Food deficits projected for poor households due to constrained food and income sources

KEY MESSAGES

- Crisis (IPC Phase 3) food security outcomes are expected across most typical deficit crop-producing areas in the south, west, and extreme northern regions of the country between August 2018 and January 2019. Typical surplus production areas will be Stressed (IPC Phase 2) throughout the outlook period. Projected outcomes during the outlook period are driven by the 2017-18 below-average to average production levels, the resulting decrease in income from casual labor and other sources, as well as the ongoing liquidity challenges.

- At the national level, 2018 production combined with carryover stocks from the 2017 season will bring maize supplies to above-average levels. However, deficits are expected later in the marketing year. Maize prices are projected to remain below average until August/September, and trend near the seasonal averages for the rest of the outlook period as demand increases.

- Early international forecasts for Southern Africa indicate increased probabilities for El Niño-induced below-average rainfall for the 2018-19 season. Although there is some uncertainty in this forecast, poor rains will likely affect livelihood activities from October 2018 to January 2019.

SEASONAL CALENDAR FOR A TYPICAL YEAR

![Seasonal Calendar for a Typical Year](image-url)
NATIONAL OVERVIEW

Current Situation

2018 Agricultural Seasonal Update

Across most parts of the country, harvesting of early-planted crops is complete or still ongoing. Over 80 percent of the 2017-18 maize crop was reportedly planted in November and December 2017. Late-planted crops that were cultivated in January and February are beginning to be harvested and this is expected to extend into July. Assessments from various agencies, key informants, as well as FEWS NET analyses indicate that for most communal farmers the 2017-18 production levels for cereals and other crops are lower when compared to both last year and the five-year average. Below average to average production is reportedly being realized in other farming sectors.

Water tables, river, and dam levels remain high following heavy rains in February and March, especially in the north and other high rainfall areas. Most reservoirs already had above-average water levels due to above-normal rains from the previous 2016-17 season. However, some traditionally arid areas in the south and west (including most of Masvingo, Matebeleland North and South, and parts of Manicaland and Midlands Provinces) and extreme northern areas (in the Mashonaland Provinces) have already started experiencing water availability and access challenges.

Small livestock conditions are good across most parts of the country, even in typical arid areas. Pastures are fair to good in most high rainfall areas and so are cattle conditions. However, in parts of the south, west, and extreme north, pastures are fair to poor, along with cattle conditions. Some farmers are already feeding their livestock with crop fodder, while others are stocking up on fodder as stock feed reserves for the 2018-19 lean season.

Tobacco sales continue at the auction and contract floors. In tobacco-growing areas these sales are improving household income levels. Cotton harvests and sales have also started, though production levels are expected to be lower compared to last year. As an incentive for production, tobacco and cotton farmers are expected to earn respectively 12.5 and 10 percent export incentives on their crop.

Economic Situation

The macroeconomic environment remains stressed with negative impacts on poor household livelihoods, incomes, and access to food and other basic needs. Foreign currency shortages in formal markets as well as reliance on black market supplies continue to affect production, prices, and service levels in the formal and informal sectors. With the ongoing cash shortages, consumers are increasingly using electronic and mobile money transfers for purchases thereby paying more through high premiums charged as compared to paying in US Dollars. As a result, the prices of most goods and services are above normal and continue to increase. Figure 1 shows cooking oil price trends for select districts and the increases in average prices since January and February 2018.
Internal Cereal Trade and Market Functioning

In recent years, apart from the 2016-17 cropping season, national cereal deficits were experienced. Currently, the country has significant carryover stocks from the 2016-17 cropping season. The Grain Marketing Board (GMB) is reported to be holding over 900,000 MT of maize from the 2017 harvests and imports. Some open markets have up to now continued to rely on 2017 maize harvest supplies, while others in traditionally deficit-production areas no longer have stocks. Supplies from the 2018 harvests are beginning to make it into the markets.

Food security

Only a small proportion of better-off households in surplus-production areas still have 2017 carryover stocks. Current harvests in these areas have improved food and incomes as well as consumption, even for poor households. Own-produced crops are the main source of food in these areas and opportunities for in-kind labor are also moderately available. However, in marginal production areas in the south, west, extreme-north, and other areas, own-produced food stocks are limited for poor households, resulting in poor consumption. Some households in deficit-production areas continue to make cereal purchases. Due to constrained livelihood opportunities, poor households continue to employ consumption and livelihood coping strategies early in the 2018-19 consumption year.

