to be close to average based on available official estimates and the national food balance. However, deficits are expected in areas where production was below average, including those affected by Cyclone Freddy, and in most of southern Mozambique, where food prices are likely to remain above average.
- Informal cross-border maize trade, particularly in southern Malawi, is expected to be above average, driven by high prices and increased demand. It is also likely that informal cross-border trade with Zimbabwe, particularly northeastern Zimbabwe, will increase due to the above-average demand.
- Wild food availability is expected to be slightly below average during the rainy season. It will further decline from April onwards, particularly in the semi-arid areas of southern and central Mozambique.
- FEWS NET price projections indicate that maize grain prices in the Maputo market are expected to continue to rise and remain well above last year's prices and the five-year average throughout the scenario period. The peak of the maize grain price is expected in April 2024, followed by a brief decreasing trend in May 2024 following the 2024 main harvest. It is expected that maize meal and rice prices, which generally remain relatively stable, may increase due to increased demand.

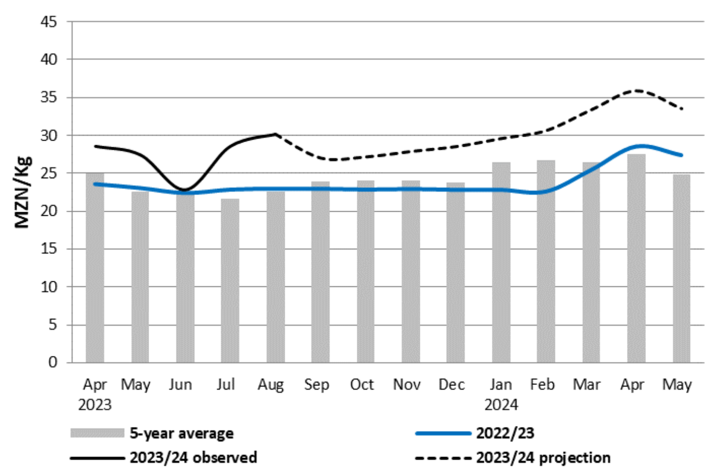
Figure 2 **Median rainfall in the December to February period of five strong El Niño events (1982/83, 1991/92, 1997/98, 2009/10, and 2015/16).**



Source: FEWS NET/USGS

- Pasture and water conditions for livestock will likely remain adequate during the October 2023 to March 2024 rainy season, even with below-normal rainfall in the southern and central regions, except in already dry areas of southern Tete province. However, pasture and water access will likely begin to deteriorate rapidly following the conclusion of the 2023/2024 rainy season, particularly in the semi-arid areas of southern and central Mozambique. Livestock body conditions will likely deteriorate beyond the scenario period.
- In northern Mozambique, agricultural labor opportunities are expected to be normal, except in areas affected by conflict where insecurity is likely to disrupt land preparation and planting. However, in most of southern Mozambique and parts of the central region, agricultural labor opportunities are expected to be below average as better-off households reduce the area planted due to erratic and cumulatively below-average rainfall. Very poor households will likely increase their engagement in self-employment activities to earn income for market purchases during the lean season. In the semi-arid regions of the south and center, most

Figure 3 **Maputo maize grain prices and projections (MZN/kg)**



Source: FEWS NET estimates based on MADER/SIMA data poor households will engage in the production and sale of charcoal, construction stakes, and firewood. However, increased competition is likely to limit access to income.

- Poor and very poor household members are likely to seek employment opportunities in casual labor and petty trade in urban centers or South Africa to earn income and send remittances back home, particularly following the end of the harvest in 2024.
- In Cabo Delgado, the distribution of humanitarian food assistance is expected to continue throughout the outlook period, with most beneficiaries identified through WFP's Vulnerability Based Targeting (VBT) process. Livelihood assistance, such as the distribution of agricultural inputs, is expected to occur from October 2023 to March 2024.
- With security operations ongoing and the rainy season set to resume from November to April, the frequency and intensity of Non-State Armed Groups (NSAG)-linked violence is likely to remain at depressed levels in the coming months as the group's operational capacity will likely by affected by weather conditions. There may be a short-term intensification of conflict in October and November before the conclusion of the dry season, with DNSAG and government forces conducting limited offensive actions before the rainy season. Small insurgent cells are expected to stage sporadic attacks against villages in central, coastal, and northern Cabo Delgado throughout the outlook period, while local and regional security forces are expected to continue to sustain ongoing joint anti-insurgency efforts despite separate controls and operations. The recent deaths of NSAG commanders will likely lead to a temporary increase in violent attacks as the group attempts to demonstrate NSAG's continued capacity and improve morale among militants.

