ESWATINI

Slight deterioration in food security linked to climatic shocks, elevated food prices, and economic instability

IPC ACUTE FOOD INSECURITY ANALYSIS

JUNE 2026 – MARCH 2027
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CURRENT ACUTE FOOD INSECURITY JUNE - SEPTEMBER 2026

222,000

18% of the analysed population

People facing high levels of acute food insecurity (IPC Phase 3 or above)

IN NEED OF URGENT ACTION

Phase 5	0 People in Catastrophe
Phase 4	0 People in Emergency
Phase 3	222,000 People in Crisis
Phase 2	455,000 People Stressed
Phase 1	559,000 People in food security

PROJECTED ACUTE FOOD INSECURITY 0CTOBER 2026 - MARCH 2027

286,000

23% of the analysed population

People facing high levels of acute food insecurity (IPC Phase 3 or above)

IN NEED OF URGENT ACTION

Phase 5	0 People in Catastrophe
Phase 4	22,000 People in Emergency
Phase 3	264,000 People in Crisis
Phase 2	457,000 People Stressed
Phase 1	492,000 People in food security

Overview

Between June and September 2026, an estimated 222,000 people—18 percent of the analysed population—are classified in Crisis or worse (IPC Phase 3 or above). This represents a 2-percentage point increase compared with the same period last year, rising from 16 percent (about 193,000 people) to 18 percent (about 222,000 people).

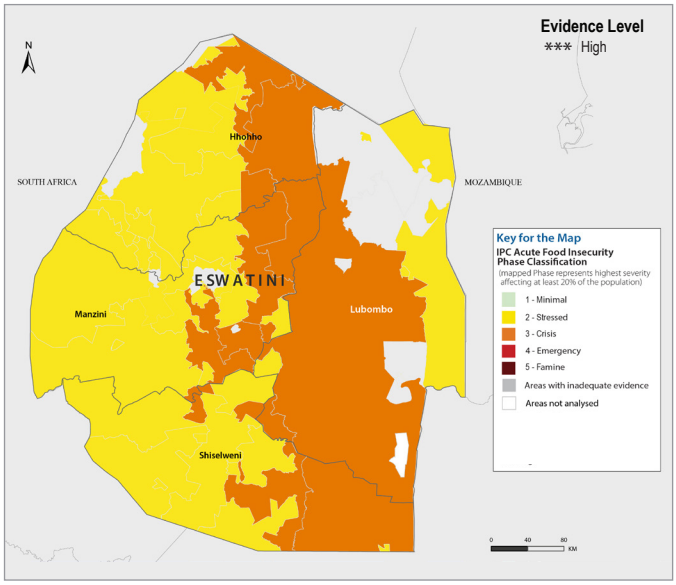
The deterioration is driven primarily by irregular rainfall, including dry spells and excessive rains that reduced crop production and disrupted harvesting. Depleted household stocks have forced families to adopt coping strategies earlier than usual. Persistently high food, agricultural input, and fuel prices continue to erode purchasing power, while limited livelihood opportunities have constrained household incomes. These pressures have been further compounded by the Foot-and-Mouth Disease (FMD) outbreak, which has reduced livestock productivity and disrupted livestock trade.

Conditions are expected to deteriorate further between October 2026 and March 2027, a seasonal decline reinforced by the projection period coinciding with the lean season. The population in Phase 3 or above is projected to increase by 5 percent compared with the current period. Around 264,000 people (21 percent of the population analysed) are expected to be in IPC Phase 3 (Crisis), while 22,000 people (2 percent of the population analysed) are projected to be in IPC Phase 4 (Emergency). In total, 286,000 people (23 percent) are expected to face Phase 3 or above—up from 259,000 projected for the same period last year, an 11-percent year-on-year increase.

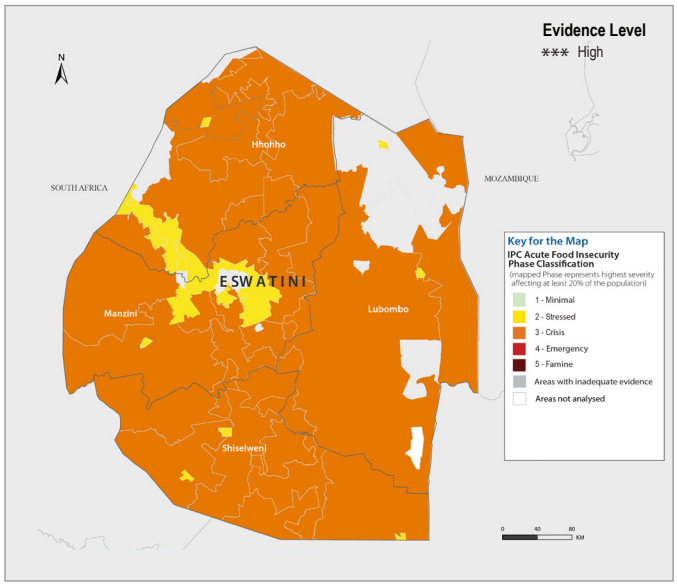
The situation has worsened markedly compared with the same period in 2025. The Lowveld Cattle and Maize (LCM) zone remains the most affected, with 85,656 people classified in Phase 3 or above—an 18-percent increase from 72,500 last year. The Dry Middleveld (DMV) follows with approximately 30,000 people, a slight 1-percent rise. For the first time, the Highveld Cattle and Maize (HCM) zone has joined the most affected areas, with 24,000 people in Phase 3 or above, highlighting how food insecurity is expanding beyond traditionally vulnerable zones.

