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EXECUTIVE SUMMARY

Rainfall has been falling consistently across much of the SADC region since the start of the 2005/06 season. Many areas, particularly in the central parts of the region, have received above-normal rainfall and continue to receive high amounts of rainfall. Given the good rains, many countries are generally expecting above average cereal production, provided the rains do not end prematurely and there are no long dry spells. Agricultural activities continue throughout the region, and crops are already reported to be maturing in some parts of the region, while elsewhere they are at vegetative to tasseling stages. Over much of the region where good January rains were received, crops (mainly maize) are reported to be in fair to good condition, while isolated areas in Malawi, Mozambique, Namibia, Zambia and Zimbabwe have experienced crop losses as a result of pest and disease infestation, excessive rains leading to the leaching of soils, and flood damage. There are reports that in some areas (as in Zimbabwe), the poor availability of agricultural inputs such as fertilizers and improved seeds has negatively affected area planted and is likely to lead to reduced yields. The overall regional cereal production outlook remains positive, but the final level of cereal production will depend on continued rainfall during the critical month of February. In contrast to the good rains in the southern part of the region, Tanzania continues to face adverse growing conditions; *vuli* rains have failed in the bimodal areas, and *msimu* rains have been delayed in most parts of the unimodal areas.

As the peak of the hunger season passes, the supply of the main staple crops remains tight, but the availability of early season crops and food aid is beginning to ease the situation in some of the worst affected areas. Domestic prices in South Africa (the main regional maize exporter) have begun to dip slightly, remaining competitive with international prices. Staple food prices, however, remain high where food shortages have been more acute, and continue to rise in both deficit and surplus areas. Intra-regional trade (formal and informal) continues to play an important role in filling import requirements in food deficit countries. Between April and the end of January, South Africa had exported an estimated 1.34 million MT of white maize, 73,800 MT yellow maize and 219,000 MT of wheat into SADC countries. In the same period, informal maize trade levels of in countries for which data are available now totals 119,880 MT.

FOOD SECURITY SITUATION AND CURRENT INTERVENTIONS

Overall, the food security situation continues to be mixed across the region, with the situation deteriorating further as the hunger season peaks in severely affected countries like Malawi, Mozambique, and Zimbabwe as well as Tanzania where food shortages are now being experienced across the country. However, recent reports suggest that the situation may soon stabilize in some areas where rainfall has been favorable, and where communities are already benefiting from early seasonal food crops such as sweet potatoes, pumpkins and wild fruit. These foodstuffs grow abundantly during the rainy season. Field work (planting and weeding) due to an above average agricultural season has also provided an opportunity for households dependent on labor wages to earn income to purchase food supplies, or receive food in return for their labor.

Nonetheless, food security conditions remain concerning and must be closely monitored in Malawi, Mozambique, Zambia, and Zimbabwe, all of which face acute food shortages due to poor harvests last year. Despite ongoing emergency assistance interventions, the numbers of the food insecure will remain high until the end of the hunger season. Most households will at that time begin to access newly harvested crops. Most interventions targeted at the current emergency (WFP general food distributions, C-SAFE distributions, and others) have been planned to peak over the period of January to March 2006. Food aid pipelines for most countries are generally well resourced, though there is concern that breaks

Table 1. WFP Southern Africa Regional PRRO and C-SAFE: Cereal requirements for January - June 2006

	Total Required	Available in Pipeline	Shortfall/Resourcing Needs
Lesotho	23,724	43,856	0
Malawi	73,152	111,367	0
Mozambique	36,090	116,699	0
Swaziland	8,127	39,102	0
Zambia	65,509	200,296	0
Zimbabwe	239,672	234,776	4,896
TOTAL	446,274	746,096	4,896

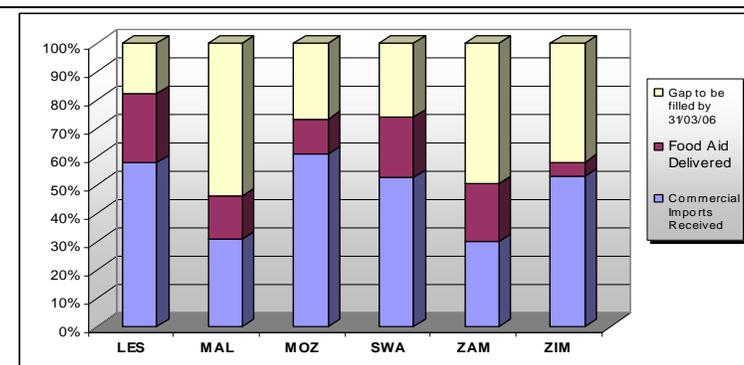
Source: World Food Programme (ODJ) and C-SAFE; January 2006.

may occur as a result of traffic congestion along the routes from the ports of South Africa and Mozambique to their final destinations. Another concern is that although food aid has been well pre-positioned, the destruction of transport infrastructure as a result of heavy rains and flooding will result in failure to deliver aid to the targeted communities, especially those in remote areas.