Seasonal activities including gardening, brick molding, construction, and self-employment engagements (e.g. crafts and sale of forest products like grass) have started and are increasing across parts of the country. Unfortunately, some of these activities are being affected by cash shortages and low demand, as well as water availability and access challenges in the arid parts of the country. As of June, the Government of Zimbabwe’s extended drought relief program continues to supply selected vulnerable households in rural communities with maize grain. These maize grain distributions were originally supposed to have ended in March.

National Level Assumptions

From June 2018 to January 2019, the projected food security outcomes are based on the following key assumptions:

2017-18 national cereal production: FEWS NET anticipates below-average to average national cereal production from the 2017-18 cropping season. This is mainly due to the impact of a slow and late onset of seasonal rains, poor rainfall distribution, and a prolonged mid-season dry spell in December and January. Significant rainfall was received in February and March across the country. These rains improved crop conditions in parts of the country, but in some areas much of the crop had already been lost. Dry conditions persisted in part of March and April in some southern districts, further stressing crops (Meteorological Services Department). Though cumulative rainfall was relatively normal for the bulk of the country and ranged from 75-125 percent of the long-term average, temporal and spatial distribution of rainfall was poor across the country.
National cereal availability: National cereal stocks are expected to be above-average for the 2018-19 marketing and consumption year because of the above-average carryover stocks from the 2016-17 season. The GMB currently has reportedly over 900,000 MT of maize because of above-average (140 percent) maize production during the 2016-17 cropping season. Despite anticipated below-average to average 2017-18 national production, formal maize imports are expected to remain at below normal levels as carryover stocks and 2018 harvest supplies are expected to meet national demand during the early part of the current marketing and consumption year. A relatively small national cereal deficit is likely later in the marketing and consumption year. The government is likely to continue to require that private traders and millers source local maize only from the GMB.

Household cereal availability: Own-produced cereal stocks (maize and small grains) for poor households in most southern and other typical deficit-production areas will last between 1-3 months. Some households will have no harvests. Household stocks for other crops such as groundnuts, round nuts, and cowpeas in these areas are also expected at below-average levels. By August, it is expected that own-produced food stocks would be depleted for most poor households. Purchases are expected earlier than typical, though at constrained levels due to poor incomes. Households will expand their livelihood activities (including casual labor and remittances) to obtain income for purchases. In the north and other high-producing areas, own-produced cereal stocks for poor households will last longer (up until November/December), which is still earlier than usual. However, in some areas, other food crops such as sweet potatoes, groundnuts, round nuts, beans etc. are expected to complement household cereal supplies.

Livestock conditions: As is typical, small livestock are expected to be in good condition across most parts of the country, even in arid southern and other areas throughout the outlook period. However, cattle conditions in the south and other typically arid areas are expected to deteriorate starting around July as pasture and water conditions begin to decline. Minimal fodder supplies from the 2017-18 crop stalks are expected in these areas from July/August due to the poor cropping season. In some areas cattle will rely more on dry tree-leaf browsing than on grazing. Where available, higher-income households are expected to purchase supplementary feeds, which poor households will not be able to afford. Most feedlots in such areas are poorly managed and degraded. Draught animals are expected to be in poor condition from September to December, affecting draught power services. In most northern areas, pasture and water supplies are expected to sustain good cattle conditions until the start of the rains, which are expected around October/November.

Macroeconomic conditions: Constrained economic activity, foreign currency shortages, high parallel market exchange rates, multiple-pricing systems, and poor livelihoods and household incomes will likely persist during the outlook period. High prices for food and other basics are likely to continue, impacting poor household purchasing power. Macroeconomic conditions will also have impacts on the following livelihood activities and income sources:

- **Agricultural and non-agricultural labor availability and rates:** Ongoing macroeconomic challenges, cash shortages and below-average to average crop production will affect opportunities for on-farm casual labor (e.g. land preparation, ploughing, planting and weeding) from October through January and off-farm casual labor opportunities. This will be compounded by above-average labor supply which will result in below-average labor rates, especially in southern and other typical deficit-production areas. Below-average crop production will affect in-kind payments for labor due to low stocks and incomes that middle and better-off households will receive from their crop sales. In-kind payments with non-cereal items such as sugar and washing soap will be most likely.