Eswatini has been gradually recovering from serious drought episodes such as 2015/16, but recurrent shocks—including intermittent dry spells, erratic rainfall, and frequent hailstorms—continue to undermine household food security and limit recovery.

Current Acute Food Insecurity June – September 2026



Projected Acute Food Insecurity October 2026 – March 2027



Key Drivers

High food prices

The prices of inputs, food, and fuel have remained significantly above the five-year average due to supply chain disruptions in international markets. The 2026 conflict in the Middle East continues to strain household economies and weaken purchasing power.

Poor rainfall

Households across the country are facing climate shocks, including drought, hailstorms, and excessive rainfall. October's dry spells damaged early-planted crops, particularly in the LCM zone, while heavy rains in February and March disrupted crop maturation, harvesting, and bean production.

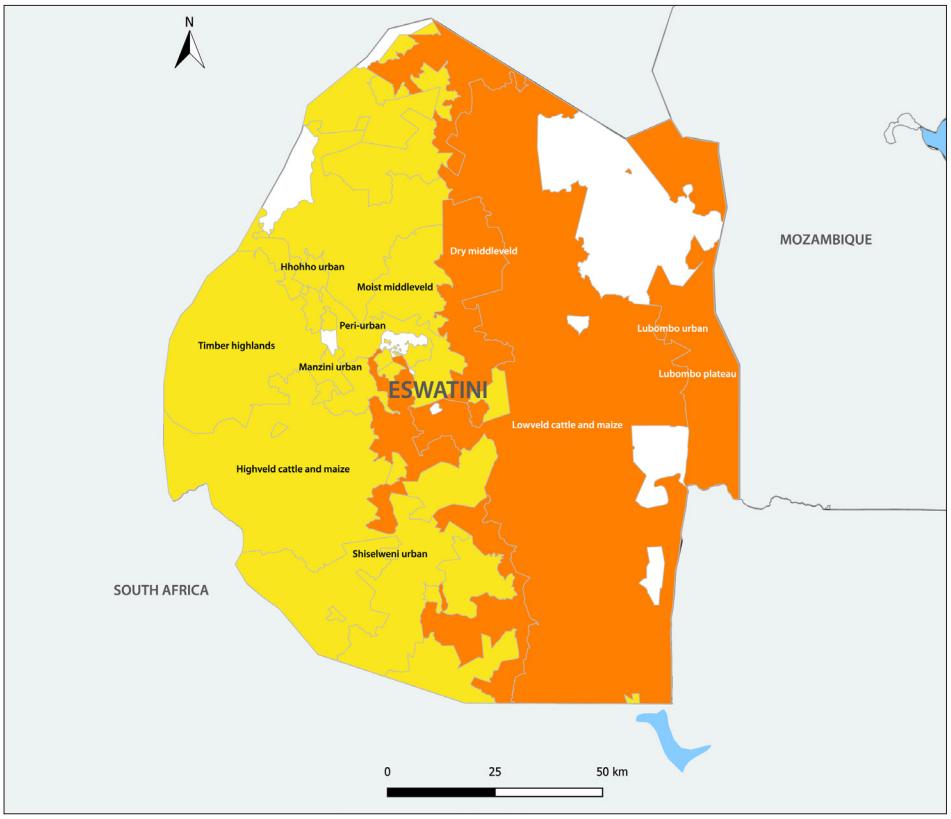
Reduced incomes

Household purchasing power has declined due to reduced economic activity, slow recovery, and limited employment opportunities.

Diseases

The outbreak of FMD has lowered livestock productivity and restricted trade, further compromising household income.

CURRENT IPC ACUTE FOOD INSECURITY MAP AND POPULATION TABLE (JUNE – SEPTEMBER 2026)



Key for the Map

IPC Acute Food Insecurity Phase Classification

(mapped Phase represents highest severity affecting at least 20% of the population)

- 1 - Minimal
- 2 - Stressed
- 3 - Crisis
- 4 - Emergency
- 5 - Famine
- Areas not analysed

Evidence Level

*** High

Current Population Table June – September 2026

Zone	Total population analysed*	Phase 1		Phase 2		Phase 3		Phase 4		Phase 5		Area Phase	Phase 3+	
		#people	%	#people	%	#people	%	#people	%	#people	%		#people	%
Dry middleveld	149,980	67,491	45	52,493	35	29,996	20	0	0	0	0	3	29,996	20
Hhohho urban	83,760	41,880	50	33,504	40	8,376	10	0	0	0	0	2	8,376	10
Highveld cattle and maize	161,172	72,527	45	64,469	40	24,176	15	0	0	0	0	2	24,176	15
Lowveld cattle and maize	244,732	73,420	30	85,656	35	85,656	35	0	0	0	0	3	85,656	35
Lubombo plateau	47,777	19,111	40	21,500	45	7,167	15	0	0	0	0	2	7,167	15
Lubombo urban	55,726	27,863	50	22,290	40	5,573	10	0	0	0	0	2	5,573	10
Manzini urban	93,370	46,685	50	37,348	40	9,337	10	0	0	0	0	2	9,337	10
Moist middleveld	145,499	72,750	50	50,925	35	21,825	15	0	0	0	0	2	21,825	15
Peri Urban	108,668	54,334	50	43,467	40	10,867	10	0	0	0	0	2	10,867	10
Shiselweni urban	51,461	30,877	60	15,438	30	5,146	10	0	0	0	0	2	5,146	10
Timber highlands	94,211	51,816	55	28,263	30	14,132	15	0	0	0	0	2	14,132	15
Grand Totals	1,236,356	558,754	45	455,353	37	222,251	18	0	0	0	0		222,251	18

Note: A population in Phase 3+ does not necessarily reflect the full population in need of urgent action. This is because some households may be in Phase 2 or even 1 but only because of receipt of assistance, and thus, they may be in need of continued action. Marginal inconsistencies that may arise in the overall percentages of totals and grand totals are attributable to rounding.

