ZIMBABWE Food Security Update

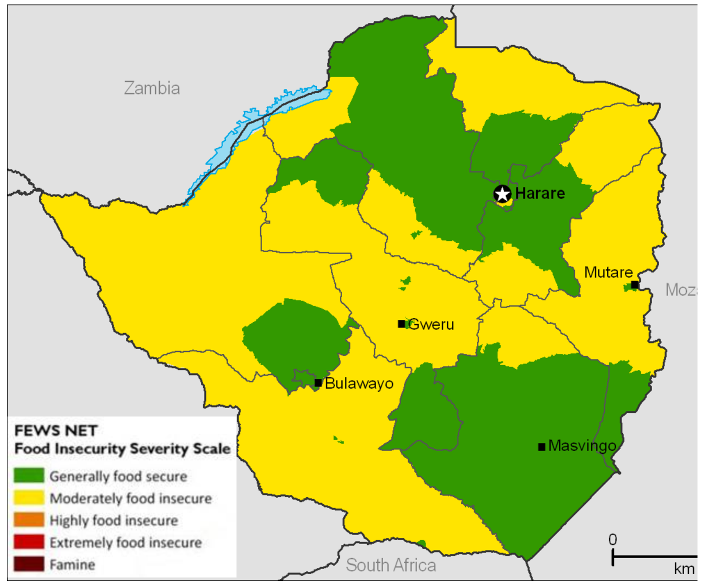
November 2009

- The food security situation in both urban and rural areas continues to be stable during October and the early part of November 2009. Food is generally available in markets throughout the country at stable prices. Growing poverty levels remain the major determinant of the current levels of food insecurity.

- An updated food security assessment by the Zimbabwe Vulnerability Assessment Committee (ZimVac) in October 2009 marginally increased the estimate of food insecure people in both rural and urban areas to about 1.74 million (15 percent) and 2.17 million (18 percent) between October-December 2009 and January-March 2010, respectively.

- WFP and C-Safe food aid programs reached out to most of the food insecure people in the rural areas in October 2009 and plan to continue scaling up in December 2009 and January 2010 to cover the food insecure population. It is worrying, however, that in November 2009, WFP is projecting a major pipeline break of more than 40,000MT of cereals between 1 December 2009 and March 2010.

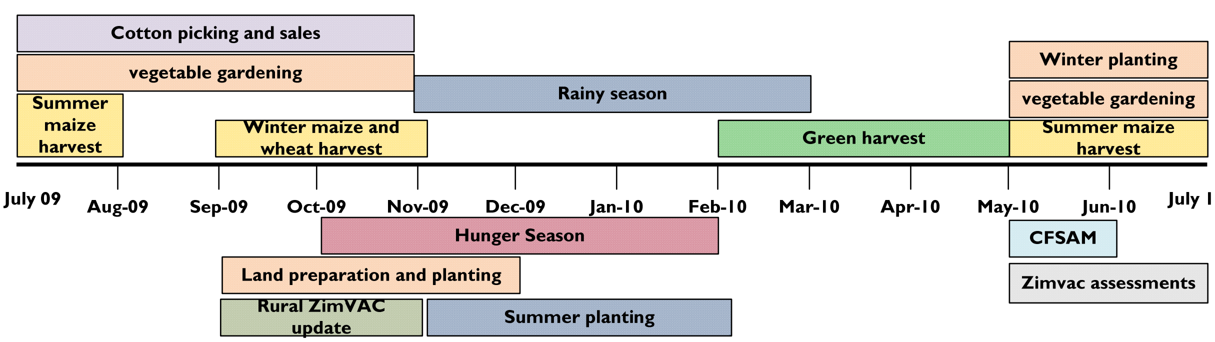
Figure 1. Current estimated food security conditions, November-December 2009



Source: *ZimVac*

- Most parts of the country received some effective rains around mid-November, as expected, marking the beginning of the 2009/2010 summer main cropping season. Maize seeds of all types and fertilizers continue to be available on the markets throughout the country at stable prices, a complete contrast to the situation in the last two seasons. Low farmer incomes due to poor prices for most crops produced by smallholders continue to constrain their ability to obtain inputs. The Government and private sector inputs loan scheme remain generally inaccessible to the majority of farmers (small and large scale), most of whom failed to provide the required collateral. The input support programs by FAO and some NGOs have partly addressed the problem by providing seeds and fertilizers to over 700,000 smallholder farmers. Recently, the Government announced an inputs subsidy scheme for the smallholder sector, details of which are still to become clear.