Most Likely Acute Food Security Outcomes

From October 2023 to January 2024, Stressed (IPC Phase 2) outcomes will persist in most southern and central regions due to the depletion of food reserves, including second-season vegetables, below-average income generation opportunities, above-average prices, that combined will make access to food difficult. However, most households will still be able to meet their minimal food needs. As the year draws to a close, Crisis (IPC Phase 3) outcomes will likely emerge in the areas most affected by below-average rainfall, particularly in the semi-arid areas of the south and center of the country, where limited opportunities for income from agricultural labor and petty trade will limit household access to food. As the lean season continues, these poor households will likely begin engaging in more severe coping strategies such as withdrawing children from school unless meals are provided at school or sending household members to eat elsewhere. The poorest households, without livestock to sell and the ability to produce and sell charcoal, will likely intensify their engagement in coping strategies indicative of Crisis (IPC Phase 3). In November, the start of the rainy season in the central region is likely to increase agricultural labor opportunities. However, agricultural labor wages in weather-shocked areas are likely lower than typical due to middle and better-off households having lower-than-normal liquidity following below-average crop sales from the 2023 harvest. In parts of Zambézia, Tete, and Sofala provinces, areas most affected by tropical Storm Freddy are expected to be Stressed (IPC Phase 2) or in Crisis (IPC Phase 3) as households deplete their food stocks and continue to recover their livelihoods. However, limited access to seeds and agricultural inputs is likely to restrain agricultural labor opportunities and access to income during the lean season. In Cabo Delgado, conflict-affected areas will likely remain in Crisis (IPC Phase 3), with areas receiving humanitarian assistance expected to be Stressed! (IPC Phase 2!).

Between February and May 2022, poor households are expected to transition from the lean season to the harvest period. During this time, the availability of wild and seasonal foods, such as watermelon and pumpkin, and the start of the green harvest will help stabilize food access for poor households. However, in the remote semi-arid areas, Crisis (IPC Phase 3) outcomes will likely persist as poor households continue trying to expand their income-earning opportunities and increase coping strategies indicative of Stressed (IPC Phase 2) or Crisis (IPC Phase 3) outcomes to minimize food consumption gaps due to a likely below average green harvest. . In April and May, most poor families across Mozambique are expected to continue accessing green foods and food from the main harvest, improving their food access. However, in areas where the 2024 harvest is expected to be below average, such as areas where the recovery from past shocks has been slow or there was below-average rainfall due to El Niño, poor families will try to expand their income-earning opportunities and increase their engagement in coping strategies to minimize food consumption gaps. However, increased competition, lower liquidity among middle and better-off households, and high maize prices will keep poor household purchasing power low and limit market and food access, particularly in the most remote areas of semi-arid regions, resulting in area-level Crisis (IPC Phase 3) outcomes.

In Cabo Delgado, the expected ongoing return of IDPs to their areas of origin will likely pose short and medium-term challenges associated with shelter availability and access to labor, agricultural resources, and income-earning opportunities. However, acute food insecurity is likely to improve following increased engagement in the 2023/24 agricultural season, supported by average to above-average rainfall and lower levels of conflict. Additionally, increased access for humanitarian partners is likely to continue supporting Stressed! (IPC Phase 2!), while areas directly affected by conflict or at risk of further attacks by insurgents are likely to continue to face Crisis (IPC Phase 3) outcomes.