- **Remittances:** Remittance flows, both domestic and international, are expected at below-average levels during the outlook period. Constrained economic opportunities in the country as well as cash shortages will affect the frequency and levels of remittances in rural and urban areas. Remittances from mainly South Africa to households in southern districts will be impacted by weak exchange rates of the South African Rand to the USD as well as economic challenges faced by most immigrating to South Africa. Remittances are more likely to be in-kind than in cash in the southern districts.

- **Livestock-to-grain terms of trade:** Unfavorable livestock-to-grain terms of trade are expected from August onwards as cereal prices increase due to increased demand. These unfavorable terms of trade will be more so in grain-deficit areas compared to grain surplus-areas. Some distress sale or disposal of livestock is expected especially between September and November. Terms of trade will likely be below-average for the entire outlook period due to low effective demand for livestock and ongoing cash shortages.
Other livelihoods: In typical arid areas gardening and informal mining activities (e.g. gold panning) will likely be affected from June through October/November due to expected water challenges. The sale of wild products (e.g. thatching grass, seasonal fruits, fish etc.) will be affected in some areas because of the poor rainfall season. Petty trading and self-employment activities such as crafts and beer brewing are likely to be impacted by low effective demand due to low household incomes. Labor migration will remain an option, especially for households located close to the national borders.

Prospects for 2018-19 main season production: Early international forecasts indicate that the most likely El Niño-Southern Oscillation (ENSO) phase for October 2018 to January 2019 is El Niño, but there is some uncertainty in this forecast. Based on the El Niño forecast and looking at relevant analogue years, below-average rainfall is most likely from October 2018 to January 2019. In addition, there is an increased probability for a late start of the rains in some areas, which are likely to be erratic in terms of spatial and temporal distribution. Due to current uncertainties, this forecast may shift in the periods closer to the start of season. In addition to the seasonal rainfall forecast, the following factors will also impact production during the cropping season.

- Migratory Transboundary Pests and other diseases: The Fall Armyworm (FAW) is expected to remain a threat to crop production in the coming season. Other pests include Quelea birds, large grain stalk borer, and wild animal attacks on crops, livestock, and humans in parts of the country. Typical livestock diseases such as foot and mouth, anthrax and others will also likely affect herds in various areas, with Newcastle a potential threat to poultry. Below-average household incomes will affect access to appropriate chemicals and could impact potential production.

- Crop input supply and access: As foreign currency shortages persist, it is likely that fertilizer shortages will continue to be experienced on the markets during the outlook period as fertilizer companies face challenges in importing raw materials. Because of prevailing economic challenges, low household incomes and high crop input prices, most poor households are expected to have poor access to crop inputs for the 2018-19 cropping season. This may result in delayed plantings and reduced cropped area.

Integrated price projections for maize grain and maize meal: From June to September, maize grain prices are projected to range from average to below average because of carryover stocks and 2018 harvest supplies. As local demand increases between October and January, prices are expected to trend close to average because of limited supplies from traditional source areas and the below average to average 2017-18 harvest supplies. Figure 3 shows maize grain price projections for Mbare Market in Harare. Maize meal prices are expected to remain stable throughout the entire outlook period if the government continues to require that private traders and millers source local maize from the GMB. Wholesale and retail stocks are anticipated at average to below-average levels. Even with expected below-average to average maize meal prices, poor households will not be able to afford maize meal purchases, especially in typical grain-deficit areas.

Humanitarian Assistance: Currently, no assistance is planned, funded, or likely for the outlook period. FEWS NET will be updating this assumption as new information emerges.

Acute malnutrition: Typical national acute malnutrition prevalence in Zimbabwe is 3.3 percent which is Acceptable according to the WHO Crisis Classification. The 2018 National Nutrition Assessment reported a national Global Acute Malnutrition (GAM) prevalence of 2.5 percent. This prevalence indicates a continued Acceptable level which is also lower than the average prevalence spanning more than five years. The national GAM prevalence is likely to remain at current levels from June...
through September 2018, but may likely increase thereafter, yet remain at Acceptable levels. Malnutrition levels are likely to be seasonally influenced by diseases, but illnesses are unlikely to reach epidemic proportions.