CURRENT SITUATION OVERVIEW (JUNE – SEPTEMBER 2026)

Between June and September 2026, around 222,000 people (18 percent of the analysed population) are classified in IPC Phase 3 or above (Crisis or worse)—representing an increase of 2 percentage points compared with the same period last year, when approximately 193,000 people (16 percent) faced similar conditions. The overall food insecurity situation is driven by compounding vulnerabilities, including climate-induced natural disasters (prolonged dry spells, excessive rains, hailstorms, and windstorms), elevated food and fuel prices, reduced household incomes, and the lingering effects of the FMD outbreak. Climate variability continues to threaten food security and agricultural production, driving price increases and hindering access to food. The increase in frequency and incidence of climate-induced natural hazards, particularly the devastating hailstorms that affected several livelihood zones, continues to elevate the risk of food insecurity and raises concerns, given agriculture's significant role in the economy and household livelihoods.

The 2025/26 season experienced an early to normal rainfall onset in most parts of the country; however, the season was characterised by erratic rainfall and uneven distribution. Prolonged dry conditions were observed from the second *dekad* (a ten-day period used in rainfall monitoring) of November to the first *dekad* of December, which damaged early-planted crops, particularly in the LCM zone. This was followed by periods of excessive rainfall in January and February, which disrupted crop maturation, harvesting, and bean production across several zones. While most zones recorded rainfall amounts near their respective long-term averages, the spatial and temporal variability in rainfall distribution, coupled with the frequency of extreme weather events, had a pronounced negative impact on crop production and household food availability. The Lubombo Plateau experienced normal rainfall but remained vulnerable to production shortfalls due to other compounding factors, including limited land access and livestock disease constraints.

The agricultural season saw a modest decline in overall crop production, with maize production estimated at 69,064 metric tonnes (MT), reflecting an 1-percent decrease from the previous year's yield. This reduction was primarily driven by the erratic weather patterns, including dry spells during critical crop development stages and excessive rainfall during the maturation and harvesting periods. Considering the national maize requirement of approximately 160,000 MT, these figures reveal a significant maize production gap of 90,936 MT, underscoring a critical vulnerability in the country's ability to meet its population's food needs. This deficit necessitates substantial imports from South Africa and other Southern African Development Community (SADC) countries to bridge the gap. However, several other crops experienced growth during the season. Sweet potato production recorded a substantial increase, suggesting successful agricultural practices or favourable conditions for this drought-tolerant crop. Sorghum production also rose, indicating better-than-expected yields, which could be attributed to favourable growing conditions, improved farming techniques, or advantageous seed selection. Bean production similarly increased, signalling improvements in yield and potentially reflecting better access to inputs or favourable growing conditions. While these gains in drought-tolerant and leguminous crops are positive developments, they have not offset the staple maize deficit.

Eswatini's domestic food prices remained elevated throughout the 2025/26 season, with most staple goods trading above their five-year averages. While international food markets have shown some signs of stabilisation, the persistence of elevated domestic food prices in Eswatini is attributable to a combination of regional demand, currency volatility, high input costs, transport-related inflation, and the impact of rising global fuel prices driven by ongoing geopolitical tensions. These factors continue to undermine food affordability, particularly among the most vulnerable households, dampening household spending as real wages weaken and consumer purchasing power erodes.

Households' vulnerability to food insecurity is also exacerbated by structural factors, including extreme poverty affecting a significant proportion of households in the country, limiting their ability to purchase adequate food. Poor households spend a large proportion of their income on food, making them highly susceptible to price increases and thus reducing access to adequate nutrition. This raises particular concern as many households face increased vulnerability to chronic illnesses, which further strain limited financial resources, forcing families to prioritise medical expenses over food. Humanitarian food assistance has been provided to households experiencing consumption gaps. However, coverage falls below IPC minimum significance thresholds, both in the share of households reached and in the share of kilocalorie needs met.

The zones most affected during the current period are LCM (85,656 people in IPC Phase 3), DMV (29,996 people) and HCM (24,176 people). The inclusion of HCM among the most affected zones underscores the increasingly widespread nature of food insecurity, extending beyond traditionally vulnerable areas.

Food availability

At the national level, current maize production stands at 69,064 MT against a requirement of 160,000 MT, leaving a deficit of 90,936 MT that will need to be covered through imports from South Africa and other SADC countries, despite a 10 percent increase in cultivated area to 75,143 hectares. Food availability remains constrained by below-average yields, limited land access, and recurrent climatic and livestock shocks, with deficits most pronounced in the DMV (4,665 MT). The LCM zone records one of the lowest maize yields in a decade, compounded by FMD restricting livestock sales, while the Lubombo Plateau is similarly affected, producing only 1,365 MT of maize and 225 MT of beans from 452 hectares. In peri-urban areas, production of 7,155 MT of maize and other crops supports short-term consumption, though over half of households lack land and rely entirely on markets; the Timber Highlands (TH) zone records very low production (280 MT), insufficient for local needs. Urban zones show stark contrasts: Urban Hhohho and Urban

Manzini are heavily market-dependent and vulnerable to high food prices. Overall, food availability across Eswatini remains fragile, undermined by low crop yields, unequal land access, climatic shocks, and livestock disease outbreaks. Although markets remain functional, reliance on imports and rising costs threaten household food security, particularly in maize-deficit and livestock-dependent areas, underscoring the need for climate-smart agriculture, improved input access, and stronger measures to mitigate livestock disease impacts.

