ZIMBABWE Food Security Outlook Update — April 2016

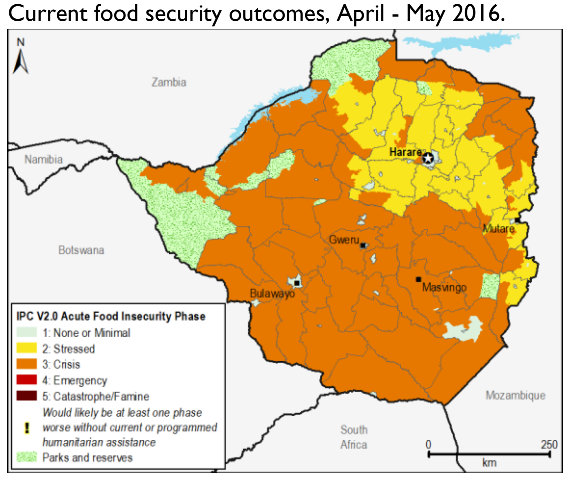
Limited household incomes and poor liquidity to increase number of food insecure households

KEY MESSAGES

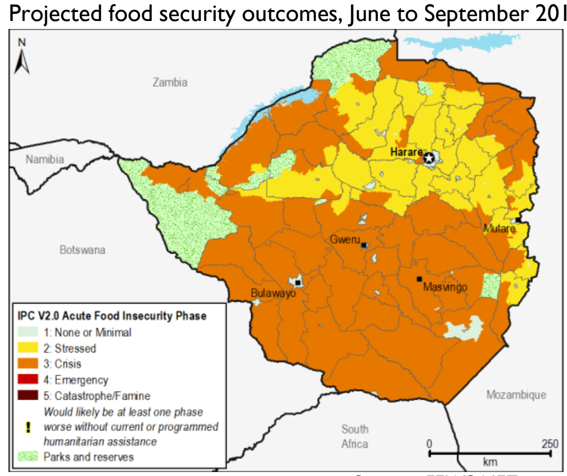
- All southern provinces will continue to experience Crisis (IPC Phase 3) food security outcomes from April through September due to no or very little own production, limited livelihood options, and constrained access to food because of high cereal purchase prices. The northern areas will be predominantly Stressed (IPC Phase 2) during this period as most poor households are likely to produce below average maize and will experience some challenges in accessing food later in the consumption year.

- National cereal production from the 2015-16 cropping season is expected to be less than half the five and ten year averages. The national cereal deficit for the current 2016-17 consumption year is estimated up to 1.3 million MT, which is much higher than usual. Since surplus regional cereal supplies will be substantially lower this year, imports from international markets are expected to occur but have not yet started.

Current food security outcomes, April - May 2016.



Projected food security outcomes, June to September 2016.



Source: *FEWS NET*

This map represents *acute* food insecurity outcomes relevant for emergency decision-making. It does not necessarily reflect *chronic* food insecurity. Visit www.fews.net/IPC for more on this scale.

CURRENT SITUATION

- Harvesting has started in northern and central areas of Zimbabwe, though some farmers are waiting for crops to completely dry in the fields. Crops planted much later in the season will still need another few weeks before they reach maturity.

- As previously stated, below normal rains and drought conditions from October 2015 to February 2016 adversely affected food crop and livestock conditions across all parts of the country, especially in the south.

- In March and early April, much of the country experienced widespread rainfall. In the south, where most crops have been completely written-off, the recent rainfall improved water availability and pasture conditions in critically drought-hit areas. In most northern areas, some severely stressed crops have recovered as a result of the rains. Nonetheless, below-average production is still anticipated in the north even with the recent rainfall.

- The tobacco selling season officially opened on the 31st of March. A 20 percent reduction in production is expected compared to last year's crop due to poor cropping conditions and reduced area planted this season. This decrease is expected to reduce community and household incomes. Production of other cash crops like cotton are not significant this season due to very low planted area.

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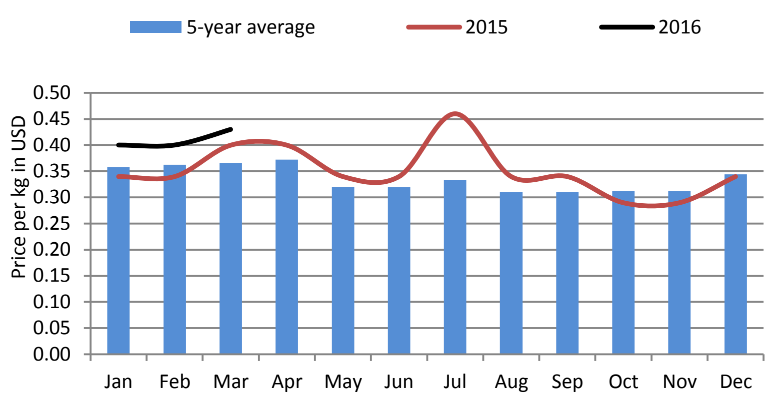
- Livelihood options continue to be constrained for the majority of poor households across the country, especially in the south. Casual labor and self-employment opportunities are not readily available and remittance levels continue to be low. Most poor households are relying on market purchases to access cereal for consumption, with poor households in some districts reportedly receiving lean season assistance that was extended to April.