**Most Likely Food Security Outcomes**

**June - September:** In northern and other typical surplus production areas, below-average to average crop production is expected. Poor households in these areas will mainly rely on own-produced stocks. Opportunities for casual labor will be limited by crop production levels. Some households in these areas will experience Minimal (IPC Phase 1) outcomes between June and July, but the area classifications will be driven by very poor and poor populations that are unable to meet their non-food needs, resulting in Stressed (IPC Phase 2) outcomes. Stressed (IPC Phase 2) outcomes are also expected to continue during the months of August and September. In the south and other perennial deficit production areas, 2018 harvests will be below average, affecting casual labor opportunities and labor rates, cash and in-kind. Most poor households will engage in earlier than normal consumption coping strategies as well as extend their typical livelihood coping options. Stressed (IPC Phase 2) outcomes are projected as poor households rely on own-produced food stocks yet face livelihood protection deficits. In a few critical districts, Crisis (IPC Phase 3) outcomes are projected once poor households deplete their food stocks in July/August. These area outcomes are expected through September in an increasing number of districts. Humanitarian assistance will be required to protect livelihoods.

**October 2018 - January 2019:** This outlook period covers the lean season during which consumption patterns and food security outcomes are expected to deteriorate in the south and other typical deficit-production areas. With current forecast for below-normal rainfall for the 2018-19 season, seasonal on-farm labor opportunities will be constrained. Other typical livelihoods such as self-employment will also be affected by poor demand for products and services. Incomes from livestock sales will be below average, and yet livestock to cereal terms of trade will worsen as cereal prices increase with demand. As a result, Crisis (IPC Phase 3) food security outcomes are expected to persist. It is possible in some areas for some pockets of households to experience Emergency (IPC Phase 4) outcomes. In the northern and other grain-surplus production areas, household food stocks are expected to last until December for poor households. Limited income and in-kind payments from on-farm casual labor will supplement the depleting food stocks among households, but most poor households will not be able to meet their livelihood protection needs, resulting in Stressed (IPC Phase 2) outcomes in most areas.

**AREAS OF CONCERN**

**Save River Valley and Ndomoyo Communal (SRVNC) Livelihood Zone, Chipinge District, Manicaland Province**

**Current Situation**

In Chipinge District the SRVNC Livelihood Zone makes up about half of the 30 wards in the district (Wards 4, 16, 20-30) These are low-lying, hot, typically low rainfall, drought-prone, and chronically food insecure areas along the Save River Valley under Natural Regions IV and V. Additional information on the major characteristics of the SRVNC Livelihood Zone can be found in the Zimbabwe Livelihood Zones Profile. As was the case for most districts in the country the area experienced a poor 2017-18 rainfall season. Up to January most farmers did not manage to plant due to insufficient moisture. For those that planted during the first half, germination was poor. The December to January prolonged dry spell caused severe moisture stress to the early-planted crops and resulted in complete write-offs in some wards. Selected farmers in all wards received crop input assistance through government’s Presidential Crop Input Scheme comprising maize seed and Compound D fertilizer. Targeted farmers also received inputs for cotton and soya beans (seed and fertilizers). Farmers used retained seed for sorghum and pearl millet production.
The month of February experienced heavy and persistent rains which caused water logging especially on the heavy alluvial soils resulting in boggy conditions which affected on-farm activity. Leaching was experienced in areas with lighter soils. Some farmers, especially in the southern wards of the livelihood zone started their first plantings with the February rains, which was very late in the season. Most of the February plantings were affected by mice, which fed on the planted seeds, resulting in re-plantings, as well as poor crop stands. Fall Armyworm (FAW) also affected mainly the late planted crop across most wards and according to district agricultural authorities, the FAW infestation and coverage was higher in all wards in the district during the 2017-18 cropping season compared to last season and affected maize, sorghum and pearl millet. The government spraying interventions were limited to a few wards due to resource shortages, though extension officers in all wards were trained on the scouting, identification and management of the pest.

Throughout March and April, dry conditions prevailed in SRVNC in Chipinge, affecting both the early planted as well as the late (February) planted crop. Up to end of May much of the late planted crop was still in the reproductive stages and showing signs of water stress and reduced chances of the crop reaching full maturity. Sorghum and pearl millet crop in most wards have also been affected by hordes of Quelea birds.