Food access

Food access in Eswatini during 2026 remains fragile, constrained by rising fuel costs, elevated food prices, and limited household incomes despite some easing in global commodity markets. Production shortfalls, most pronounced in the DMV, have left households facing high costs for staples such as beans at 27.38 Swazi lilangeni (SZL) per kg, maize meal at SZL 13.44 per kg, and rice at SZL 15.73 per kg. While markets in the HCM and Moist Middleveld (MM) are physically accessible, weak purchasing power and elevated cooking oil prices limit affordability. Rising costs of beans, sugar, and oil in the LCM and Lubombo Plateau further erode resilience, compounded by long travel distances and transport expenses, while humanitarian food security assistance (HFSA) reaches only a small share of households (not meeting IPC minimum significance levels). In peri-urban and TH, favourable market proximity and limited food aid provide partial support, yet affordability remains strained by persistently high commodity prices. Urban zones show sharp contrasts: Urban Hhohho households benefit from market proximity but remain vulnerable to fuel-driven inflation; Urban Manzini households spend up to 75 percent of income on food, leaving little for non-food essentials; Urban Shiselweni faces high staple prices and limited income opportunities despite good market access; and Urban Lubombo households struggle with elevated food prices and high expenditure shares, though those with multiple income sources show greater resilience. Overall, food access is undermined by high prices, rising fuel costs, weak and unstable incomes, and limited assistance coverage, forcing households to rely on debt, negative coping strategies, and external support from relatives or neighbours. Strengthening income diversification, expanding social protection, and stabilising food prices are critical to improving household food access and resilience.