Table 1 indicates the combined regional pipeline (WFP and C-SAFE) and confirms that, in general over the period January to June 2006, sufficient food will be available to meet emergency and other programmed food aid requirements. Only Malawi projects a cereal shortfall in March (which will be subsequently covered), while Zimbabwe will have shortfalls in March and April; and projects an overall shortfall during this period.

Efforts to fill the maize gap in the six countries requiring humanitarian assistance have had varied success over the course of the marketing year. As shown in Figure 1, Lesotho, Mozambique and Swaziland are currently facing smaller import gaps that still remain to be filled by the end of the marketing year, while Malawi, Zambia and Zimbabwe still have extremely large import gaps of 54%, 49%, and 42%, respectively. Progress in the delivery of planned commercial imports is better - ranging from 58% (Malawi), to 96% (Mozambique) - compared to the delivery of planned food aid. With only three months to the end of the marketing year, most countries have received between 20% and 40% of planned food aid; the exception is Lesotho (84%) and Swaziland (69%). Slow delivery rates have been exacerbated by the lack of adequate regional transport (rail and truck) to deal with the huge demand occasioned by large consignments of both food and inputs being moved from South Africa to recipient countries. As depicted in Table 2, the slow rates of food aid delivery have slowed down planned distributions (WFP and C-SAFE) in the period April to December, with only 57% distributed (on average) in the six countries.

Figure 1: Maize import progress: April - January 2006
Countries under WFP Regional PRRO for Southern Africa



Source: National Early Warning Units, FAO/WFP CFSAM-July 2005 and WFP (ODJ), FEWS NET/WFP Cross border initiative, SAGIS, and C-SAFE.

Table 2: Food aid (Cereal) distributions during period April - December 2005 (Metric tons)

	Planned	Distributed	% covered
Lesotho	33,950	27,023	80
Malawi	108,867	66,265	61
Mozambique	49,548	23,213	47
Swaziland	11,208	9,394	84
Zambia	70,540	36,667	52
Zimbabwe	141,947	73,556	52
TOTAL	416,060	236,119	57

Source: Based on data from WFP (ODJ) and C-SAFE (covering Lesotho, Zambia and Zimbabwe)

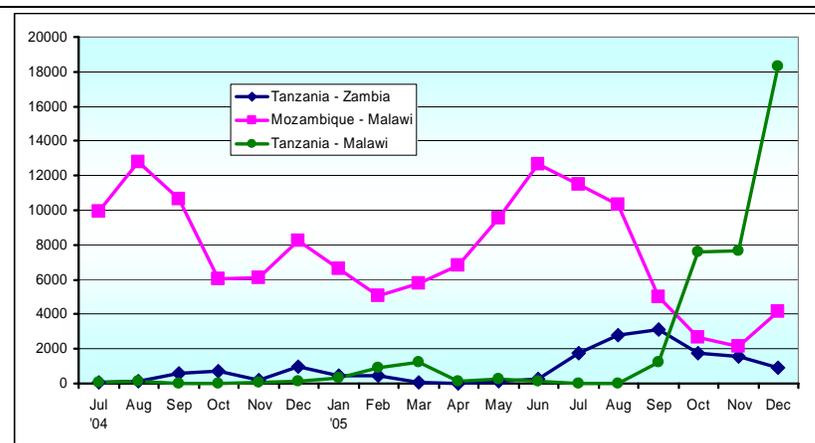
REGIONAL PRICE MOVEMENTS AND TRADE FLOWS

Informal cross border food trade

The month of December saw vibrant cross-border trade in the region, with a marked increase in volumes traded among the countries for which the trade is monitored. While maize trade levels had fallen to 11,800 MT in November, there was a huge resurgence in December, with the level doubling to 23,550 MT. A similar upward trend in volumes traded was observed for rice and beans. This brings the total observed trade since April 2005 to 119,880 MT maize, 15,000 MT rice, and 14,000 MT beans.