Events that Might Change the Outlook

Table 1 **Possible events over the next eight months that could change the most likely scenario**

Area	Event	Impact on food security outcomes
National	Average to above-average rainfall	Timely onset, well-distributed, and average to above-average rainfall would improve the start of the 2023/24 agricultural season and wild food availability. Increased access to wild foods will improve household food availability and consumption. Additionally, the rainfall would support near-average agricultural labor opportunities and improved pasture and water availability.
National	Severe flooding	Severe flooding from January to April 2024 would negatively affect poor households in the major river basins, particularly in the north and the coastal and Lower Zambezi and Limpopo rivers. Poor households would likely need food assistance for at least three to four months until the post-flood crops are harvested, beyond the scenario period.
Areas of concern	If production in the high-production areas is not good and traders do not respond to market demands	Local markets will be undersupplied, increasing food prices. Food access for market-dependent poor households will be more difficult, particularly in areas affected by shocks. Reduced market access will increase food consumption gaps among poor households.
Areas of concern	Inadequate humanitarian assistance	An inadequate response to humanitarian assistance needs in southern Mozambique will likely increase households' engagement in more severe coping strategies to minimize food consumption gaps. Additionally, there will likely be an increase in the prevalence of acute malnutrition.

Areas of Concern

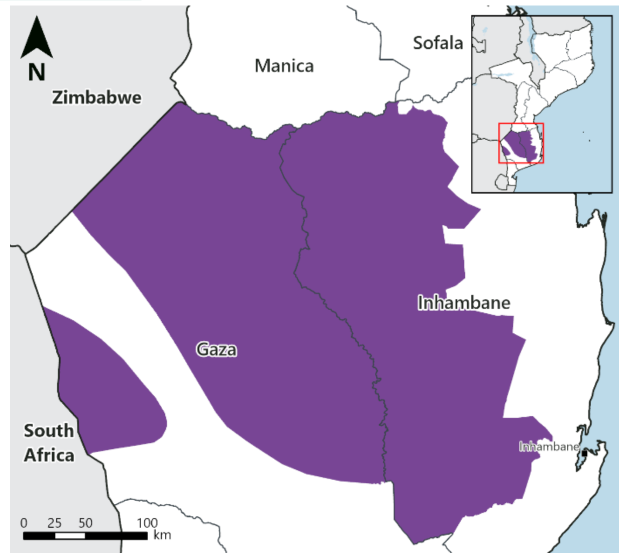
Southern Semi-arid Cereals and Cattle Livelihood Zone (MZ22) (Figure 4)

This area was chosen as an Area of Concern (AOC) following a consecutive poor harvest in 2023 and the likelihood of a third below-average harvest in 2024 due to the forecast El Niño.

Current Situation

Start of the season: In mid-October, moderate rainfall likely incentivized households to start preparing land for the start of the 2023/2024 agricultural season. However, during FEWS NET's rapid food security assessment in September, most households reported a lack of seeds for the upcoming season. Most households have not yet started planting as they wait for an effective start to the rainy season. However, erratic and below-average rainfall will likely discourage large-scale planting, with households opting for staggered planting whenever it rains.

Figure 4 Southern Semi-arid Cereals and Cattle Livelihood Zone (MZ22)



Source: FEWS NET

Pasture and Water. Pasture and water availability in October have remained at close to above-average levels, following good residual moisture from flooding in February and average rainfall from July to September. This is supported by the satellite-derived eVIIRS normalized difference vegetation index (NDVI), which shows that vegetation greenness is above the 2012-2021 average (Figure 5).

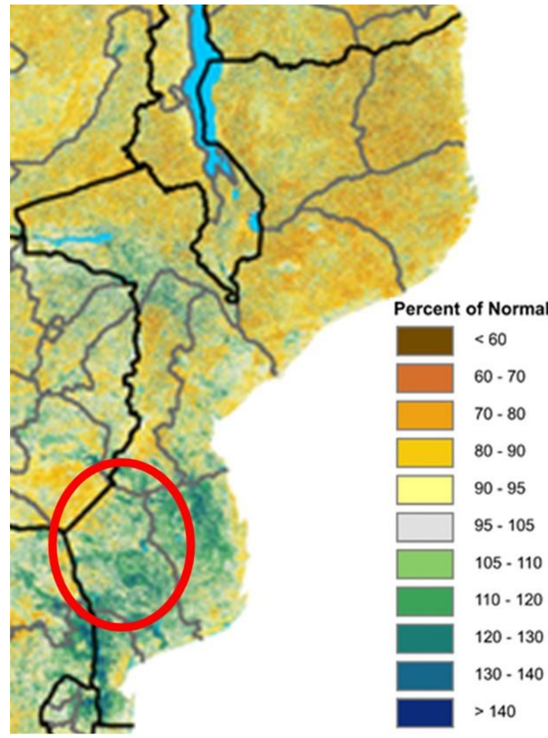
Household food reserves and access. Household food stocks are below normal following the below-average 2023 harvest. However, due to the above-average second season harvests of vegetables and some cereal crops, driven mainly by post-flood production, complemented with market purchases, poor households can meet their minimum food needs. However, the high cost of staple foods and increased competition for income-earning opportunities likely drive Stressed (IPC Phase 2) outcomes as poor households cannot afford their non-food needs.