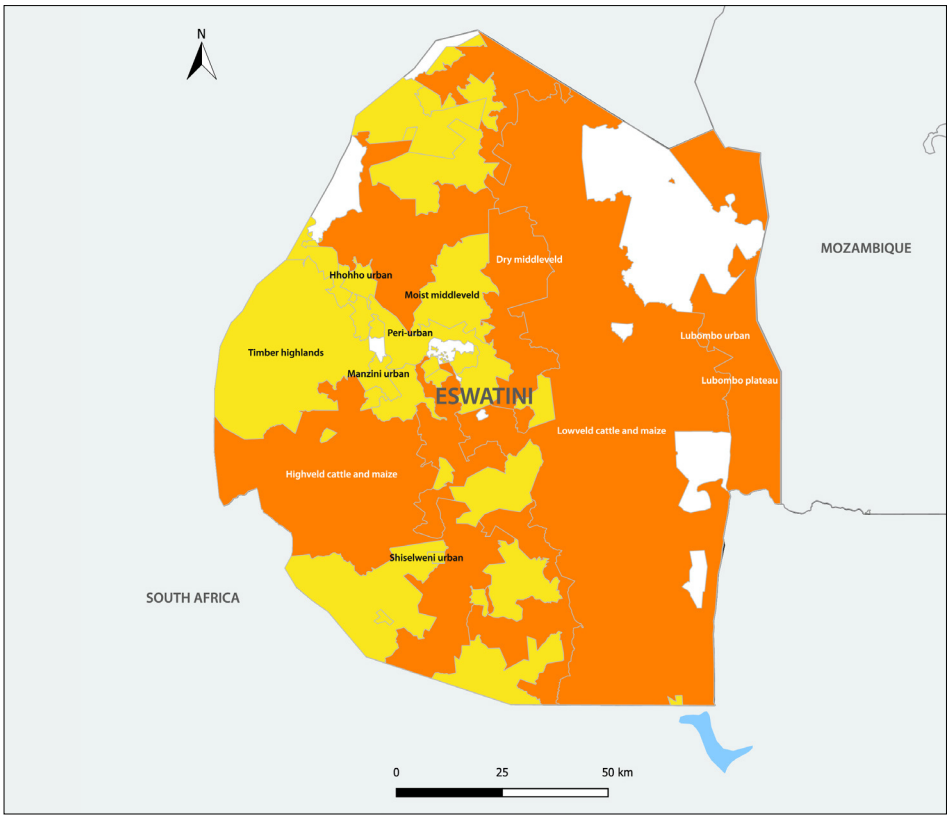
Food consumption

During the 2025/26 season, food consumption patterns across Eswatini present a mixed picture, characterised by significant geographic and livelihood-based disparities. While the majority of households maintain acceptable dietary diversity, with nearly 87 percent of households consuming between 5 and 12 food groups over the past seven days, this national average masks severe vulnerabilities in rural and agro-ecological zones, where the FCS indicates that 58 percent of households in the LCM zone and 56 percent in the Lubombo Plateau experience poor or borderline consumption (indicative of Phase 3 or above). These consumption gaps are driven by climate-related production shortfalls—including an 11-percent decline in maize yields from erratic rainfall and prolonged dry spells—and economic pressures from the global agrifood crisis, which disrupted fertiliser and fuel supply chains, raising production costs and pushing maize meal and rice prices 11-percent above the five-year average by March 2026, thereby constraining purchasing power for vulnerable households. The strain on food security is further evidenced by widespread reliance on negative coping strategies, with 15 percent of households nationally resorting to consuming less preferred foods and reducing meal sizes, while zones like the MM achieve only fragile food security through dependence on basic staples despite over half avoiding severe hunger. The livestock sector's contribution to household resilience has been compromised by the FMD outbreak, which disrupted livestock marketing and income despite improved pasture conditions. While peri-urban and urban areas generally show more stable consumption patterns, pockets of vulnerability persist, with some households experiencing severe hunger such as in DMV (29 percent experiencing moderate to severe hunger) and LCM (27 percent experiencing moderate to severe hunger) demonstrating ongoing challenges. Ultimately, while drought-tolerant crops such as beans, groundnuts, and sweet potatoes recorded significant production increases (in some cases, more than 300 percent), these gains have not offset the staple maize deficit, leaving a notable portion of the population—particularly in the DMV, HCM, MM, and LCM zones—in a cycle of food insecurity that demands strengthened safety nets and targeted interventions to improve household resilience.

Livelihood change

Across all livelihood zones, households are increasingly adopting negative coping strategies to bridge food consumption gaps, signalling a deterioration in livelihoods among vulnerable households. In the DMV 15 percent of households are already depleting assets, while the HCM and MM zones face intensified pressures from reduced employment, climatic shocks, and rising food prices, driving crisis-level coping including productive asset sales. The LCM and Lubombo Plateau face similar trajectories, with declining agricultural incomes, rising costs, and exhausted food stocks pushing vulnerable households toward unsustainable mechanisms. Urban areas present a mixed picture: Hhohho and Manzini remain relatively stable at IPC Phase 2 (Stressed), though vulnerable groups face growing strain, whereas in Urban Shiselweni approximately 35 percent of households fall in indicative Phase 3 and Phase 4 on the Livelihood Coping Strategies indicator. Urban Lubombo livelihoods are under increasing stress from drought and livestock constraints, though diversified income sources may avert widespread collapse. Overall, while the severity varies, the trend points toward increased employment of coping strategies and asset erosion across most zones, indicating that households will engage in livelihood changes—often detrimental—to meet immediate food needs, with long-term implications for resilience and recovery.

PROJECTED IPC ACUTE FOOD INSECURITY MAP AND POPULATION TABLE (OCTOBER 2026 - MARCH 2027)



Key for the Map

IPC Acute Food Insecurity Phase Classification

(mapped Phase represents highest severity affecting at least 20% of the population)

- 1 - Minimal
- 2 - Stressed
- 3 - Crisis
- 4 - Emergency
- 5 - Famine
- Areas with inadequate evidence
- Areas not analysed

Evidence Level

*** High

Projected Population Table October 2026 – March 2027

Zone	Total population analysed*	Phase 1		Phase 2		Phase 3		Phase 4		Phase 5		Area Phase	Phase 3+	
		#people	%	#people	%	#people	%	#people	%	#people	%		#people	%
Dry middleveld	149,980	59,992	40	52,493	35	29,996	20	7,499	5	0	0	P3	37,495	25
Hhohho urban	83,760	37,692	45	33,504	40	12,564	15	0	0	0	0	P2	12,564	15
Highveld cattle and maize	161,172	64,469	40	64,469	40	32,234	20	0	0	0	0	P3	32,234	20
Lowveld cattle and maize	244,732	61,183	25	85,656	35	85,656	35	12,237	5	0	0	P3	97,893	40
Lubombo plateau	47,777	16,722	35	19,111	40	9,555	20	2,389	5	0	0	P3	11,944	25
Lubombo urban	54,995	24,748	45	21,998	40	8,249	15	0	0	0	0	P2	8,249	15
Manzini urban	93,370	42,017	45	37,348	40	14,006	15	0	0	0	0	P2	14,006	15
Moist middleveld	145,499	65,475	45	50,925	35	29,100	20	0	0	0	0	P3	29,100	20
Peri-urban	108,668	48,901	45	43,467	40	16,300	15	0	0	0	0	P2	16,300	15
Shiselweni urban	51,461	28,304	55	15,438	30	7,719	15	0	0	0	0	P2	7,719	15
Timber highlands	94,211	42,395	45	32,974	35	18,842	20	0	0	0	0	P3	18,842	20
Grand Totals	1,235,625	491,898	40	457,383	37	264,221	21	22,125	2	0	0		286,346	23

Note: A population in Phase 3+ does not necessarily reflect the full population in need of urgent action. This is because some households may be in Phase 2 or even 1 but only because of receipt of assistance, and thus, they may be in need of continued action. Marginal inconsistencies that may arise in the overall percentages of totals and grand totals are attributable to rounding.

PROJECTED SITUATION OVERVIEW (OCTOBER 2026 - MARCH 2027)

The assumptions underpinning this outlook reflect a convergence of climatic, economic, and structural pressures expected to shape food security conditions during the 2026/27 projection period. Climatically, seasonal rainfall performance is projected to be normal to below normal due to a high probability of El Niño, bringing below-average rainfall, prolonged dry spells, higher temperatures, and possible in-season hazards such as hailstorms. These conditions are expected to significantly reduce maize production, particularly in the DMV, LCM, and Lubombo Plateau, while drought-tolerant crops such as sorghum, cowpeas, groundnuts, and sweet potatoes may perform relatively better. However, rising input, fuel, and transport costs are expected to further constrain production and food access, compounding vulnerabilities in rural rain-fed farming households.