The increased volume in informal maize trade in December was largely a response to growing demand, mainly in Malawi, as the hungry season reached its peak. Most of the trade consisted of maize exports from Tanzania to Malawi, which reached an all time high (since

Figure 2: Volume of Informal Cross-Border Trade in Maize between Malawi, Mozambique, Tanzania, and Zambia: July 2004 - December 2005 (MT)



Source: FEWS NET Malawi and Independent Management Consulting Services - Zambia

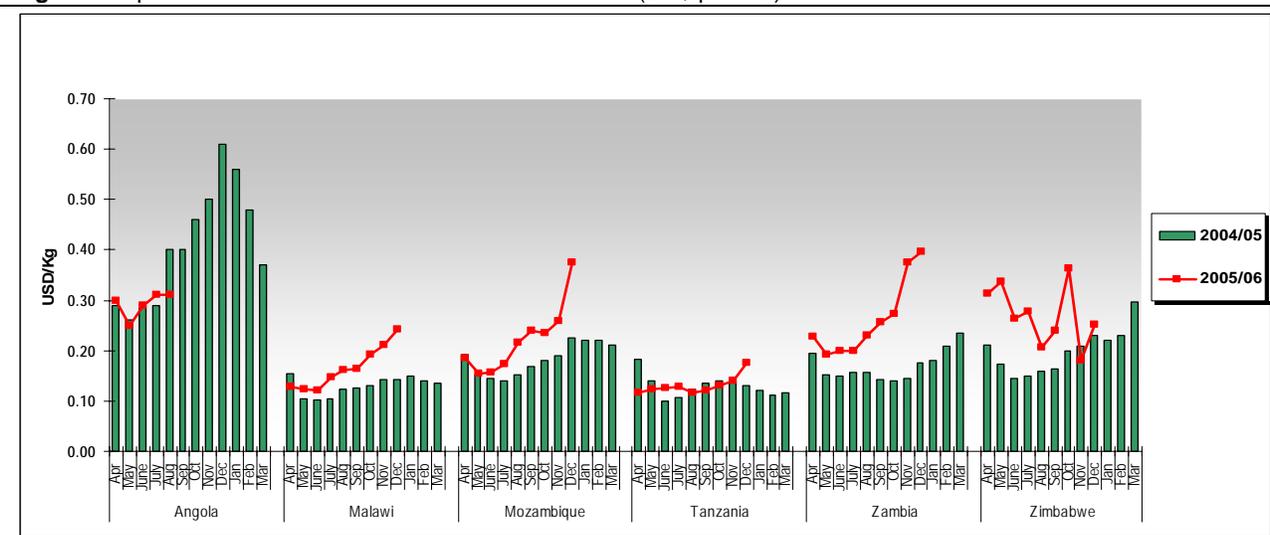
monitoring began in July 2004) at 18,300 MT in the month of December alone, and this was only from one border post. Last season, and earlier this marketing year, Mozambique was the largest exporter of maize to Malawi (see Figure 2). Still, due to poor harvests last year, and much higher prices prevailing in Mozambique, Mozambican exports have dropped considerably, though there was a marked increase between November and December. Although export volumes from Tanzania to Zambia have also been quite substantial since the Tanzanian harvest in July, levels have been tailing off since October, having dropped from a high of 3,000 MT in September to a low of 878 MT in December. Since July, Malawi has imported almost 93,000 MT of maize through informal trade with Mozambique (65,000 MT) and Tanzania (28,000 MT). Zambia has informally imported 12,000 MT from Tanzania; while an amount close to 5,000 MT has been recorded as informal exports from Zambia to the DRC.

The importance of monitoring this trade is demonstrated by the amounts that have been observed moving along the borders between Malawi and her neighbors. These data have made it possible to update the national and regional annual food balance sheets, using not only the formal imports from South Africa (currently at 42,000 MT), but the informal maize trade which is actually significantly higher than the formal trade. The monitoring system has also highlighted the current high levels of maize exports from the surplus areas of Tanzania (Mbeya and Iringa) as traders (Tanzanian and Malawian) seize the opportunity to move maize throughout deficit Malawi (from north to south). Trade policies in Tanzania, like the absence of export levies, have also favored this vibrant trade, resulting in this unprecedented informal outflow of maize from the country. In an effort to also encourage imports back to Tanzania, the government has temporarily suspended the import levy as fears mount that the country may soon face maize shortages; especially in view of the failed 2005/06 *vuli* season, and the delayed start of the long rains in the unimodal areas. For a detailed discussion, see FEWS NET/WFP Informal Cross Border Food Trade - Issue 16; December 2005.