Seasonal calendar and critical events



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Food security overview

The situation has remained stable as a result of stable food supplies (and prices) on the markets, and healthy food stocks in most rural households. The liberalized trade of staple cereals is encouraging the flow of these commodities to deficit areas. Low incomes and limited employment opportunities remain the main cause of household food insecurity in both urban and rural areas. When food aid is not considered, an estimated 1.74 million and 2.17 million people will have insufficient food access between October-December 2009 and January-March 2010, respectively. Urban dwellers are estimated to make up 34 percent and 28 percent of the population vulnerable to food insecurity during November-December 2009 and January-March 2010, respectively.

The WFP and C-Safe food aid assistance programmes, which are expected to scale up to about 1.8 million beneficiaries by the end of November 2009 and to more than two million in January 2010, appear to cover the food insecurity problem adequately. It is critical to monitor the programs resourcing levels, as well as their coverage, to ensure that no needy areas and households are left out without assistance. However, it is worrying that WFP was, in November 2009, projecting a major pipeline break of more than 40,000MT of cereals between 1 December 2009 and March 2010.

Stable Cereals Availability

Maize, sorghum, and bulgur wheat imports by major food aid providers (WFP and C-Safe), the Government, and some private enterprises by the end of October 2009 reduced the national cereal deficit to less than 335,000MT. A recent announcement by the Grain Traders Association that they have advanced plans to import about 400,000MT before February 2010 suggests that the remaining cereal deficit is likely to be closed before the end of this consumption year.

Table 1. Cereal (maize, sorghum, and millet) balance sheet, April 2009/March 2010 (as of 30 October 2009)

DESCRIPTION		CFSAM	MOA
A	**Human requirement**	1,540,000	1,850,000
B	**Livestock and other uses**	331,000	350,000
C	**Total Annual Requirement(A+B)**	**1,871,000**	**2,200,000**
D	**Opening Stocks**	35,500	35,500
E	**Production**	1,370,000	1,510,000
F	**Commercial imports(SAGIS)**	68,292	68,292
G	**Food Aid imports**	194,734	194,734
H	**Informal imports(CFSAM estimate)**	58,000	58,000
G	**Total Available Cereals(D+E+F+G+H)**	**1,726,526**	**1,866,526**
F	**Deficit(C-F)**	**-144,474**	**-333,474**

Source: *CFSAM, MoA & SAGIS*

The relatively healthy cereal balance sheet is backed by observations of maize grain and maize meal availability on the market and in households. Both rural and urban markets continue to have healthy stocks of maize grain and maize meal. Anecdotal evidence from milling companies indicates that demand for their maize meal did not surge as it normally does in September because of low demand, which they attribute to the presence of household cereal stocks from last season's harvest.

The joint National Early Warning Unit (NEWU), Food and Agriculture Organization (FAO), and FEWSNET monitoring system shows that, in October 2009, close to 90 percent of the 158 monitored rural sites had staple cereals readily available on the market for deficit households to purchase if they had the purchasing power.

