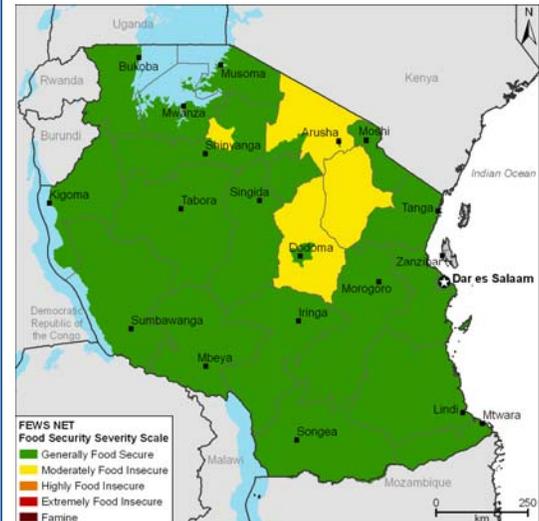


TANZANIA Food Security Update

March 2010

- Food security at the national level generally continues to improve, due to increased food availability from *vuli* harvests in bimodal areas, the start of the green harvest in unimodal areas, and increased availability of agricultural labour opportunities in both unimodal and bimodal areas. However, there are some isolated pockets of food insecurity in areas that experienced poor rains during the 2008/2009 agricultural season and continued to experience below-normal rains this year (Figure 1).
- All markets across the country continue to receive adequate food supplies. Although prices of major staples have begun to decline and stabilize following improved household food supplies from *vuli* harvests and the start of the green harvest in unimodal areas, they have remained above the five-year averages.
- The *msimu* season is ongoing in unimodal areas and the *masika* season has started on time and is generally performing well in bimodal areas. March to May rains are forecasted to be normal over most parts of the country.
- Following the good production prospects for the *msimu* season, traders are releasing their stocks to prepare for the purchase of new crops expected in May for the *msimu* harvest and in July for the *masika* harvest.

Figure 1. Current estimated food security conditions, March 2010

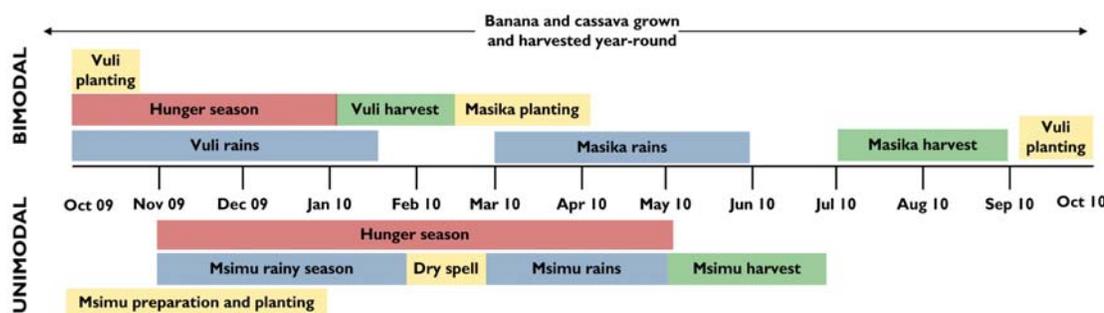


For more information on FEWS NET's Food Insecurity Severity Scale, please see:

www.fews.net/FoodInsecurityScale

Source: FEWS NET

Seasonal calendar and critical events



Source: FEWS NET

Food security overview

Food security at the national level generally continues to improve, following the *vuli* harvest in bimodal areas, the start of the green harvest in unimodal areas, and increased availability of agricultural labour opportunities in both unimodal and bimodal areas. However, there are some isolated pockets of food insecurity in areas that experienced poor rains during the 2008/2009 agricultural season and continued to experience below-normal rains this year. Areas affected include parts of

Dodoma and Ismani division (Iringa district) and areas which have suffered from flash floods, such as Kilosa (Morogoro region) and Mpwapwa (Dodoma region). Also, although the northern and northeastern pastoral areas have received rains that have improved pasture conditions, milk production and animals for sale in many pastoral households in these areas have remained limited.