Market Supplies from local sources are below average for this time of year, particularly staple foods (maize, cowpeas, and beans). During FEWS NET's rapid food assessment in September, local markets did not have maize grain sourced from outside the zone; however, this is expected to happen in the coming months as locally produced maize, which is currently available, becomes scarce. Other staple foods normally imported or processed, such as maize meal and rice, are available. Based on price data from Chókwe (the main reference market in the area), maize in September is retailing for 25.70 MZN per kilogram and has been stable since June. Maize prices in the Chókwe market are similar to last year and around 13 percent higher than the five-year average. Over the past five years, shocks have seen maize prices rise from around 8 MZN in 2014 to 25.70 MZN in 2023. In the remote interior areas of the zone, staple food prices are well above average compared to the Chókwe market, following the below-average or failed 2023 main season harvest. In these remote semi-arid areas where households do not engage in the second season, most households are turning to markets to purchase food if there is available income. The lack of maize grain in the markets increases demand for substitutes like maize meal and rice. However, maize meal prices have increased to 55 MZN per kilogram (0.86 USD) after retailing for 50 MZN per kilogram (0.78 USD) over the past five years, but rice prices have remained relatively stable at around 50 MZN per kilogram.

Agriculture labor and wages. The below-average 2023 harvest in the livelihood zone limited income from crop sales for middle and better-off households, resulting in lower-than-normal liquidity among middle and better-off households. Because the middle and better-off households have lower than normal liquidity, labor wages for very poor and poor households are below normal at the start of the 2023/24 agricultural season.

Self-employment and coping strategies. With the loss or reduced production of cereals, poor households are trying to expand their income-earning opportunities to buy food at the market. Currently, households are earning money from casual work and increasing their engagement in the production and sale of charcoal. Other sources of income include construction, handicrafts, collecting and selling firewood, thatching, cutting and selling construction poles, cutting and selling reeds (used in rural dwellings), and brewing beer or fetching water for the wealthiest households. However, increased competition for income is reducing sale opportunities and earning income. Poor households collect wild foods mainly for consumption and sale; wild food availability is close to average. Household access to income varies greatly in the livelihood zone, as the number of prospective buyers and proximity to markets tend to dictate prices. Poor households closer to trading centers typically can sell a bag of charcoal for 450 MZN (7.05 USD), but further away, the price can drop to 250 MZN (3.92 USD) or less. The amount of charcoal available for sale by each household varies from a few kilos to three to six bags to up to 50 bags or more. The quantity of charcoal obtained by each family depends on the labor available in the family and the availability of raw materials to produce charcoal, such as the availability of forest resources for this purpose - and that varies in different areas. Areas with no forest resources are leading households to migrate to areas with forest resources. Sales opportunities also make some families living in remote areas temporarily migrate to areas closer to the main corridors and with forest resources to be able to produce charcoal and sell it. These families often take a certain number of household members to help with the work. FEWS NET's qualitative assessment also determined that the quality of the charcoal is important. Additionally, household weekly income from charcoal sales can range from 0 MZN weekly to more than 10,000 MZN (~155 USD). Additionally, the rapid assessment indicated that few chicken sales are taking place, likely due to the availability of vegetables and income from charcoal sales.

Figure 5 **eVIIIRS normalized difference vegetation index (NDVI) compared to the 2012-2021 average, October 11-20, 2023**



Source: FEWS NET

Current food security outcomes: In October, the second season and post-flood production are largely helping to stabilize household food consumption. Most poor and very poor households can meet their minimum food needs but not their non-food needs and are likely Stressed (IPC Phase 2), while the worst affected very poor households are likely engaging in coping strategies indicative of Crisis (IPC Phase 3) to minimize food consumption gaps. FEWS NET's rapid assessment indicated that households are not excessively consuming wild foods, a typical coping strategy indicative of Crisis (IPC Phase 3) in the livelihood zone. However, wild foods like *macuacua*, *xicutsi* (roots of a local tree that are boiled with water and taken as tea), *tinhire*, and *Tinhlaru* are available.