The national maize deficit will need to be met through imports from South Africa and other SADC countries. Cross-border trade is expected to remain functional but subject to rising costs and exchange rate fluctuations. On the economic front, global inflationary pressures—driven by ongoing geopolitical tensions including the Russia-Ukraine conflict and heightened instability in the Middle East—are expected to sustain fuel price volatility, increasing shipping and logistics costs, disrupting supply chains, and translating into higher import costs and retail food prices for Eswatini. These factors will reduce household purchasing power and disposable income, with employment opportunities in the agricultural sector expected to decline due to rising production costs and projected drought conditions.

In the livestock sector, FMD is expected to persist at localised levels, with continued restrictions affecting livestock marketing and income generation, while rising fuel prices will increase feed and production costs, further reducing livestock productivity and household purchasing power among livestock-dependent households. Regarding WASH (water, sanitation, and hygiene) access to safe drinking water is expected to remain stable in most areas, though drought-prone communities may experience seasonal shortages, with potential risks of cholera outbreaks if contaminated water sources are used and sanitation conditions deteriorate. Nutrition outcomes in vulnerable households are expected to be negatively influenced by declining dietary diversity and food consumption in the lean season, increasing the risk of acute malnutrition across most livelihood zones, though continued access to health and nutrition services and stable Infant and Young Child Feeding (IYCF)practices may mitigate significant deterioration. Finally, food assistance interventions are expected to continue, particularly in Lubombo and Shiselweni, though ration sizes may be affected by rising food prices and operational costs, with global competing humanitarian needs posing potential funding and pipeline risks.

Collectively, these assumptions point toward heightened food security risks, reduced household resilience, and a need for targeted interventions to buffer vulnerable populations against the anticipated shocks. The number of people projected to be facing Phase 3 or above is likely to increase to around 286,000 (23 percent). All livelihood zones except for the HCM, Lubombo Plateau, MM, and TH will remain in the same phase classification, though with increased populations in Phase 3 and Phase 4. These five zones will see a growing population moving into Phase 3, while approximately 22,000 people (2 percent) will move into Phase 4, specifically in Lubombo Plateau (around 2,390 people), DM (around 7,500 people), and LCM (around 12,240 people).

Households will face challenges in meeting food consumption requirements due to limited food production. As a result of low productivity, most households' food stocks will be depleted before the projected period, meaning households will increasingly depend on markets to access food. The projected continued increase in food prices, combined with declining household incomes and rising fuel prices resulting from the 2026 conflict in the Middle East, is expected to place significant pressure on household purchasing power. This will reduce households' ability to afford enough nutritious food, thereby worsening food security and increasing the risk of malnutrition. This impact will particularly affect low-income households and those reliant on market purchases. As pressure on households increases, the share facing food gaps is expected to rise.

Key Assumptions:

Seasonal rainfall performance

During the October to March period, based on seasonal rainfall performance in the country, rains are projected to be normal to below normal due to a high probability of El Niño in the upcoming months. While lower than normal rainfall may be experienced, in-season variations, such as hailstorms, remain possible.

Crop production prospects

This period is expected to face significant challenges due to the likely development of El Niño conditions, which may result in below-normal rainfall, prolonged dry spells, and higher temperatures. These conditions are likely to reduce maize production, particularly in the DMV, LCM, and Lubombo Plateau. While the impacts of this production may be felt mostly by mid-2027, the majority of farmers and pastoralists will likely compromise on food spending to purchase agricultural inputs, fodder and hay to ensure that yields and animal body conditions are not compromised.

Food prices

Food prices are projected to increase slightly due to global inflationary pressures, as most food items are imported from South Africa. Volatility in fuel prices is also projected to increase food prices.

Impact of global conflict on prices and supply chains

Ongoing geopolitical tensions in the Middle East are expected to sustain global fuel price volatility, increasing shipping and logistics costs and disrupting global supply chains. These factors will translate into higher import costs for Eswatini, leading to increased commodity prices.

Impact of El Niño

The 2026–2027 El Niño is expected to produce similar conditions to the severe 2015/16 event, when Eswatini experienced below-average rainfall, prolonged drought, and higher-than-normal temperatures, with widespread impacts on agriculture, livestock, water resources, livelihoods, nutrition, and food security.

Agriculture and livelihoods: El Niño is expected to reduce rainfall during land preparation and planting (August–November 2026) and through the growing season (October 2026 – March 2027). Lower rainfall will likely cause poor crop performance, reduced maize production and lower household incomes, particularly among the 70 percent of smallholder farmers who depend on rain-fed and subsistence agriculture. Crop failure would reduce food availability and increase reliance on market purchases and assistance. The effects will be twofold. During the projection period, producers will likely divert spending from food to costly fertilisers and water in order to limit yield losses. The full impact on food production will become visible in the 2027 cropping season, when food insecurity is expected to rise sharply.

Livestock and pastoral systems: Water shortages and poor pasture conditions are likely to reduce livestock productivity, lower milk and beef production, and increase livestock mortality. Pasture degradation and depletion of fodder resources could further undermine the livelihoods of rural households dependent on livestock. During the 2015/16 drought, more than 80,000 cattle deaths were reported.

Water resources: Reduced rainfall will likely cause declining water levels in dams, reservoirs, rivers, and boreholes, leading to water shortages for households, agriculture, and livestock. Communities may increasingly rely on unsafe water sources, while the cost of potable water is expected to rise.

Food security and nutrition: Lower agricultural production, livestock losses, and rising food prices are expected to reduce both food availability and access, both physical and financial.