Major regional and district markets across the country have adequate food supplies following the release of traders' stocks and increased supplies of newly harvested crops (potatoes, bananas, beans, peas, pumpkins, fruits, vegetables, and green maize) have increased food availability for market-dependant households. In bimodal areas the *vuli* harvest has ended and the perennial crop harvest (for bananas, cassava, and fruits) is ongoing and will be at peak production during June/July. This continues to replenish food stocks at household level.

In the northern and northeastern bimodal areas, *vuli* rains facilitated increased pasture and water availability, and improved animal body conditions. Although livestock sales will most likely remain low due to rebuilding of stocks, selling of bulls and purchasing of cows is likely to spare some income to purchase cereals.

Pastoralists in both bimodal and unimodal areas (Longido, Simanjiro, Monduli, Kiteto, Handeni, and Ngorongoro) lost their livestock through animal deaths, mainly of lactating and pregnant animals during the 2009 drought. The food security situation has slightly improved in these areas after the *vuli* harvest, which increased cereal market supplies in bimodal areas. It is expected that food security will improve further in these areas after the *msimu* harvest in unimodal areas (expected to start in May) and the *masika* harvest in bimodal areas (expected to start in June), which will most likely increase supplies and decrease food prices. Full recovery of food security conditions is expected in September/October 2010, when milk production returns to normal following the expected start of calving.

Crop harvesting (for maize, beans, and sunflowers) in the northern and northeastern areas is completed. The February dry spell facilitated drying and marketing of *vuli* crops as well as land preparation for *masika*. This has increased farmers' household-level food stocks and reduced dependency of many households on food from markets. *Vuli* harvesting and *masika* season operations have continued to provide incomes for casual labour-dependent households to meet food and non-food needs since February.

The central regions in unimodal areas received heavy *msimu* rains that started in December and significantly facilitated agricultural activities, which have 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 have started improving at the beginning of March, when the green harvest began, with the exception of localized areas in parts of Mpwapwa district (**Dodoma region**), Kilosa district (**Morogoro region**), and Idodi ward in Iringa district (**Iringa region**). These areas experienced flash floods which destroyed roads, bridges and railways, limited the movement of goods and people, washed out planted crops, and displaced people from their homes. These areas will continue to be stressed until May, when paddy, sweet potatoes, and replanted crops are expected to mature. The government and non-governmental organizations are continuing to provide food aid and shelter to the affected population and to rehabilitate roads and bridges.

In the Lake Victoria zone, *vuli* crop (maize, beans) harvesting in Kagera, parts of Mwanza, Shinyanga, Kigoma and Mara have improved food availability in the area. However, heavy and continuous rains caused beans to rot and start germinating in the field, thus affecting both quality and quantity of bean production. This has affected incomes 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 parts of the Lake Victoria zone, is continuing to provide agricultural labor opportunities (for weeding and spraying) and hence income for casual labor dependent households.

In Kagera region, where the rains started on time and extended into January, the bean crop (an important source of protein and income) was affected by too much rain. The reduced bean production, along with the impact of Banana Bacterial Wilt (BXW) disease which has continued to spread in the region, is likely to reduce the overall Kagera regional crop production

potential. This will most likely have an impact on areas dependent on Kagera for beans and bananas, mainly Mwanza, Shinyanga, Dar es Salaam, and neighbouring countries including Uganda, Burundi, and Southern Sudan.

In the **Southern highlands** (Iringa, Mbeya, Rukwa and Ruvuma regions), the main grain producing-areas in the country, food security has continued to be stable and there are good *msimu* crop production prospects this season. The rains have increased the availability of vegetables, labour opportunities, and green harvests since the end of February. However 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 late vegetative and grain filling, and crops experienced moisture stress in February. The resumption of rains in March has benefited crops that had not reached the permanent wilting stage. However the crops that had reached the permanent wilting point did not recover and it was too late for replanting. These conditions will cause localized poor crop production and thus localized food insecurity conditions in the affected areas, since agriculture production is the main source of food, income from sales, and casual labour employment.