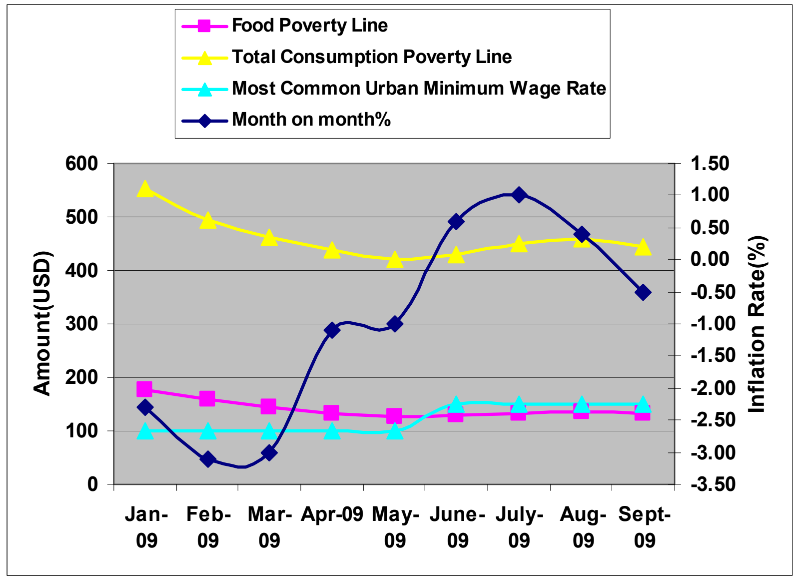
The ZimVac September 2009 food security survey indicated that over 75 percent of the surveyed rural households had cereal stock to meet more than one month's requirements for average-sized households. These were adequate to cover all the needs of the rural population to the end of the current marketing year in all provinces except in Midlands, Manicaland, and Matabeleland South.

Food aid distributions by WFP, C-Safe, and other smaller pipelines, expected to total more than 130,000MT, will improve cereal availability throughout the rural areas. Effective targeting of the food aid programs and the efficiency of the market to move staple cereals from surplus households and areas to deficit households and areas will be key determinants of the food security outlook for rural population; monitoring this will be critical in the coming months.

Household Purchasing Power

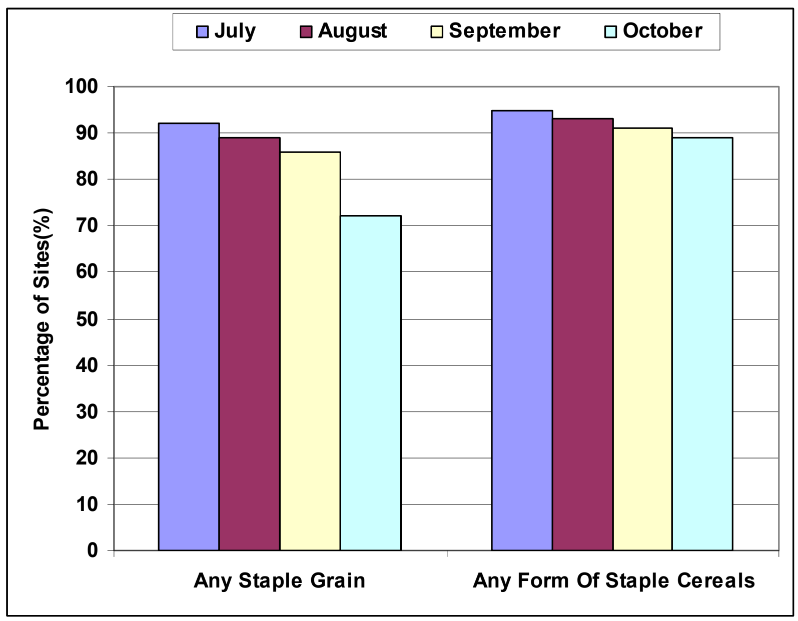
The general cost of goods and services in the Zimbabwean economy has been falling between January and September 2009. The Central Statistical Office's monthly consumer prices index was negative in six of the nine months, dropping by a total of nine percentage points between January and September 2009. Deflation has helped both the food poverty lines and the total consumption lines also fall between January September 2009. During the same period, the food poverty line fell by 35 percent and the total consumption line also decreased by 24 percent to USD131 and USD445, respectively. Staple cereal prices fell by over 400 percent during the same period, partly due to deflation but also the 2008/09 relatively decent harvest coming onto the market. In the four months from June to October 2009, retail maize grain prices remained stable, at an average of USD 0.24/kg over the 158 rural sites monitored by NEWU, FAO, and FEWSNET in 40 rural districts. Consequently, households that managed to maintain their incomes over this period experienced an improvement in their standards of living, including better access to food and other basic goods and services.