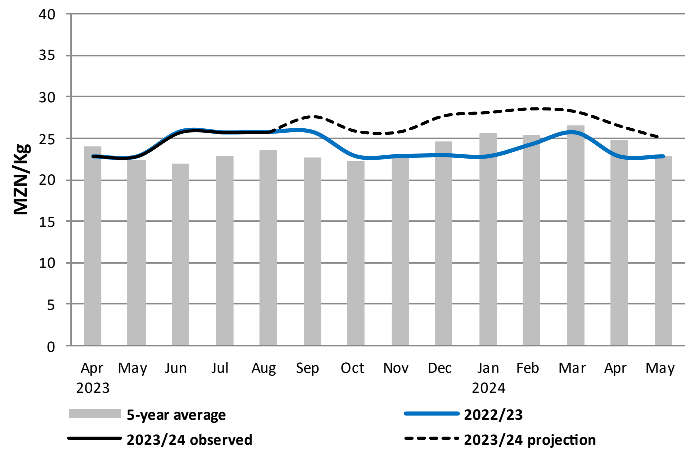
Assumptions

In addition to the national-level assumptions, the following assumptions apply to this area of concern:

- **Agricultural inputs**. Following multiple planting attempts over the past couple of seasons, poor households have exhausted much of their seed stocks and will likely face difficulties in accessing seeds for the 2023/24 agricultural season, contributing to less land being planted. Most farmers will likely use retained maize seed for planting, typically of poor quality and less resistant to pests and diseases. The planned distribution of seeds as part of the anticipatory actions against drought is expected to help minimize the lack of seeds but will not be sufficient to meet needs.
- **Pest infestations.** The two primary pests of concern are Fall Armyworm (FAW) and rodents. For the 2023/24 season, and with the prospect of suppressed rains due to El Niño, FAW will remain a major threat to maize and other crops in the livelihood zone. Additionally, rodents are typically a major pest during dry years. The government estimates that around 40 percent of production is lost to pests and diseases when control measures are not implemented on time.

- **Increased self-employment.** Poor households are expected to continue expanding income-earning opportunities throughout the scenario period. However, increased competition is expected to limit earnings. In a bad year, more families join the production of charcoal or involve more family members in other self-employment activities such as beverage production, sale of forest products, or even illegal hunting.
- **High maize grain prices**. Based on FEWS NET's integrated price projection, maize grain prices will remain higher than last year and the five-year average due to increased demand and lower-than-normal local supply (Figure 6). However, maize grain from the central zone is expected to meet market demand but be more expensive due to transportation costs passed onto the consumer.

Figure 6 **Chókwe maize grain prices and projections (MZN/kg)**



Source: FEWS NET estimates based on MADER/SIMA data

- **Above-average maize grain flows into the zone**. During the scenario period, informal and formal trade flows from the central region are expected to increase atypically to help make up zonal market supply shortfalls. However, maize grain market availability will remain below average as trade flows from the central zone will not be enough to meet consumer demand.

Most Likely Food Security Outcomes

From October 2023 to January 2024, most households will increase their engagement in agricultural activities. The start of the rains will also improve water access for households and their animals. The rains will also rejuvenate pasture, supporting livestock body conditions. In November, households are likely to begin staggering their planting following rainfall events, but seed availability will be a determinant factor for the extent of planting. However, the availability of agricultural labor activities will likely be delayed as households wait for an effective start of the rainy season. This will further constrain poor household access to income or in-kind payments earlier in the agricultural season. These poor households will continue to expand their income-earning opportunities for market purchases and increase their reliance on wild foods for consumption. However, increased competition will likely keep earnings below average, while high staple food prices keep household purchasing power low. As household market demand increases, local market food prices are expected to increase through January 2024; however, very poor households are likely to increase their engagement in coping strategies indicative of Crisis (IPC Phase 3) to meet their minimum food needs, particularly through the increased consumption of wild foods.