Public services and economic activity: Water scarcity could disrupt education, healthcare, and business operations, while poor sanitation and hygiene conditions may increase public health risks and sustain Global Acute Malnutrition prevalence.

Impact of the 2026 conflict in the Middle East

Ongoing geopolitical tensions in the Middle East are expected to sustain global fuel price volatility, increasing shipping and logistics costs and disrupting global supply chains. These factors will translate into higher import costs for Eswatini, leading to increased commodity prices.

Increasing cost of fuel and fertilisers from international suppliers will likely affect yields. The compounding effect of reduced precipitation during growing season in late 2026 and early 2027 due to El Niño, particularly for the main crop maize, will further limit food production and internal availability, exposing the population to volatile global food prices for key imported commodities.

With the Strait of Hormuz blockages persisting, food prices are expected to trend upward due to higher energy costs which strain vulnerable households' purchasing power.

RECOMMENDATIONS FOR ACTION

Response priorities

Short term interventions

- **Scale up emergency HFSA, nutrition support, and cash-based transfers** to households in IPC Phase 3 or above to address immediate food consumption gaps and prevent acute malnutrition. Expand targeted food assistance, supplementary and therapeutic feeding programmes, and cash-based transfers prioritising the most vulnerable households.
- **Strengthen agricultural input support and livestock disease control** to protect upcoming production and safeguard livestock-based livelihoods. Provide affordable agricultural inputs and drought-tolerant seeds aligned with forecasts, while strengthening FMD surveillance and control measures to minimise livestock-related income losses.
- **Enhance market monitoring, price stabilisation, and short-term employment schemes** to protect household purchasing power. Establish labour-based cash-for-work programmes and income-generating schemes for vulnerable households.
- **Strengthen early warning systems and emergency WASH interventions** to reduce the impacts of climate shocks and prevent waterborne disease outbreaks. Implement emergency water trucking, borehole rehabilitation, and hygiene promotion in drought-prone communities.

Medium-term interventions

- **Promote climate-smart agriculture, livelihood diversification, and market system strengthening** to reduce vulnerability to recurrent climatic and economic shocks. Scale up drought-resistant crops, conservation farming, and climate-resilient practices. Support small enterprise development, value chain integration, and off-farm income opportunities, with targeted support for youth, women, and persons with disabilities.
- **Expand social protection systems and shock-responsive safety nets** to provide support for chronically vulnerable households. Strengthen cash transfer programmes, improve targeting and coverage of social assistance, and develop mechanisms for rapid scale-up during droughts, price spikes, and other shocks affecting household food security.
- **Strengthen water security, health services, and nutrition integration** to address underlying drivers of vulnerability. Expand rural water supply infrastructure through boreholes, solar pumping systems, and rehabilitation of water points. Strengthen nutrition education, disease prevention, and access to healthcare services, particularly for households affected by HIV/AIDS and non-communicable diseases.
- **Improve disaster risk management, early warning systems, and land tenure security** to enhance community preparedness and agricultural planning. Strengthen community-based disaster risk reduction structures and early response mechanisms, Finalise and implement the policies to improve land access and tenure security for equitable agricultural production.

Long term

- **Invest in irrigation infrastructure and sustainable water management systems** to reduce dependence on rain-fed agriculture and build long-term resilience to drought. Develop strategic dams, rehabilitate irrigation schemes, and invest in water harvesting infrastructure to enable year-round agricultural production, enhance food sovereignty, and reduce import dependency.
- **Strengthen national food systems and reduce import dependency** through strategic grain reserves, agro-processing, value chain development, and sustainable livestock systems. Develop national grain storage facilities, promote domestic food production and processing, and strengthen animal health services and livestock market systems to create resilient food systems that contribute to household food security and income generation.
- **Institutionalise a comprehensive shock-responsive social protection system** that integrates early warning systems and enables rapid scale-up during crises. Develop and implement an integrated social protection framework that combines predictable safety nets with emergency response mechanisms to protect vulnerable populations against future climatic and economic shocks.
- **Develop and implement a National Resource Mobilisation Strategy and green climate financing framework** to secure sustainable funding for resilience-building interventions. Diversify revenue sources, strengthen fiscal management, and explore innovative financing mechanisms including public-private partnerships, development partner assistance, and green climate financing, and mobilise resources for climate adaptation and mitigation.
- **Invest in climate-resilient infrastructure, sustainable job creation, and human capital development** to address structural drivers of vulnerability and build a productive, resilient population. Enforce resilient building standards and improve drainage and stormwater systems, while the government, in partnership with the private sector, should invest in skills development, small and medium enterprise growth, and green economy opportunities. Strengthen health systems, nutrition programming, and education reform to enhance human capital and long-term adaptive capacity.

- **Strengthen the national food security and early warning systems** through improved data collection, analysis, and dissemination to inform evidence-based decision-making. Conduct regular assessments, improve data systems, and enhance technical capacity to ensure timely and effective responses to emerging food security threats. Additionally, promote inclusive community resilience planning through participatory approaches where communities contribute to planning, monitoring, and implementation of resilience programmes.

Situation monitoring and update

In view of the envisaged projections, it will be necessary to carry out an update of the current analysis should the projected situation change. This will be done in early November 2026 to give a situation update up to the end of March 2027. This will be an opportunity to review the impact high cost of food and non-food at household level, market functionality, transport and trade across districts/regions, the impact on household food requirements, and availability of labour opportunities, among other key issues.