The main market in the zone is Checheche Growth Point. There are huge maize grain stocks and a high number of traders at the market. In May maize grain was being sourced from the Chipinge Highlands as well as from across the border in Mozambique. Grain from Mozambique was relatively cheaper (around $2.50/17.5 kg bucket, or $0.14/kg) compared to $3-4/bucket ($0.17-$0.23/kg) in the Chipinge Highlands. At Checheche maize grain was selling for $4/bucket ($0.23/kg) or $5/bucket ($0.29/kg). Traders accepted the $4/bucket if it was cash, however, if a buyer offered to pay using mobile money transfer (Ecocash), the traders insisted on $5/bucket, or even $5.50/$6. Maize grain was available in small stocks at the smaller markets in the zone such as Kondo and Manzvire Business Centers at $5/bucket ($0.29/kg) for cash payments or $6 ($0.34/kg) using mobile transfer.

Most of the smaller markets in the more remote parts of the zone had no maize stocks. A few traders would occasionally bring maize on trucks for sale in such areas, charging $7/bucket ($0.40/kg), a steep price for poor households with poor incomes. Small grains were available only at Checheche Growth Point. Sorghum went for $5/17.5 kg bucket, with pearl millet costing $6/bucket. Maize meal was available on the key markets. Most smaller markets especially in the more remote parts of the wards had no stocks due to low demand as households preferred to buy maize grain compared to maize meal. Because of a three-month extension of the 2017/18 lean season assistance in this area, grain distributions were ongoing at the time of FEWS NET’s field assessment.

Poor performance of the 2017-18 rainfall and cropping season have limited potential for agricultural labor opportunities in the livelihood zone. Labor opportunities outside the zone are also limited due to prevailing cash shortages. Some middle and better-off households have not recovered from high cattle losses due to drought two years ago. As a result, cattle sales are low as well as incomes. Some households from all wealth groups have also lost goats and chickens due to diseases, with Newcastle affecting chickens.

Most seasonal streams and water points are dried up or have limited water. Due to increasing water challenges there is rising pressure for water for humans, livestock and other livelihood uses.
especially on boreholes across most wards, affecting vegetable production, brick molding and sales (apart from low demand due to constrained household incomes).

Petty trading activities in the zone involve buying and selling of vegetables, fruits, dried fish (from Mozambique and Harare), second hand clothing items, and other personal and household wares. Incomes from petty trading are generally low due to poor capital (for stocking), poor demand and high competition among a high number of traders. Remittances are also below normal mainly due to prevailing economic challenges as well as the poor exchange rate for the South Africa Rand against the US Dollar.

As of May, most very poor and poor households had poor consumption. Own-produced stocks were long exhausted in 2017. Harvests from the current crop are yet to come as most farmers planted late in February. The few households that planted early and had harvested realized very low production. Purchases are limited due to poor incomes. As a result, most poor households are having a maximum of two meals a day made up of sadza (staple cereal) and vegetables (fresh or dried). Even beneficiaries of government food assistance maize distributions (up to June) are seriously conserving on stocks. Skipping meals, limiting portion sizes, and preferential feeding of children is common. Based on FEWS NET’s HEA Outcome Analysis for SRVNC in May, total income (food and cash) for poor households in the zone are shown in Figure 8. Poor households face both survival and livelihoods protection deficits. The middle and better-off households have better consumption and consumption patterns, with some having up to three meals a day.

Assumptions for Save River Valley and Ndowoyo Communal Livelihood Zone

In addition to the national-level assumptions, the most likely scenario for very poor and poor households in this livelihood zone are based on the following assumptions:

- **Agricultural, non-agricultural labor & self-employment:** reduced incomes and crop harvests for the better-off and wealthy households will result in reduced demand for casual labor and self-employment services throughout the outlook period. This will be worsened by the increased number of poor households chasing for limited labor opportunities, resulting in below-average labor rates, household incomes and access to food on the markets.

- **Below-average crop production:** This is a result of factors described under the current situation section. Own-produced cereal stocks for poor households are expected to last at most two months or up to July when demand on markets is expected to increase.

- **Below-average market supplies of cereals:** there will be an earlier than usual increase in demand of maize on the markets from July/August through January. Carryover stock supplies from the typical source areas in the Chipinge Highlands will likely reduce and be exhausted by June. From June markets will be supplied from the 2018 harvest projected at below normal levels. Later in the marketing season e.g. December/January, traders may start sourcing from more distant markets (e.g. the Mashonaland Provinces or imports). Maize grain availability on markets in the remote parts of the district will likely be poor throughout the outlook period.