From February to May 2024, there will be a transition between the lean season and the start of the harvest in March and April 2024. However, the El Niño is expected to result in a below-average harvest, with crop failure expected in the worst affected areas. Most poor households will likely continue to try and expand their engagement in self-employment activities to earn income for food purchases from local markets. However, the high prices of staple foods, increased competition, and limited income earning opportunities will likely keep household purchasing power low. The poorest households living in remote areas with no livestock and where selling charcoal is difficult will increase their consumption of wild foods. However, increased demand and overconsumption are likely to limit wild food availability. Poor households are likely to increase their engagement in various coping strategies to minimize food consumption gaps, including reducing the frequency and quantity of meals, relying on less expensive foods, borrowing food from relatives or better-off households, and consuming less preferred and non-recommended wild foods in excess. From March to May 2024, the likely below-average harvest will stabilize household food access and lead to a short-term seasonal decline in food prices. However, market prices will rise as food stocks from the 2024 harvest decline earlier than normal. Most poor and very poor households in the rain-fed areas will likely have limited access to income and continue to increase their engagement in coping strategies indicative of Crisis (IPC Phase 3) or worse to minimize food consumption gaps.

Central Semi-arid Cotton and Minerals Livelihood Zone (MZ15) (Figure 7)

This area was chosen as an Area of Concern (AOC) as it was identified as an area likely to be most affected by the El Niño

Current Situation

The 2022/23 agricultural and rainfall main season was characterized by heavy rainfall in February and March 2023, accompanied by strong winds from Cyclone Freddy, which led to crop losses. In early September, interviewed key informants during a FEWS NET rapid food security assessment in Changara, Doa, and Mutarara estimated that the 2023 harvest was 30 to 40 percent below normal due to the damage from flooding and strong winds.

The heavy rainfall in February and March across the livelihood zone increased pasture and water availability for livestock, supporting pasture and water levels for goats and cattle from April through September. As a result, middle and better-off households with livestock did not have to travel long distances in search of pasture and water.

In early September, FEWS NET's rapid food security assessment determined that crops from the second season were still available, with most of the vegetables and tubers being sold in local markets and elsewhere for income. The households with access to seeds and lowlands with residual moisture, particularly on the small islands along the Zambezi River, were engaged in second-season production. The above-average rainfall in February and March increased the residual moisture needed for the second season. Second-season production was average to above average in lowland areas and areas with access to water for irrigation. Planted crops during this season were primarily vegetables, with some households planting cereals.

Figure 7 **Central Semi-arid Cotton and Minerals Livelihood Zone (MZ15)**

Source: FEWS NET

Food reserves at the household level in this livelihood zone typically last until October. However, most very poor households relied on market purchases in September to meet their basic food needs or consume wild foods, including the locally produced *malambe* (baobab fruit). Very poor households rely on their savings or producing and selling charcoal, bricks, handicrafts, artisanal mining, and chickens to earn income for market purchases. However, the few households that could harvest during the main harvest period had carryover stocks that likely lasted until August/September, with the best-off households who could engage in the second season likely to have food stocks that would last until December.

In Tete City, the major reference market for the livelihood zone, market food supplies are adequate. However, local market supplies are below average for this time of the year, particularly for staple foods such as maize grain, cowpeas, and beans. Other staple foods, usually imported or processed, such as maize meal and rice, are available. However, maize grain prices are high and are 46 percent higher than last year and 53 percent higher than the five-year average. Interviewed key informants reported that maize grain has been arriving late to the markets due to poor road conditions.

At the start of the 2023/24 agricultural season, middle and better-off households are planting less land than normal in anticipation of the impact of the El Niño on agricultural production and because they have lower-than-normal liquidity following below-average crop sales from the 2023 harvest. This is impacting agricultural labor opportunities and wages for very poor and poor households at the start of the 2023/24 agricultural season.

