• Food security at the national level continues to be generally satisfactory, although there are some isolated pockets of food insecurity in areas that experienced drought conditions during the 2008/2009 agricultural season. These areas include the northern and northeastern pastoral areas and parts of the central zone (Figure 1).

• Food security conditions are improving due to increased availability of agricultural labor opportunities in unimodal and bimodal areas; government food aid distributions; the ongoing vuli harvest; and improved availability of green vegetables.

• Traders’ stocks and harvests of non-cereals continue to supply major markets across the country. In bimodal areas where the vuli rains started on time, crops have reached maturity stage and households have started harvesting and replenishing their food stocks. In other bimodal areas where vuli rains started late, green harvests have begun and are increasing the food security of market-dependent households. In unimodal areas, where rains started in November, green harvests are expected to start in March in the lowlands and in May in the highlands, and the main harvest is expected to start at the end of May.

• Although all markets are adequately supplied with food across the country, staple food prices have remained above the five-year average, constraining the ability of poor households to access food. The increased food crop prices are attributed to high transportation costs and diminishing household food stocks as the hunger season continues in unimodal areas, and vuli harvesting has been delayed in some bimodal areas following late planting. Cereal prices are expected to start decreasing when the green harvest peaks in March for early planted crops.

Seasonal calendar and critical events
Food security overview

Food security at the national level continues to be generally satisfactory, although there are some isolated pockets of food insecurity in areas that experienced drought conditions during the 2008/2009 agricultural season. These areas include the northern and northeastern pastoral areas, where milk production is still limited, and in the central zone, where the next crop harvest is not expected until May. However, food security conditions are improving following increased availability of agricultural labour opportunities in unimodal and bimodal areas; the government food aid distribution intervention; the ongoing vuli harvest; and improved availability of green vegetables.

Major regional and district markets across the country have adequate food supplies. Traders’ stocks and harvests of non-cereals (bananas, potatoes, fruits, and vegetables) continue to supply major markets across the country. In bimodal areas where the vuli rains started on time (Kagera, parts of Mara, and Mwanza regions), crops have reached the maturity stage and households have started harvesting and replenishing food stocks. In other bimodal areas where vuli rains started late, green harvests have begun and are increasing the food security of market-dependant households. In unimodal areas, where rains started in November, green harvests are expected to start in March in the low-lying areas and in May in the highlands, and the main harvest is expected to take place from the end of May through July.

In the pastoral areas of both bimodal and unimodal areas (Longido, Simanjiro, Monduli, Kiteto, Handeni, and Ngorongoro) food security conditions will remain stressed due to low milk production following animal deaths (mainly lactating and pregnant ones) during the August – November 2009 drought period. This situation is expected to start improving as cereal market supplies increase from unimodal and bimodal areas, which will most likely decrease food prices. Conditions will improve further in September/October 2010, when milk production returns to normal following the start of calving and improved pasture and water availability from vuli rains.

Government food aid distributions to food insecure households identified in localized areas of 63 districts by the Food Security Information Team (FSIT) during the August 2009 rapid vulnerability assessment (RVA) areas have continued. This has helped beneficiary households to work on their crop fields instead of working for cash or food, which improves food security prospects for these households.

In the northern and northeastern bimodal areas, which are occupied by pastoral, agropastoral, and crop farmers, vuli rains started late in some areas in October (they typically start in September), and as late as November in other areas. The start of vuli rains facilitated the return of pastoralists to homesteads, increased pasture and water availability, and improved animal body conditions. However these areas continue to experience food insecurity following persistent reduced milk availability and incomes from milk and animal sales. Livestock sales also are still low due to rebuilding of stocks. This situation continues to limit incomes of pastoralists and thus their access to food. Low milk production has most likely affected the nutritional status of the pastoral households especially in children under five years of age and pregnant mothers.