Figure 2. Minimum Wage Rates and Inflation Trends Compared with Poverty Lines



Source: *CSO and FEWSNET*

Figure 3. Staple Cereals Availability at Sub-National Level



Source: *NEWU, FAO, and FEWS NET Joint Monitoring System*

But the reduction in the cost of living has not been the same throughout the country, and both income opportunities and levels have not stayed the same for different types of households and different places. While the COS poverty lines decreased in all other urban and rural provinces between August and September 2009, the two poverty thresholds increased in Mashonaland East and Masvingo provinces. Staple grain prices continued to be lowest in the traditional higher grain-producing provinces of the Mashonaland provinces, where it averaged about USD0.20/kg between June and September 2009. In the rest of the rural provinces, maize grain prices averaged around USD0.45/kg.

The gainfully employed urban population, whose wage rates averaged about USD100/month in the first half of the year, received a boost around the middle of the year with increases between 20 and 50 percent made possible by improvements in the local economy. This improvement pushed this population group's monthly incomes above the food poverty line, but it remained significantly shy of the total consumption line. Rural households dependent on cash crops such as cotton and tobacco experienced significant income boosts between May and September 2009 from their produce sales. Not only were farmers offered generally increasing produce prices, but they were paid in cash promptly.

Rural households with livestock such as cattle (58 percent), goats and sheep (55 percent), and chickens (86 percent) also experienced a sustained appreciation in the value of their livestock assets since May 2009. Average household income from gardening activities experienced a drastic fall since May 2009, as more produce came through to a market with limited liquidity. The situation may improve for households that depend on this enterprise when the onset of the rains and dry land farming crowds out gardening, and increased garden pests and diseases infestations make it difficult to produce good tomatoes and the common leaf vegetables for most farmers. Poor households tend to rely on casual labor for their food and their income. Opportunities for this work, which had slowed down with the conclusion of the 2008/09 summer season's harvest and marketing, is expected to pick up again with the onset of the rainfall season from mid-November 2009 and the resultant cropping activities. The poor maize marketing this year may have encouraged farmers to retain more grain than they otherwise would have. This left smallholder farmers with significant cereal stocks with which to pay for casual labor this coming cropping season. Poor cereal deficit households are likely to benefit from this, particularly in the areas of higher cropping potential.

Food Insecurity

Poverty, defined by under-employment and unemployment as well as low incomes for a proportion of households in both urban and rural areas continue to constrain access to adequate food a number of rural and urban households.. Based on the revised ZimVac projections for food-insecure households in the rural areas in October 2009, FEWSNET estimates that about 15 percent of the Zimbabwean population will be food insecure from October through December 2009. This number is projected to peak at about 18 percent of the population in January, with the normal intensification of the peak hunger season. The scenario translates to about 1.7 million people from October to December 2009 and 2.2 million people at the height of the hunger period in January 2010. The urban food-insecure population is estimated to make up about 34 percent and 28 percent of the population estimated to be vulnerable to food insecurity between now and in November, and in December 2010.