- **Maize grain prices:** because of anticipated below-average production, post-harvest maize grain prices are expected to only marginally decline from the May levels. This is also because the prices in the 2017-18 consumption year were already lower than the 2016-17 marketing season as well as the average prices. With increased demand, traders will most likely focus on the more accessible markets. Where available, prices in these remote areas will increase significantly. As a result, prices are expected to increase as is typical (from around July/August). However, even with anticipated average to above-average prices later in the consumption and marketing season, macroeconomic
challenges, poor household incomes and cash shortages are likely to place a below-normal ceiling to maize grain price increases as compared to previous years. Figure 7 shows the price projections for Chipinge through January. Maize meal prices will likely remain stable throughout the outlook period as the GMB is expected to be the main if not sole supplier for private millers as per government policy.

- Poor water, pasture conditions, and livestock diseases: poor water and pasture conditions from July through October across the zone will lead to poor livestock condition (especially cattle). This will likely affect draught power between November and December and consequently cropped area for affected and other households. Because of poor cattle condition, prices are likely to be below normal affecting incomes for middle and better-off households, with a trickle-down effect on poor households. In addition, livestock diseases for cattle, goats and chicken will affect household incomes across all wealth groups. Crop destruction and livestock attacks by wild animals in areas close to games parks and conservancies will affect livelihoods.

**Most Likely Food Security Outcomes for the SRVNC Livelihood Zone**

**June to September:** Between June and July, poor households are expected to rely on very limited own-produced food stocks. Consumption will be poor and mainly include cereal (sorghum/millet/maize) meals with vegetables. In June some households will consume maize grain distributed by government. As a result, Stressed (IPC Phase 2) food security outcomes are expected between June and July. From August through September, own-produced stocks will be exhausted and poor households are expected to engage other sources of food such as casual labor. Purchases will be very limited due to poor livelihood options and incomes. Gardening activities are likely to be limited to between June and July due to water challenges. Brick molding, construction and self-employment activities are also likely between June and September, though at limited scope due to constrained demand as well as poor water availability in most places across the zone. Petty trading of various wares is likely to be common throughout this outlook period (June to September), but incomes will be low and erratic. Hence consumption will remain poor and will still be cereal-based. The number of meals per day is expected to further reduce. Crisis (IPC Phase 3) outcomes are expected for August through September.

**October 2018 to January 2019:** From September through October, consumption will remain poor as sources of food such as casual labor opportunities will be limited. Beginning November to January agricultural labor opportunities (land preparation from October-December, planting in November and December, and weeding from November to January) will be affected because of forecasted below-normal rains and cash shortages. From January, anticipated green harvest (maize, pulses, seasonal vegetables etc.) will also be minimal. Other livelihood options will continue to be constrained, yet cereal prices are expected to have increased on the markets. As a result, Crisis (IPC Phase 3) food security outcomes are expected during the outlook period.

**Table 1. Monthly Acute IPC Phase Classification for Chipinge district, June 2018 to January 2019.**

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*Source: FEWS NET*

FEWS NET classification is IPC-compatible. IPC-compatible analysis follows key IPC protocols but does not necessarily reflect the consensus of national food security partners.
**Beitbridge South Western Lowveld Communal (BSWLC) Livelihood zone, Matobo District, Matabeleland South Province**

**Current Situation**

The BSWLC Livelihood Zone in Matobo District covers Wards 1-14, 19 and 20 under Natural Regions IV and V. The livelihood zone is semi-arid and heavily dependent on livestock. The arid climate conditions restrict cropping. Casual labor is a major livelihood option for poor households. Proximity with the South Africa and Botswana border opens significant employment opportunities. Sorghum cropping, mopane worm sales and gold panning supplement wage earnings of the poor. Additional information on the major characteristics of the BSWLC Livelihood Zone can be found in the *Zimbabwe Livelihood Zones Profile*.

Matobo District experienced a late start of season, up to 40-60 days from normal (*Meteorological Services Department*). Average rainfall received across the district for the 2017-18 rainfall season amounted to 360 mm, 20-40 percent lower than normal (Figure 10). There was a prolonged dry spell during the period December through January with the longest lasting up to 65 days in parts of the district (agriculture authorities). There was increased rainfall in February which regenerated some crops, but an estimated 12 percent of maize had been completely written off. Area put under major crops in Matobo District in 2017-18 was close to average. Some farmers did not plant at all due to the late start of rains and prolonged dry spells. A significant proportion could not use crop inputs received from the government and retained them for the coming season.