Crops (maize, beans, and sunflowers) in the northern and northeastern areas have reached maturity stage. The green harvest since January in some areas has reduced dependency of many households that had been sourcing food from markets. However, in some parts of Arusha, Kilimanjaro, and Tanga regions, there are some households who did not plant vuli crops due to consecutive failure of the vuli rains since 2007, these households will continue to source cereals from markets until the masika harvests expected in July. However, availability of agricultural labour opportunities and increased supplies from vuli and msimu harvests are expected to improve their food security conditions beginning in February.

The central regions in unimodal areas received heavy msimu rains that started in December and significantly facilitated agricultural activities, which has increased agricultural labor opportunities. Msimu rains have also improved vegetable availability and thus dietary diversity for many households. Pasture and water availability for livestock in these areas have also improved, improving animal body conditions, productivity, and pastoralist terms of trade. However, below-normal production in the previous season caused household stocks to remain below normal. Food security conditions of many households in the central region will therefore remain stressed until March when the green harvest is expected to start.

In the Lake Victoria zone, vuli crop (maize, beans) harvesting is ongoing in Kagera, parts of Mwanza, and Mara regions while in other areas (Shinyanga, parts of Mwanza, and Mara regions) it has reached the green stage. Although vuli rains have replenished food stocks at the household level, heavy and continuous rains have caused beans to rot and start germinating in the field, thus affecting both quality and quantity of bean production. This will affect both access to income
and access to a source of protein in bean producing areas, especially Kagera region. However, these heavy rains have facilitated moisture availability for the growth of coffee, bananas, potatoes, and cassava, which will improve incomes and food supplies starting in May. Cotton, a major cash crop in most part of the Lake Victoria zone, is providing agricultural labor opportunities (for weeding, spraying, fertilizer application, thinning) and hence income for casual labor dependent households. However in Kagera region, the continued spread of BXW disease is posing a threat to food security for households dependent on banana sales.

In mid-January, heavy rains caused localized floods in parts of Mpwapwa district (Dodoma region), Kilosa district (Morogoro region), and Ididi ward in Iringa district (Iringa region). These floods caused destruction of roads, bridges and railways limiting movement of food and people, washed out planted crops and displaced people from their homes. Crops that were planted in the valleys were swept away and others were submerged. Paddy field that were not yet prepared could not be cultivated, and some irrigation infrastructures were destroyed. However, for the early planted paddy, excess moisture will benefit crop growth. The government and non-governmental organizations are continuing to provide food aid and shelter to the affected populations in these areas.

In the Southern highlands (Iringa, Mbeya, Rukwa and Ruvuma regions), the main grain producers in the country, food security has continued to be stable and there are good msimu crop production prospects this season. The food security situation in Chunya district (Mbeya region) that was experiencing a food shortage from the previous msimu season has improved following good rains. The rains have increased the availability of vegetables, labour opportunities, and green harvests, which are expected at the end of February. However in the Rift valley areas of Iringa (Ismani and Ididi divisions of Iringa district), where rainfall has been erratic, crop growth is at different stages between knee high and tasseling and are showing moisture stress conditions posing localized poor crop production prospects. These divisions experienced crop failure during the last season; if the rains continue to be erratic, they will most likely experience localized food insecurity conditions.

The water level in lakes, rivers, ponds, and catchment areas has also improved, stabilizing production of hydroelectric power in Mtera, Kihansi, Kidatu, Hale and Nyumba ya Mungu dams which in turn enable sustainable power supply. This has increased industrial labor opportunities for casual labor dependent households in urban centers. Increased water levels have most likely increased exploitation of irrigation potential in river basins and increase water discharge in traditional irrigation reservoirs.

**Seasonal progress**

The performance of the 2009/2010 agricultural season so far has been mixed. In bimodal areas, some areas experienced an early onset and above normal rains as early as September 2009 that continued into January; however, other areas had a late start with rains in November. In unimodal areas, msimu rains begin in November, except in areas with a late start in December. Early onset facilitated early planting while late start of rains resulted in late planting, which has resulted in differing stages of plant growth. The erratic start and unpredictable rainfall performance have presented a challenge to most crop farmers and livestock keepers, who are solely dependent on rain-fed agriculture.