- Across the country, green consumption is currently lower than usual, even in the traditionally surplus-producing Mashonaland provinces. In places where green harvests are available, it is serving as an important source of main or supplementary food.

- For the previous 2015-16 consumption year, the national cereal deficit of 645,000 MT was mostly filled with formal imports of maize between April 2015 and March 2016, of which nearly all came from Zambia. Formal imports have decreased significantly following temporary export restrictions in Zambia. Between February and March, imports decreased by 36 percent. National carry-over cereal stocks from the 2016 harvest are expected to be atypically low in comparison with last year and the five year average.

Figure 1. Harare, Zimbabwe maize grain prices.



- The government has started issuing out maize meal import permits to private traders in order to help fill the expected cereal gap this marketing year. The GMB is now selling maize to registered beneficiaries at the reduced price of $15/50 kg bag ($0.30/kg), which is down from the earlier price of $22.25/50 kg bag ($0.45/kg), following a government directive in January.

- Average maize grain prices increased by about 4 percent between February and March in FEWS NET sentinel markets. In March average maize grain prices were still 31 percent above the same time last year and 29 percent above the five year average (Figure 1). In contrast, maize meal prices are generally stable and lower than the same time last year and the four year average.

UPDATED ASSUMPTIONS

The assumptions used to develop the most likely scenario for the February to September 2016 Outlook period are still valid. A full discussion of the scenario is available in the Zimbabwe February to September 2016 Food Security Outlook.

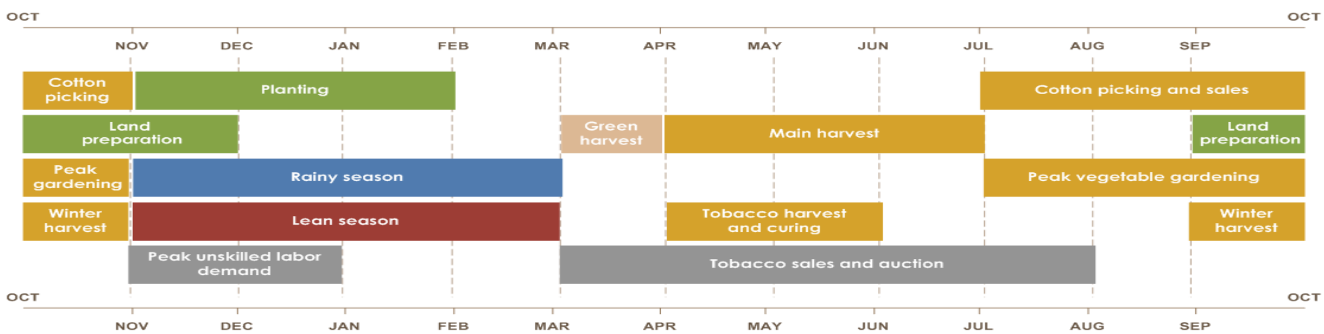
PROJECTED OUTLOOK THROUGH SEPTEMBER 2016

Across most of the country, maize grain prices peaked in March and are expected to remain high from April through September. Some of the factors that will continuing driving these high grain prices include high demand, low local availability, and costly international cereal imports. In the northern areas, only marginal and short-lived price reductions in May and June are expected. In the south, maize grain is expected to continue being unavailable in most markets from April through September.

In most of the country, livelihood options and labor rates are expected to continue to be low. Livestock prices will also continue to be low, especially in the south, due to the earlier drought and the end of the seasonal rains. Livestock to cereal terms of trade will be unfavorable to livestock-disposing households. Remittance levels and amounts are expected to be below average due mainly to the depreciation of the South African Rand. Limited household incomes and poor liquidity will likely increase the number of food insecure households earlier than usual in the 2016-17 consumption year and on into the next peak of the lean season.

Most districts in the south and marginal production areas in the north will maintain Crisis (IPC Phase 3) food security outcomes. Coping strategies used by most households in these areas include distress livestock and asset sales and labor migration. Most parts of the Mashonaland Provinces that typically face Minimal (IPC Phase 1) food insecurity during the harvest and post-harvest period, are expected to experience Stressed (IPC Phase 2) outcomes from April to September due to reduced harvests and the absence of carryover stocks. Coping strategies for poor households in these areas includes labor migration, gold panning, and petty trading.

SEASONAL CALENDAR FOR A TYPICAL YEAR



ABOUT THIS UPDATE

This monthly report covers current conditions as well as changes to the projected outlook for food insecurity in this country. It updates FEWS NET's Food Security Outlook, which is published three times per year. Learn more about our work here.