Table 2 shows production estimates for major crops in the district. Cereal production decreased compared to the previous year and the five-year average. Maize was 37 percent below last year and stable against the five-year average. Sorghum and pearl millet however were 79 percent and 67 percent below last year whilst also 44 percent and 55 percent below the five-year average, respectively. Groundnuts and round nuts production was above last season and the five-year average mainly due to the increased cropped area this year. According to the official 2018 crop production report, the district has 4-6 months of cereal sufficiency.

The average maize grain price in May was $0.46/kg though maize was mostly unavailable across the district. This price was about 20 percent below the same time last year and 10 percent below the five-year average. Maize meal was available at both large and small business centers in the district. Maize meal averaged $0.44/kg for the *Silo* brand (GMB) and other locally milled brands. Local millers mainly sourced their maize grain from the GMB, with others from resettlement areas. Small grains mainly available in Maphisa included pearl millet ($0.68/kg) and rapoko ($2.29/kg), with the high price of the latter being due to very limited stocks.

Pasture conditions are generally poor with cattle depending more on shrubs than graze. Water availability and access is a challenge with between 4-5 km distances to water points. Cattle conditions are however good despite reports of foot and mouth disease in the district. Goats are in good condition as well. An average head of cattle cost $400 whilst goat sold for $40 and chickens for $5 in May.

On-farm casual labor opportunities such as harvesting were limited due to poor
harvests. Vegetable sales is a typical livelihood, yet observations and key informant evidence indicate an increase in participant households as both a livelihood and coping strategy. However, watermelon sales which are common this time of the year were not available due to the poor rainfall season. Self-employment activities include firewood gathering and sales (e.g. $20 a scotch cart) as well as brick molding and sales ($100 per 1,000 bricks).

Such opportunities are however limited due to low demand. Remittances (especially from South Africa and Botswana) were very infrequent and amounts were low. Reports indicated most emigrants were struggling to sustain themselves and secure good jobs in the neighboring countries. Poor households were therefore experiencing strained livelihoods to the extent that some are selling productive assets such as farming equipment and unused crop inputs, and others were withholding children from school for failing to pay fees and meet other school costs. The Department of Social Welfare through the GMB was providing food assistance to 5,270 households in the form of 50 kg of maize per household per month.

Consumption patterns for most poor households in Matobo comprised of cereals, vegetables, mainly dried pumpkin and cow pea leaves. The number of meals per day was mostly limited to two and preferential feeding of children was common. Food purchases were very limited due to poor incomes.

**Assumptions for Beitbridge South Western Lowveld Communal (BSWLC) Livelihood zone**

In addition to the national-level assumptions, the most likely scenario for very poor and poor households in this livelihood zone are based on the following assumptions:

- **2017-18 cereal availability:** district cereal production in Matobo is reported to be lower than average for major crops. Consumption of own-produced crops will last at most 2-3 months for poor households. Some households did not harvest anything because farmers did not plant or had high complete crop write-offs. By August, most poor households would experience food deficits and resort to other sources of food.

- **Livestock condition and sales:** Goats are expected to be mainly in good condition till November when the next rains are expected. However, though cattle have adapted to browse than graze, poor pasture condition will result in good to fair condition from June through September. By October/November cattle conditions are expected to deteriorate as both browse and water conditions worsen. Goat sales are however likely to be lower than average due to the over-selling in the previous drought seasons. However, distress sales will continue as other livelihood options are expected to be constrained. Livestock to cereal terms of trade will likely be lower than average during the lean season period (October to January) as cereal prices increase with demand. Black leg, heart water, Newcastle and Foot and Mouth Disease are expected during the outlook period, impacting livestock conditions and prices.

- **Other livelihoods:** Increases in self-employment activities, e.g. selling of wild fruits and foods such as mopani worms and firewood are expected. Incomes from these sources will likely be low due to high competition. Labor migration to neighboring countries and main towns like Bulawayo and Plumtree is also expected, with some household members engaging in petty trade activities.