Geographic distribution of the food insecure rural population

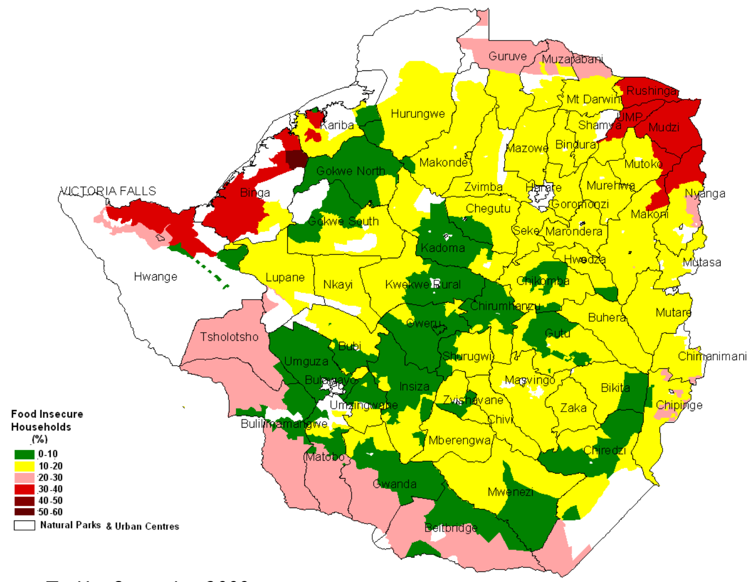
Province	Rural Pop Aug 09	Jul-Sept	Oct-Dec	Jan-Mar	% food insecure
Manicaland	1,460,402	110,596	179,656	260,251	18
Mashonaland Central	1,098,501	75,605	139,121	190,557	17
Mashonaland East	1,135,089	58,730	117,315	174,620	15
Mashonaland West	1,037,848	64,293	112,612	161,300	16
Masvingo	1,377,912	94,489	141,271	205,425	15
Matabeleland North	706,836	93,507	133,300	157,750	22
Matabeleland South	698,502	62,739	113,475	153,048	22
Midlands	1,291,056	116,236	200,280	268,849	21
Total	8,806,147	676,195	1,137,030	1,571,799	18

While the highest numbers of food insecure households were estimated to be in Manicaland and Midlands provinces, the two Matabeleland provinces and Midlands province were estimated to have the highest concentration of food insecure people. In the three provinces, between 21 and 22 percent of their rural population will be food insecure between September 2009 and March 2010. Matabeleland North was found to have the highest concentration of people (13 percent) with a food entitlement gap of more than seven months. Masvingo, Mashonaland West and East provinces were estimated to have the lowest prevalence of food insecure people: between 15 and 16 percent. However, the total caseloads in each of these provinces were estimated at more than 160,000 people — significantly higher than the food insecure populations in each of the two Matabeleland provinces.

The highest concentration of food insecure people (30-40 percent) were estimated to be in most parts of Binga, Hwange, Mudzi, Rushinga, and Mudzi districts, and the northern parts of Nyanga, Uzumba, Maramba, and Pfungwe districts. In a small part of Binga district, the food insecure population was estimated to reach 53 percent during the peak hunger period. In the northern parts of Guruve, Muzarabani, and Mt Darwin districts, most of Tsholosho, Bulilima and Mangwe districts, and southern parts of the rest of the Matabeleland South districts, 20-30 percent of the population will be food insecure during the 2009/2010 consumption year. Most of the eastern and central districts of the country were estimated to have a lower prevalence of food insecure households, ranging between 10-20 percent, mostly trending toward less than 10 percent.

If the WFP and C-Safe food aid assistance programmes expected to scale up to about 1.8 million beneficiaries by the end of November 2009 and to over two million in January 2010 are fully resourced and effectively targeted the estimated food insecurity problem can be effectively dealt with. However, it is worrying that WFP was, in November 2009, projecting some major pipeline break of more than 40,000MT of cereals in the period from 1 December 2009 to March 2010.

Figure 4. Percent of Food Insecure Population at Sub-District Level in the Peak Hunger Period (January/February 2010)