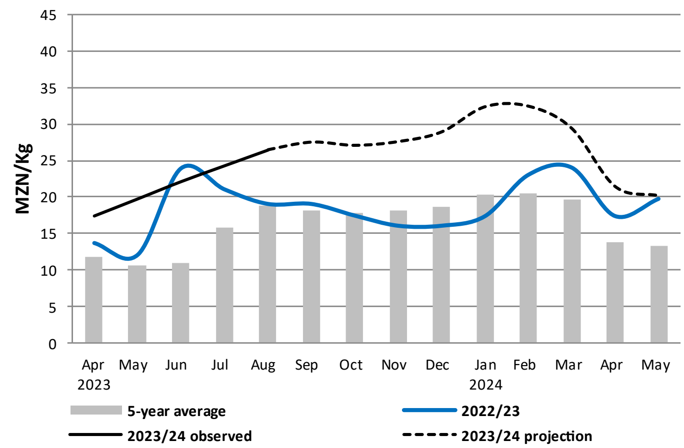
With the start of the lean season, very poor households are increasing their dependence on markets. Very poor households are expanding income-earning opportunities to earn income for market food purchases. Very poor households with animals, such as chickens, goats, or pigs, occasionally sell them for cash. Households are also earning income from casual labor such as construction, producing and selling charcoal, fetching water, making and selling bricks, brewing, thatching, cutting and selling construction poles, cutting and selling reed (used in rural housing), and handcrafting. The gathering of wild foods for sale, particularly baobab and *maçanica* fruits, is taking place wherever possible. However, with more and more people engaged in similar self-employment activities and reduced demand due to below-average income by middle and better-off households, very poor household earnings are lower than normal.

Assumptions

In addition to the national-level assumptions, the following assumptions apply to this area of concern:

- **Increase in the practice of self-employment activities**. As better-off households reduce the area planted due to erratic and cumulatively below-average rainfall, poor and very poor households are likely to increase their engagement in self-employment activities to earn income for market purchases during the lean season. Most poor households will engage in the production and sale of charcoal, the sale of baobab fruits, the sale of dry messianic, the manufacture and sale of bricks, and the sale of various vegetables. Increased competition is likely to limit access to income.
- **Abnormally high maize grain prices and below-average food access.** Based on FEWS NET's integrated price projections for the zone's reference market of Mutarara, maize grain prices will increase in November before peaking between February and March (Figure 8). The price of maize grain will remain above the five-year average throughout the scenario period. Maize grain prices will remain higher than last year and the five-year average throughout the scenario period. The high prices are likely to constrain very poor household access to food.
- **Above-average maize grain flows into the zone.** During the scenario period, informal and formal trade flows from the northern parts of the province are expected to increase to make up for zonal market supply shortfalls. However, local maize grain availability will remain below average through February 2024.
- **Below average livestock body conditions.** Although livestock body conditions are better than in other drought years, livestock body conditions are expected to be slightly below average due to poor pasture and below-average water availability. However, erratic and significantly below-average rainfall from December to March will likely result in more rapid deterioration of livestock body conditions as pasture and water access declines.

Figure 8 **Mutarara maize grain prices and projections (MZN/kg)**



Source: FEWS NET estimates based on MADER/SIMA data

Most Likely Food Security Outcomes

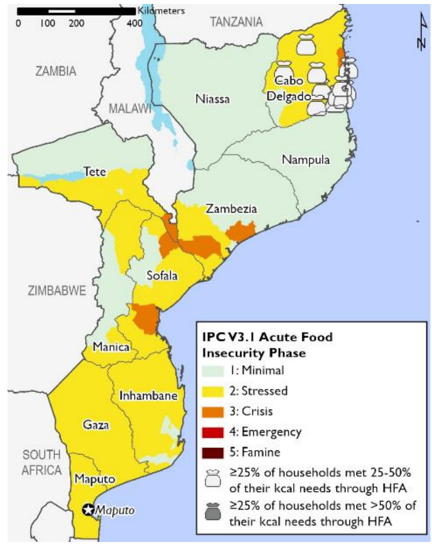
From October 2023 to January 2024, most poor households will primarily rely on market purchases for food while supplementing food access with any remaining food stocks. Very poor and vulnerable households who have exhausted their stocks and have limited or no income are expected to try and expand income-earning opportunities through self-employment activities. However, in parts of Moatize, Mutarara, Doa, and Tambara districts, poor households will likely have lower-than-normal income-earning opportunities from agricultural labor, which will be further impacted by erratic and delayed rainfall. Very poor households will likely begin expanding some of their coping strategies to meet their basic food needs and will not be able to meet their non-food needs. The start of the rains in November and December will provide seasonal water for humans and animals and increase pasture, improving livestock body conditions. As seasonal wild foods become available, they will help stabilize food access for most households in the livelihood zone. The start of the rains is likely to increase agricultural labor opportunities, but overall income is expected to remain below normal. Most poor households will also increasingly spend more time planting their own farms, reducing the available time to engage in self-employment activities. Overall, area-level Stressed (IPC Phase 2) acute food insecurity outcomes are expected from October to January, driving area-level Stressed (IPC Phase 2) acute food insecurity outcomes; however, the worst affected households are likely to be in Crisis (IPC Phase 3), especially in Doa.