Normally January/February is an important period for the start of vuli harvests (maize, beans, potatoes, peas) in bimodal areas. These harvests also increase food supplies in markets. In Kagera region and Mara (mainly Tariime district), where vuli rains started on time (September), harvesting is ongoing. However, parts of Kilimanjaro, Tanga, Arusha, Mwanza, and Mara regions experienced a late start of vuli rains which led to late planting, thus prolonging the hunger period in these areas. However, the late planted crops have benefited from the unusual prolonged rains in January that provided soil moisture for crop growth. Harvests of late planted crops are expected at the end of February.

In bimodal areas in the Lake Zone (Mwanza, Mara, and Shinyanga regions) and many parts of northern and northeastern zone (Kilimanjaro, Tanga, and Arusha regions), land preparation for the masika season has started, facilitated by the dry spell. These agricultural activities are providing labour opportunities and incomes for continued sourcing of food and non food household needs in these areas.

In the central regions, ongoing weeding and fertilizer application are taking place for the msimu season crops. If the current dry spell continues beyond the second week of February, it will most likely negatively affect crops, especially maize, which is
at tasseling stage. However, the improved rangeland conditions in these areas have benefited animal body conditions and milk production.

In the southern coast regions of Lindi and Mtwara, weeding is taking place and crops are at different stages ranging from vegetative to grain filling stage. This is providing labour opportunities and thus income, especially for non-cashew producing households.

In the southern highlands (Iringa, Rukwa Ruvuma, and Mbeya regions), crops that were planted in areas with early msimu rains (November) have reached grain filling and are expected to be harvested in April, while in areas where the rains started late (end of December), crops are still at vegetative stage and will most likely be harvested in June. In the Rift valley areas of Iringa (Ismani and Idodi divisions of Iringa district), where rainfall has been erratic, crop growth is at different stages between knee high and tasseling, and are showing moisture stress conditions.

Armyworm outbreaks were reported in all regions earlier than normal (starting in January) and are still being reported. Although outbreaks were reported to be high, their impact on crop production so far has been minimized by early intervention by the government through timely reporting and chemical distribution.

Markets and trade
All markets are adequately supplied with food across the country. However prices have remained above the five-year average. High prices are attributed to high transportation costs resulting from high fuel prices. Currently the surplus sources (mainly the southern highlands) are far from the deficit areas mainly in the central, northern, and coastal areas. High food prices are also due to depletion of food grain stocks at the household level in unimodal areas as the hunger season continues. Cereal prices are expected to start decreasing when the green harvest peaks up in March for early planted crops.

Although maize prices have increased in most markets across the country, the availability of agricultural labour activities in both unimodal and bimodal areas is increasing household income. Due to the good crop prospects, prices are expected to start decreasing in April as traders clear stocks for the next crop. Rice prices have also increased in most markets across the country. While irrigated rice is continuing to feed markets, the main seasonal rainfed rice crop harvest is expected in June. Therefore rice prices are likely to remain high until the start of the rainfed rice harvest.

Bean prices have also increased in most markets across the country. There has been reduced bean supply from both msimu and vuli seasons following heavy rains that continued into January, thus keeping prices high. Improved supply and reduction in bean prices are expected in June when the masika harvest and the second crop of the msimu harvest start.
Maize is the main staple crop in Tanzania. Rice and beans are also very important, the latter constituting the main source of protein for most low- and middle-income households. Dar es Salaam is the main consumer market in the country. Arusha is another important market and is linked with Kenya in the north. Dodoma represents the central region of the country, a semi-arid, deficit area. Kigoma is an important cross-border market with connections to both the Democratic Republic of Congo and Burundi. Mtwara sits in a south coastal deficit area while Songea and Mbeya represent the southern highlands. Tanga is also a coastal town in the north, with trade connections with Kenya.