- **Maize meal prices:** The prices of maize meal will likely continue to trend closer to the five-year averages from June through September. Expected price increases during the lean season will likely be subdued by cheap imports from mainly South Africa. Maize meal prices will therefore likely trade below-average to average from October to January.

### Table 2. Matobo district crop production trends.

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<th></th>
<th>2016-17 (MT)</th>
<th>2017-18 (MT)</th>
<th>Five-yr. avg (MT)</th>
<th>% change to five-yr. avg</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maize</td>
<td>6,969</td>
<td>4,371</td>
<td>4,325</td>
<td>1</td>
</tr>
<tr>
<td>Sorghum</td>
<td>4,265</td>
<td>915</td>
<td>1,639</td>
<td>-44</td>
</tr>
<tr>
<td>Pearl Millet</td>
<td>1,391</td>
<td>454</td>
<td>998</td>
<td>-55</td>
</tr>
<tr>
<td>Finger Millet</td>
<td>36</td>
<td>1</td>
<td>13</td>
<td>-92</td>
</tr>
<tr>
<td>Groundnuts</td>
<td>1,122</td>
<td>1,408</td>
<td>516</td>
<td>173</td>
</tr>
<tr>
<td>Cowpeas</td>
<td>314</td>
<td>180</td>
<td>132</td>
<td>36</td>
</tr>
<tr>
<td>Roundnuts</td>
<td>388</td>
<td>1,188</td>
<td>279</td>
<td>326</td>
</tr>
<tr>
<td>Sweet Potatoes</td>
<td>1,748</td>
<td>2,041</td>
<td>1,058</td>
<td>93</td>
</tr>
</tbody>
</table>

*Source: Ministry of Lands, Agriculture and Rural Resettlement*
**Most Likely Food Security Outcomes for the BSWLC Livelihood Zone**

**June to September:** On average, poor households will deplete own-produced food stocks earlier than normal and begin to face food gaps as early as July. Their consumption patterns will therefore likely deteriorate from two meals a day to one meal a day and will be comprised of small portions of maize meal and limited dried vegetables. Thus, food consumption coping strategies are expected to increase during this scenario period. Poor households will likely not have adequate income to afford basic non-food expenditures and protect their livelihoods during the scenario period June to September because they will be facing huge food gaps which will require them to cope by suspending these expenditures as well as deplete assets through sales to cover the food gaps. Crisis (IPC Phase 3) food security outcomes are expected.

**October to January:** Poor households’ food consumption patterns will likely worsen during the October to January period as the lean season sets in. Access to food purchases will be limited due to poor livelihoods and incomes. On-farm casual labor opportunities are expected to remain constrained due to cash shortages and an anticipated below-average 2018/19 rainfall season. Incomes from livestock sales will most likely be below average. Thus, consumption patterns are likely to include poor dietary diversity and a reduced number of meals. Livelihood activities will likely continue to be strained as the scenario period progresses. Crisis coping will likely evolve during the October to January period due to the increased food gaps and increased needs to fill up the food gaps. Activities such as wild foods and firewood sales are expected to increase household incomes slightly. Temporary labor migration is also expected to increase as the next agricultural season begins, affecting household labor for own-production.

**EVENTS THAT MIGHT CHANGE THE OUTLOOK**

**Table 3.** Monthly Acute IPC Phase Classification for Matobo District, June 2018 to January 2019.

<table>
<thead>
<tr>
<th>Area</th>
<th>Event</th>
<th>Impact on food security outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td>National</td>
<td>Improved liquidity situation and cash availability on formal markets</td>
<td>Will likely reduce or stabilize prices and cushion against potential price spikes for food and non-food commodities and services</td>
</tr>
<tr>
<td></td>
<td>Normal to above-normal 2018-19 rainfall season</td>
<td>Will improve on-farm labor opportunities and poor households’ access to food</td>
</tr>
<tr>
<td>Grain-deficit production areas</td>
<td>Lifting of the government import ban</td>
<td>This will increase supplies on local markets and thereby further stabilize prices</td>
</tr>
</tbody>
</table>

**ABOUT SCENARIO DEVELOPMENT**

To project food security outcomes, FEWS NET develops a set of assumptions about likely events, their effects, and the probable responses of various actors. FEWS NET analyzes these assumptions in the context of current conditions and local livelihoods to arrive at a most likely scenario for the coming eight months. Learn more here.