Retail maize price movement

As reported last month, retail maize prices throughout the region continued to climb in December and January in response to growing scarcity. Figure 2 shows that this year's prices are significantly higher in all monitored countries, but especially in Zambia, Mozambique, and Malawi, where increases between September and December have been quite steep.

Figure 3: April 2004 - December 2005 Maize Retail Prices (US\$ per KG)



Source: FEWS NET Angola, Malawi, Mozambique, Tanzania, Zambia and Zimbabwe

Although a significant increase occurred in the average monitored price for Tanzania, maize retail prices here are still the lowest in the region, with December prices averaging US\$0.18/kg in the monitored markets of Dar es Salaam and Mbeya (compared to the highest level of US\$0.40/kg recorded in Zambia). The increase in maize prices can be attributed to the vibrant export trade, the increase in transport costs due to rising oil prices, and the failed *vuli* season, from which fresh maize harvests would by now have augmented available supplies. The appreciation of the Zambia Kwacha has also contributed to the marked increase (in US\$) of retail prices in Zambia. For Malawi, where prices have also been comparatively lower, price increases in the monitored markets of Nsanje, Mchinji and Chitipa have been steeper since September, rising from an average of US\$0.16/kg to US\$0.24/kg in December (a 50% increase). In Mozambique, recent steep increases, especially in the central and northern regions that generally have surpluses, have significantly pushed up the national average, which rose from US\$0.24/kg in September to US\$0.38/kg in December (or by 58%). While prices in Maputo have been consistently high since August (around US\$0.27/kg), prices in Beira and Nampula rose significantly from US\$0.20/kg in August to US\$0.36/kg in December, and in Nampula, from US\$0.22/kg in September to US\$0.36/kg in December. This is indicative of fast dwindling supplies in the central and northern regions. FEWS NET Mozambique reports that rising fuel and transportation costs have contributed to general cereal price increases.

In Zambia, the average prices (Lusaka and Choma) increased to a peak of US\$0.40/kg in December - a level that is more than double that reached in December 2004 when the country had adequate maize supplies. Prices have risen 110% since the lowest price of US\$0.19/kg recorded during the harvest in May 2005. Limited on-farm and market availability, the very slow pace of commercial imports, and inadequate food aid interventions to-date have contributed to the steep price hikes (Figure 1). In Zimbabwe, the December average price in Bulawayo and Harare was calculated at US\$0.25/kg, having dropped from US\$0.36/kg in October following a significant depreciation of the Zimbabwe dollar. However in Zimbabwe dollars, nominal December prices at these two markets (at Zim\$17,143/kg) have risen 82% since September (Zim\$9,429/kg); a trend indicative of general food price increases across the country. Indications are that nominal January prices have maintained the December levels, with an average (Harare and Bulawayo) of Zim\$17,500/kg (but in US dollars, prices fell to \$0.21/kg as the Zimbabwe dollar depreciates further).

White Maize SAFEX begins to dip

Conversely, in January, white maize prices on the South African Futures Exchange (SAFEX) began to fall steadily from the high levels indicated in December (see Figure 4). The January average (nearby) for white maize was recorded at R1,090/MT, down from the December level of R1,103/MT, which was the highest level reached this marketing season. The marginal decline can be attributed to the good rains that have been received since mid December and the positive seasonal outlook over most of the maize producing areas in the country (and the region). The relatively lower international maize prices (in Argentina, white maize was quoted at US\$109/MT on January 27th) may also exert some downward pressure on the domestic price. However, the small size of crop expected, plus the alternative uses to which farmers are contemplating putting their crop (fuel and livestock feed) will restrain a free fall in prices, and it is unlikely that levels as low as those seen this past season (R563/MT in May 2005) will be reached. Despite the lower harvest expectation, the large carryover stocks (now estimated by the National Department of Agriculture at 3.60 million MT) expected at the end of this marketing year will boost domestic availability, making it adequate to cover domestic consumption requirement plus cover the export needs of structurally grain deficit neighboring states. Over the current marketing year, SAGIS records (as at February 3, 2006) indicate that South Africa has managed to ship out a total of 1.33 million MT (of the available surplus of 5.50 million MT) of white maize to destinations all over Africa, with 1.26 million MT going to SADC member States. The largest single recipient country has been Zimbabwe, receiving a total of 781,735 MT (between May and January), while drought affected Lesotho, Mozambique, Malawi, Swaziland and Zambia together purchased 273,000 MT.