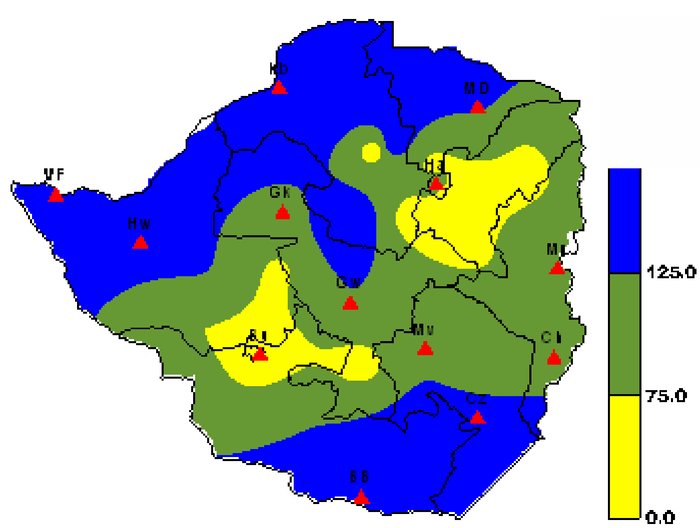


Source: *ZimVac September 2009*

Seasonal progress

As expected, most parts of the country received some effective rains around mid–November 2009, marking the beginning of the 2009/10 summer rainfall season. Most of the country had received more than 80mm of rainfall since 1 October, 2009. By 25 November, most of the country had received normal to above-normal rainfall, save for the southern half of Mashonaland East and most of the southern districts of Umuguza, Umzingwane, and Insiza. This rainfall picture is better than it was for the same period last season.

Figure 5. Rainfall between October 1 and Nov 25, 2009 as percentage of long-term average (75 -125% means normal)



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Source: *Department of Meteorological Services of Zimbabwe*

Maize seeds of all types and fertilizers continue to be available on the markets throughout the country at stable prices, a complete contrast to the situation that prevailed in the last two seasons. Low farmer incomes due to poor prices for most crops produced by smallholders continue to constrain farmers' abilities to purchase inputs. The Government and private sector inputs loan scheme remain generally inaccessible to the majority of farmers (small and large), most of whom failed to provide the required collateral. The input support programs by FAO and some NGOs are partly addressed problem by providing some seeds and fertilizers to over 700,000 smallholder farmers; more than 50 percent of the total rural households The input support programme is covering about 85 percent of the total communal area wards providing about 25 percent of the estimated amount of seed communal farmers planted in the last summer cropping season. Recently, the Government announced an inputs subsidy scheme for the smallholder sector details of which are still to become clear.

The ZimVac September 2009 survey showed that smallholder farmers plan to cope with seed access challenges by using seeds from their previous year's harvests. They also expect the Government and NGOs to come to their aid with both seed and fertilizers. A multiple response analysis of households' possible sources of seed for 2009/10 agricultural season indicates that retained (57 percent), government and purchase (43 percent) and NG0s (37 percent) will be main sources of maize seed The number of households expecting to get maize seed from NGOs is significantly higher than normal. This may be attributed to NGOs having started beneficiary registrations for the 2009/10 cropping season. NGOs were targeting to support close to 60 percent of the rural households. About 65 percent of the surveyed households already had an average of 12kg maize seed in stock; enough to plant 0.5 Ha of maize. Surveyed households in Mashonaland East (17 kgs), Matabeleland North (17 kgs), Mashonaland Central (16 kgs), and Mashonaland West (14 kgs) had above-average quantities of maize seed stocks. In the previous season smallholder farmers relied on retained seed (43 percent), purchases (28 percent), Government programs (27 percent), and carryover seeds (18 percent) to contribute to one of the best maize harvest in the last five years.

The animal daft power situation in the smallholder sector is remains unchanged from the situation in recent years. About 56 percent of the surveyed households reported having at least one draft power animal and about 50 percent of the households had at least two animals to pull farm implements. Cattle continue to be the main form of draft animals used by smallholder farmers throughout rural Zimbabwe. Only 13 percent of the surveyed households own donkeys for draft power. Fuel for mechanized draft power is readily available on the market throughout the country, though equipment maintenance and hiring costs may present a challenge to many farmers.

On the whole the 2009/10 is starting on a much better note than any of the recent past three seasons. It is very critical to monitor progress on planting of major crops in the next two months to get a better sense of the impact of constrained market liquidity. Since the bulk of the summer cropping is rain fed and the irrigation infrastructure capacity was reducing during land redistribution the quality of the season is ever more critical to the success of the cropping season.

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

Maize grain, maize flour, cooking oil, and sugar represent the most important food commodities consumed by poor households. The Mbare market in Harare is where a very large percentage of the most vulnerable households procure their basic commodities.