Seasonal progress

March is an important period for both the *masika* and *msimu* cropping season, when the entire country receives rains. This rain facilitates agricultural activities and increases labour opportunities. According to the Tanzania Meteorological Agency (TMA), March rains are ongoing in many parts of the country and have been forecasted to be normal over most parts of bimodal areas with the likelihood of above-normal rainfall in the Lake Victoria zone, and below-normal normal on the northern coast. If the March to May rains perform well as forecasted in most parts of the country, good crop harvests will be expected in both bimodal and unimodal areas. Good crop production will increase household food supplies and reduce households' dependence on markets, thus pushing down prices. However, in the Coast and Dar es Salaam regions, *masika* rains have been erratic and unevenly distributed. If this situation continues it will most likely affect *masika* cropping in these regions.

Over the **Lake Victoria zone** (Mwanza, Mara and Shinyanga regions), above-normal rains have been forecast. If flash floods occur, they will likely destroy crops in the field, especially in the flood plains. In the **central regions**, ongoing rains have facilitated recovery of crops that had wilted following the February dry spell. In the **southern coast regions** (Lindi and Mtwara), the early planted maize wilted following the dry spell but the late planted crops (mainly maize) are in good condition and near maturity stage following ongoing rains, while in the southern highlands early planted maize (November) is at maturity stage and in good condition.

Pasture and water availability for animals continue to improve, maintaining improved animal body condition and milk production as an important part of the diet and source of income in agropastoral households.

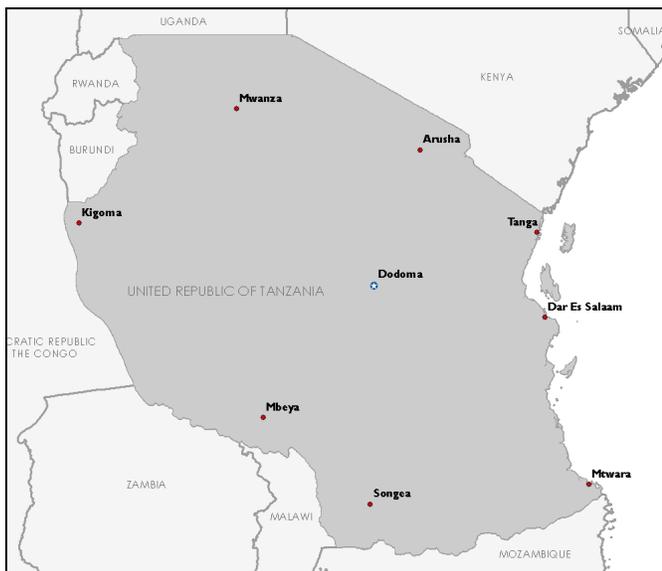
Markets and trade

All markets across the country continue to receive adequate food supplies. Prices of major staples (maize, rice and beans) have started declining and stabilising in most markets across the country following improving household food supplies from *vuli* harvests in bimodal areas and the start of the green harvest in unimodal areas. Furthermore following the good production prospects, traders are releasing their stocks to prepare for purchase of new crop expected in May for the *msimu* harvest and July for the *masika* harvest. Despite the declining price trends, food prices have remained above the five-year average, attributed to the high transportation costs caused by persistent high fuel prices.

Maize is an important source of carbohydrates consumed by many households. Maize prices declined in many markets between January and February though they remained above the five-year average. Price declines were recorded in Musoma (21 percent), Tanga (15 percent), Sumbawanga (13 percent), and Singida (12 percent).

Rice is another important source of carbohydrates, especially in urban areas. Rice prices have declined in many markets and exhibited slight increases in some markets but remained above five-year average prices. The highest price increase was recorded in Sumbawanga (7 percent), and price increases in other markets ranged from one to four percent. The decline and slight increase in rice prices are attributed to greater food availability from the release of traders' stocks.

Many households depend on beans as their main source of protein. The prices for beans have declined in many markets mainly because of the *vuli* harvest and first crop beans from the msimu harvest entering the market. The highest bean price declines were recorded in Sumbawanga (23 percent), Mwanza (22 percent), Shinyanga (19 percent), and Singida (18 percent) between January and February, due to increased bean supply, availability of green vegetables, and increased pulses (mainly peas). Decreasing bean prices improves the ability of many poor households to access an important source of protein, as the prices of other protein sources (sardines and beef) remain high.



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.

Monthly prices are supplied by FEWS NET enumerators, local government agencies, market information systems, UN agencies, NGOs, and other network and private sector partners.