Figure 4: Prices of White Maize delivered in Randfontein (SAFEX, Import and Export parity) May 2002 - January 2006

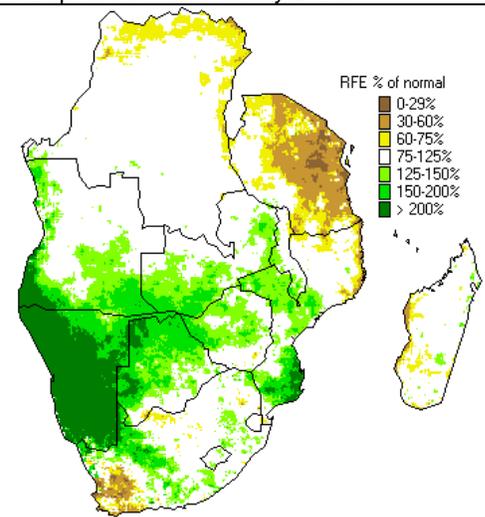


SEASON PROGRESS AND PRODUCTION OUTLOOK

Rainfall has been falling consistently across much of the SADC region since the start of the 2005/06 rainfall season. Many areas, particularly in the central parts of the region, have received above-normal rainfall (green colors, Figure 5) and continue to receive high rainfall. Given the good rains that are falling in these parts, many countries are generally expecting relatively high yields at the end of the season, on condition that the rains do not end prematurely, and that there are no long dry spells. Current forecasts from climate forecasting centers including the SADC Drought Monitoring Center are predicting that for the period February to April 2006, there will be an enhanced chance that rainfall received will be normal to above normal over most parts of the region.

Local experts in many countries are expecting and hoping for good yields despite some cases of excess rains (which in some areas have flooded and destroyed extensive cropped areas), and despite reports of outbreaks of pests like armyworms (in Malawi, Mozambique, Namibia, Zambia, and Zimbabwe). In all countries, the armyworm outbreak has been brought under control mainly through spraying, and as a result of the heavy rains that fell over most of January. In contrast to the good rains experienced elsewhere, most of Tanzania and some parts of northern Mozambique have been receiving poor rains so far this season (Figure 5, brown colors in the north-east of the region) although rainfall has recently improved in northern Mozambique. In Tanzania, the short season *vuli*

Figure 5: Rainfall as a percent of average: 1 September - 30 January 2006.



rains, which occur in the bimodal areas in the northern parts of the country, failed, and a poor harvest is expected from this area. The short season normally occurs between September and January. In the unimodal areas, the rainfall also started much later than usual, and the first good rains were only received in mid-January in many of these areas.

While the heavy rains that fell in the last few weeks have been mostly good for the crops, they have also resulted in flooding and water logging in some areas, particularly those within the Zambezi River Basin. Mozambique, which is downstream of Malawi, South Africa, Zambia and Zimbabwe on a number of large river basins, has been more affected by this flooding. According to the Mozambique news agency AIM, about 18,000 people in the Zambezi valley in Sofala Province were affected by the floods during December and January, over 1,700 houses were destroyed in the more northeastern Nampula province, while about 300 households had been affected in southern Inhambane Province in the south. By mid January, Mozambique authorities were still on flood alert, as the Zambezi River and other major rivers in central Mozambique had very high water levels. Towards the end of January though, rivers began receding, reducing the risk of further flooding, although this could be countered by the tropical storm *Boloetse* that was in the Mozambique channel barely off the coast of central Mozambique, at the time of writing this report. The tropical storm threatens to develop into a cyclone, and may affect coastal areas of Mozambique. Reports from Malawi (UN-OCHA) say that some 35,576 households in the southern districts of Malawi (Nsanje and Chikwawa) were affected by flooding. Emergency interventions include the distribution of agricultural inputs by the Ministry of Agriculture and Food Security to farmers who had lost their crops to flooding. Other food and non-food items were also provided. However in some cases, roads in affected areas were impassable, and flood victims could not be reached. The affected southern districts are also the ones that were badly affected by the drought last season. In Namibia and Botswana, there were reports of flash-flooding that affected several households in some instances, and sometimes caused traffic blockages due to deep-flowing rivers.