Risk factors to monitor

- **Climate and weather patterns**: Monitor rainfall performance, temperature anomalies, and the frequency of extreme weather events (droughts, hailstorms, and excessive rainfall) throughout the 2025/26 season, with particular attention to the onset, distribution, and cessation of rains, as well as potential in-season dry spells that could damage crops. Given the projected high probability of El Niño conditions, close tracking of these patterns is essential for agricultural planning and early warning.
- **Food and fuel prices**: Track consumer price indices, market behaviour, and global fuel price trends, with particular attention to the impact of geopolitical tensions (2026 conflict in the Middle East and Russia-Ukraine war) on fuel price volatility, transport costs, and import prices. Given Eswatini's heavy dependence on imports, monitoring exchange rate fluctuations and regional supply constraints will be critical for anticipating inflation-driven food access constraints.
- **Household coping strategies and livelihood stress**: Monitor shifts in livelihood coping mechanisms, borrowing rates, asset depletion trends, and the proportion of households resorting to crisis and emergency strategies. With zones such as the DMV, LCM, and Lubombo Plateau expected to experience increased pressure, tracking coping strategy evolution will provide early signals of deteriorating household resilience.
- **Livestock health and market access**: Continue close monitoring of FMD outbreaks, particularly in the Shiselweni region, and their impact on livestock marketing and income generation. Also track rising feed and production costs driven by fuel price increases, which could further reduce livestock productivity and household purchasing power among livestock-dependent households.
- **Market functionality and food import flows**: Monitor cross-border trade flows, regional supply conditions, and market functionality, given the national maize deficit and heavy reliance on imports from South Africa and other SADC countries. Track transport costs, border operation efficiency, and potential regional production shortfalls that could limit import availability and drive further price increases.
- **Water wvailability and sanitation conditions**: Monitor access to safe drinking water, particularly in drought-prone communities expected to experience seasonal shortages under El Niño conditions, and track sanitation coverage and the potential risk of cholera outbreaks in communities relying on contaminated water sources, as deteriorating WASH conditions could compound health and food security challenges.

PROCESS AND METHODOLOGY

A range of multi-sectoral consultative technical meetings were held through the overall management and coordination provided by the Deputy Prime Minister's Office, Disaster Management Department. The IPC process started early 2026 with the preparation of a detailed implementation plan and establishing timelines for activities, including inventory of available information, identification of data gaps and needs for new data required for the analysis. The IPC analysis was conducted between 8 and 15 June 2026 and covered the seven rural livelihood zones of the country and urban areas in the Hhohho, Manzini, Lubombo and Shiselweni regions. The analysis was conducted by 20 participants from 14 organisations, representing five sectors. Regional experts from the IPC Global Support Unit (GSU) provided remote technical support based on the IPC Technical Manual Version 3.1 protocols. The evidence level for the analysis is High (***).

Main sources of evidence in the IPC Acute Food Insecurity analysis

The Eswatini VAC data included direct evidence for food consumption (Food Consumption Score, Household Dietary Diversity Score, Household Hunger Score and the reduced food-based coping strategies) as well as the Livelihood Coping Strategies. The Eswatini VAC assessments were designed according to the global standards, using WFP's/FAO's corporate level technical protocols, taking special consideration of data requirements for the IPC analysis. Training of enumerators preceded the actual collection of data (both primary and secondary data). Other reports from various sectors such as WASH and existing knowledge/expertise from the analysis team contributed to the IPC analysis and classification using the IPC Technical Manual Version 3.1.

Sources

The annual livelihoods and vulnerability assessment was carried out by the Deputy Prime Minister's Office between May and June 2026, the assessment provided the most current set of indicators collected through the household survey and the focus group discussions using the HEA methodology. Other sources of evidence were reports from the Government and various other sectors which were conducted prior to this analysis. Some of these reports include the Eswatini Household Income and Expenditure Survey (EHIES), the Eswatini Population and Housing Census (2017), the Agromet Bulletin, the Agriculture Pre-harvest Survey (April 2026), and other sources of secondary data.

Limitations of the analysis

The current livelihood zones overlap in some areas, which may mask the outcomes. The Urban and Peri Urban zones need further disaggregation. Sectoral data, especially on food stocks, were not interpreted properly during the field surveys. This was a major limitation in assessing the stability of households' ability to meet their food needs.

What is the IPC and IPC Acute Food Insecurity?

The IPC is a set of tools and procedures to classify the severity and characteristics of acute food and nutrition crises. The IPC consists of four mutually reinforcing functions, each with a set of specific protocols (tools and procedures). The core IPC parameters include consensus building, convergence of evidence, accountability, transparency and comparability. The IPC analysis aims at informing emergency response as well as medium and long-term food security policy and programming.

For the IPC, Acute Food Insecurity is defined as any manifestation of food insecurity found in a specified area at a specific point in time of a severity that threatens lives or livelihoods, or both, regardless of the causes, context or duration. It is highly susceptible to change and can occur and manifest in a population within a short amount of time, as a result of sudden changes or shocks that negatively impact on the determinants of food insecurity.

Contact for further Information

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Classification of food insecurity was conducted using the IPC protocols, which are developed and implemented worldwide by the IPC Global Partnership - Action Against Hunger, CARE, CILSS, CRS, EC-JRC, FAO, FEWSNET, Global Food Security Cluster, Global Nutrition Cluster, IFPRI, IGAD, IMPACT, Oxfam, SICA, SADC, Save the Children, UNDP, UNICEF, the World Bank, WFP and WHO.

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