From February to May 2024, the availability of green foods in March and the harvest in April and May is expected to gradually improve household food access despite a likely below-average harvest. However, in February and March, most households will likely continue to rely on expanding income-earning opportunities for market purchases for food while also engaging in typical coping strategies to minimize food consumption gaps, particularly in Moatize, Mutarara, Doa, Changara, Tambara, and Guro districts. Household access to income and their ability to engage in income-generation activities will be critical during this time, and poor households are likely to forgo key non-food needs during the peak of the lean season. As a result, area-level Stressed (IPC Phase 2) and Crisis (IPC Phase 3) outcomes are likely. As food becomes available at the household level in April, households will reduce their reliance on market purchases. Households will seek to try and earn income from crop sales or agricultural labor during the harvest period. The decreasing demand and the increasing supply from the local markets will help lower market prices in March, further facilitating better food access. Overall, the likely below-average harvest is expected to help stabilize household food access in the short term; however, food stocks for the 2024/25 market year are likely to be lower than normal.

Most likely food security outcomes and areas receiving significant levels of humanitarian assistance

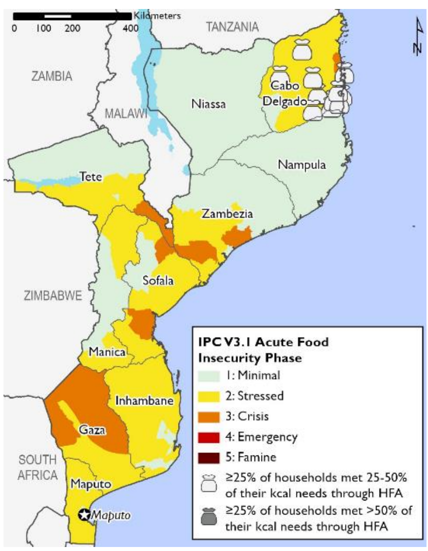
Each of these maps adheres to IPC v3.1 humanitarian assistance mapping protocols and flags where significant levels of humanitarian assistance are being/are expected to be provided. indicates that at least 25 percent of households receive on average 25–50 percent of caloric needs from humanitarian food assistance (HFA). indicates that at least 25 percent of households receive on average over 50 percent of caloric needs through HFA. This mapping protocol differs from the (!) protocol used in the maps at the top of the report. The use of (!) indicates areas that would likely be at least one phase worse in the absence of current or programmed humanitarian assistance.

Current food security outcomes, October 2023



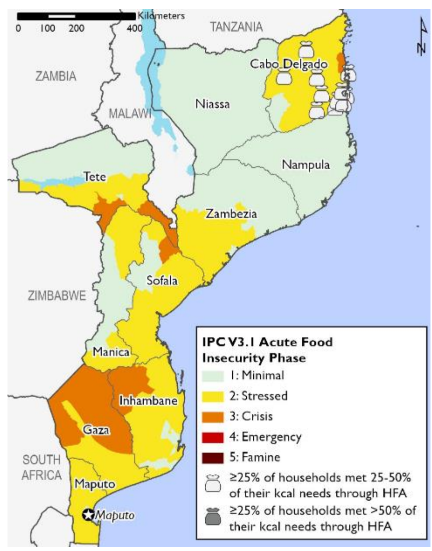
Source: FEWS NET

Projected food security outcomes, October 2023 to January 2024



Source: FEWS NET

Projected food security outcomes, February to May 2024



Source: FEWS NET

Recommended citation: *FEWS NET. Mozambique Food Security Outlook October 2023 to May 2024: Humanitarian needs in Mozambique likely to remain high in 2024 due to El Niño, 2023.*

About Scenario Development

To project food security outcomes, FEWS NET develops a set of assumptions about likely events, their effects, and the probable responses of various actors. FEWS NET analyzes these assumptions in the context of current conditions and local livelihoods to arrive at a most likely scenario for the coming eight months. Learn more here.