Country Focus:

<p>ANGOLA: Area planted to staple crops and subsequent production is expected to increase further in the 2005/06 season for a variety of reasons. Continued production recovery measures—such as provision of farm inputs to resettled farmers—coupled with good rains, have helped enhance production prospects. Although assistance from humanitarian agencies has declined this season, government efforts have been stepped up. Crop conditions around the Planalto Region are reported to be good, raising expectations of another good harvest. No major pests have been reported so far this season.</p>
<p>BOTSWANA: A drought assessment tour (DAT) is currently underway to assess this season's production prospects. However, like most neighboring countries, rainfall performance showed marked improvement in Botswana this year compared to last season. Many areas have received above normal rains, and cases of flash flooding have been reported. Although crop damage has not been assessed, it is likely to have been limited. Since the country is forecast to receive normal to above normal rains for the remainder of the season; there is a good chance that the 2005/06 harvest will improve considerably over last year when production had dropped 23% below the past 5 year average.</p>
<p>LESOTHO: The heavy rains received during the first two dekads of January have boosted cumulative rainfall levels to near-normal, except in a few areas (notably Mafeteng and Mohale's Hoek) which still remained much below normal. The condition of the maize crop (now mainly at vegetative to flowering stage) varies significantly across the country. A few areas are reporting the maize crop in good condition; while other areas are reporting poor conditions as a result of the dry spells experienced prior to the January rains. Although the SADC DMC has forecast higher probabilities of normal to above normal rains for the February to April period over north eastern half of the country, below normal rains (as forecast for the south western half) would further dampen overall harvest expectations.</p>
<p>MALAWI: Despite a late onset of rains this season, crop growing conditions have been favorable, with near normal to above normal rains having been received over most of the country. With the exception of the damage caused by flooding, water logging and the armyworm infestation in parts of the country, crop conditions over most of the country are good. The first round of production estimates will be released in early February, and there is general optimism that if favorable weather conditions continue to the end of the season, this year's harvest will be exceptionally good. At the same time, the level of rainfall activity has improved prospects for winter crop production. The crop stand is reported to be quite good mainly as a result of better uptake of chemical fertilizers and improved seeds compared to previous years as a result of government and partners' efforts to boost production recovery through provision of subsidized inputs to targeted beneficiaries (some 2 million smallholder farmers).</p>
<p>MOZAMBIQUE: Overall, crop growing conditions have been favorable over most of the country except for parts of the northern region where the onset of rains was late (and cumulative rains remain below normal), and those areas in the central and southern regions affected by flooding. Better production prospects and increased area planted are expected this year compared to last season, especially in upland areas, including those areas hard hit by last season's drought. The government and its partners provided timely inputs to augment farmers' retentions from previous seasons and what little they could purchase. Cereal crops range from vegetative (where planting was late and/or where replanting was necessitated by flooding) to tasseling. The crop stand is mostly good, except where excessive water has resulted in leeching of soils as in areas along the Limpopo and Zambezi valleys. Outbreaks of pests such as army worm, elegant grasshopper, and stalk borer among others are likely to dampen harvest prospects although the overall impact has not yet been assessed. Cassava, sweet potatoes and other legumes have been actively promoted across all three regions, and in the central, reports are that farmers are already harvesting sweet potatoes. The forecast for normal to above normal rains in the south and central regions for the February to April period is likely to further enhance crop yields, and also encouraging the planting of second season crops. However, below normal rains are forecast to continue in the northern tip of the country.</p>
<p>NAMIBIA: Crop growing conditions have been favorable as a result of above normal rains received in the northern crop growing regions of the country leading to expectations of excellent harvests this season. Early planted crops, especially in the commercial sectors of Caprivi and Kavango regions, benefited from the December/early January rains, the first soaking rains to fall. A crop assessment by a team from the Ministry of Agriculture to the northern regions in early</p>

February will provide an indication of area planted and the current condition of the cereal crops (mainly millet and sorghum) and also assess the impact of the flooding and water logging that was been reported in January. Current indications are that area planted will increase compared to last year when rainfall performance was poor, and with the favorable forecast over those crop growing regions, a much improved harvest is in prospect.

SOUTH AFRICA:

Maize production in South Africa is set to decline considerably this season due to a marked reduction in area planted coupled with a poor start to the 2005/06 season across many parts of the country, including the maize triangle. Good rainfall was only received since the second half of December, and indications are that this is likely to continue until April; though below normal rains can be expected in late February/ early March. The National Department of Agriculture's Crop Estimates Committee (CEC) current estimate for area planted to maize stands at 1.55 million hectares (a 45 percent drop from last year's 2.81 million hectares). Assuming average yields, production levels will range between 6 and 7 million MT (Enviro Vision No. 70). The rainfall performance in February will be the critical determining factor. The wheat crop estimate has been revised up from 1.80 million MT to 1.84 million MT (compared to 1.68 million MT last year) as a result of improved yield expectations in some wheat growing areas.

SWAZILAND:

Rainfall performance in the first half of the season was not favorable for crop production, although rains have improved since the first dekad of January. The maize crop is mainly at late vegetative stage and the condition has improved with the January rains except in the Lowveld and Lubombo Plateau where December dry spells caused wilting and in some parts led to stunting. This crop is not likely to recover, and the Ministry of Agriculture has advised farmers not to do any further plantings of maize, but to plant legumes, groundnuts and potatoes. The condition of these crops (legumes etc) is reported as good with a significant harvest expected. If good rains continue through February and March (as forecasted by the DMC), the country is likely to see improved harvests this year compared to last year when growing conditions were poor, particularly in the second half of the season.

TANZANIA:

The short rainy season (*vuli*) in bimodal rainfall areas is expected to be a near total failure as a result of a delayed start and poor rainfall distribution, which impeded the growth and development of the crops in the northern, northeastern and northern coastal zones of the country. While the crop should have been nearing maturity by now, the surviving crop is reportedly at the flowering stage, and indications suggest yields will range from 0 - 50% of normal, with better harvests expected from the highland areas (like Moshi District) than in the lowlands. In the unimodal rainfall areas, the delayed onset (by as much as six weeks in some places) and the February - April forecast of below normal rains may negatively impact overall crop production. Current widespread soil moisture deficits are reportedly also affecting perennial crops like bananas, coffee and citrus as well as rangelands (leading to poor pastures and deteriorating livestock condition).

ZAMBIA:

Rainfall received this season has been adequate for crop development in most areas, with many receiving above normal rains and reporting a fairly good crop stand. Crop growing conditions have also reportedly improved in the few areas (in the north east) where rains were below normal in the first half of the season, and where planting was therefore delayed. Despite the inadequacy of input support programs, and the high costs of market supplies, area planted is reported to have increased over last year mainly as a result of the timely onset and even rainfall distribution. Factors that may affect final harvests include heavy rains that led to flooding and subsequent crop loss in some areas along the Zambezi River Basin in Western Province, and reported incidences of army worm outbreaks in some districts of Southern Province and Western Province. The favorable forecast for February to April (which means the country may not experience the normal January/February dry spell) bodes well for overall improved yields.

ZIMBABWE:

This season, crop growing conditions (good rains) have been favorable for crop production over most of the country, with effective planting rains occurring by mid-November. Farmers are reported to be weeding and applying top dressing fertilizer, while the crop is mostly at vegetative stage. The widespread shortage and high cost of farming inputs (seeds, fertilizers, fuel, draft power etc) has however severely limited the capacity of farmers (both smallholders and commercial) to increase area planted, and thus raise production levels this season. Reports at the start of the season indicated that agricultural preparedness in the country was very poor; and this has led to failure to take full advantage of the good rainfall with farmers forced to plant late, and to reduce planted areas as a result of late acquisition (or non availability) of necessary inputs, dampening expectations for improved harvests. Reported outbreaks of army worms in many provinces have been brought under control although there was an initial delay; resulting in the loss of some 1000 HA of crops as a result of short supply of spraying chemicals. Leeching of soils, water logging and a proliferation of weeds as a result of excessive rains are likely to negatively affect final yields as well. However, it is still expected that cereal harvests will exceed last year's drought-affected harvest, estimated at about 700,000 MT (or 53% below the last 5 year average).

The Southern Africa Food Security Brief draws from the FEWS NET monthly food security reports, with additional contributions from network partners including FEWS NET/USGS, the SADC Regional Remote Sensing Unit, SADC Regional Early Warning Program – Gaborone, and the SADC Regional Vulnerability Assessment Committee comprised of SADC FANR, FAO, WFP, FEWS NET, SC (UK), and OCHA. Additional information is drawn from the National Early Warning Units and Meteorology Services in SADC member States.