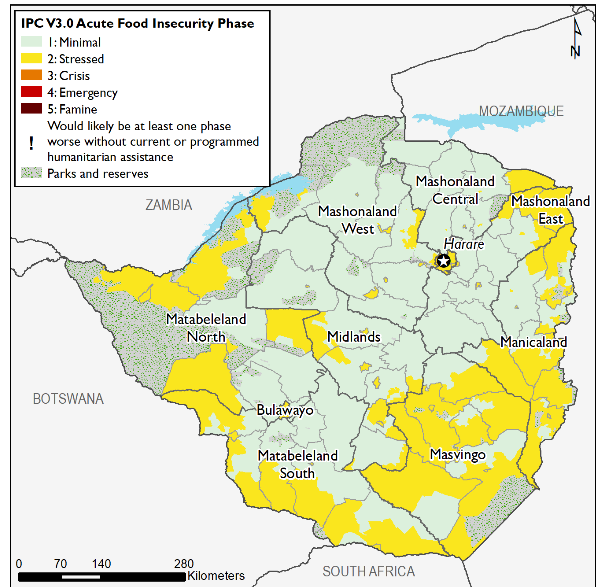


*Household food access in some deficit areas declines as own-produced food stocks become exhausted*

**KEY MESSAGES**

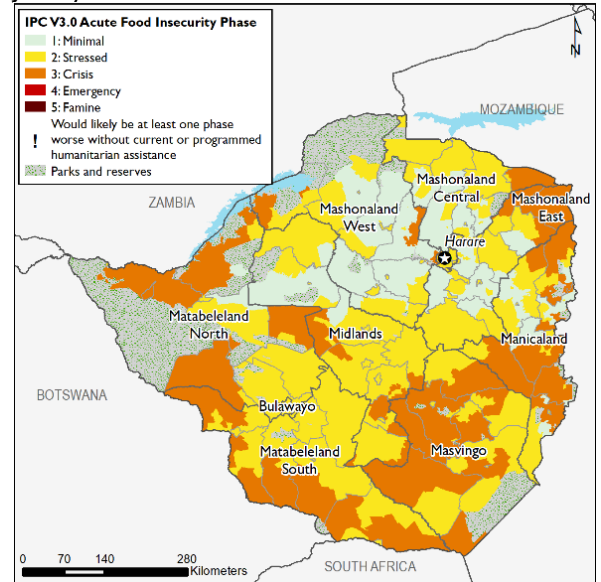
- In typical deficit-producing areas, households’ own-produced food stocks are depleting with some poor households having already exhausted their stocks. Stressed (IPC Phase 2) outcomes continue in these areas with Crisis (IPC Phase 3) expected to emerge in October as more households likely rely on markets for food. Minimal (IPC Phase 1) is expected across surplus-producing areas, though some areas will deteriorate to Stressed (IPC Phase 2) with the progression of the lean season. Most urban areas are anticipated to remain Stressed (IPC Phase 2) throughout the outlook period due to continued below-average purchasing power.
- The annual inflation rate continues to decline, down to 50 percent in August according to ZIMSTAT. Despite this, the cost of living continues to increase and is significantly above poor households’ income in urban and rural areas. The cost of food and the total cost of living increased by 3.1 and 3.7 percent, respectively, between July and August. Prices in ZWL for staple foods and most goods and services continue to increase mainly driven by increasing parallel market exchange rates.
- COVID-19 infections and associated deaths have declined since July; however, the government has maintained the Level 4 national lockdown through at least early September. These restrictions, combined with land border closures and transportation challenges are negatively impacting income-generating activities and food access, particularly among poor households in urban areas.
- Despite last season's above-average rainfall, consecutive years of drought are contributing to issues in water availability and access in semi-arid areas in the south, west, and extreme north, negatively affecting domestic and livelihood uses. Pasture and livestock conditions, especially cattle, are also deteriorating due to compounding effects of previous droughts, including poor regeneration of grasses.

Projected food security outcomes, August-September 2021



Source: FEWS NET

Projected food security outcomes, October 2021 to January 2022



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.

## CURRENT SITUATION

With the progression of the 2021-22 consumption season, households' own-produced food stocks are beginning to run low. Some poor households have already exhausted their stocks, especially in the south where production was negatively affected by above-average rainfall during the 2020/21 agricultural season. Households in most typical surplus-producing areas continue to have adequate stocks.

The government directive for all maize grain to be sold to the Grain Marketing Board (GMB) and contractors remains in effect and the GMB continues to receive significant quantities of maize, mainly from surplus-producing areas in the Mashonaland Provinces. By mid-August, the GMB had reportedly received over 730,000 MT of maize grain, more than 230,000 MT above the minimum mandatory Strategic Grain Reserves levels. Maize grain deliveries by mid-August were over six times those of the same period last year. Since all grain sales must be routed through the GMB and contractors, supply

of grain on open markets is low, particularly in deficit areas where demand is gradually increasing as household stocks deplete. Strict enforcement of the directive – including recent reports of authorities impounding grain and arresting private buyers in parts of the country – is further disincentivizing open market sales. Low maize grain supply in open markets is sustaining high prices and resulting in some households resorting to the purchase of maize meal earlier than anticipated.

Staple grain and maize meal prices in August remained largely stable in USD terms across most markets, although prices in ZWL terms increased, driven mainly by increases of up to 15 percent in parallel market exchange rates in August. Due to the aforementioned shortages in some deficit areas, maize grain prices in these areas are 50 to 75 percent higher than average prices in surplus-producing areas. Maize meal is generally available across most markets in the country. Informally and illegally imported and cheaper maize meal brands remain available mainly in southern areas bordering South Africa and Botswana.

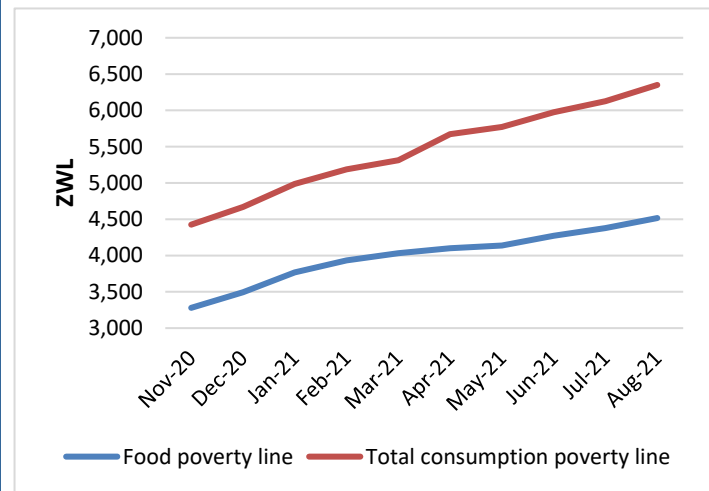
Macroeconomic challenges and constrained purchasing power continue to negatively affect livelihoods and food access, especially among poor urban and rural households. Although official annual inflation continues to decline, the cost of living remains high and continues to increase beyond what poor households can afford. ZIMSTAT reported annual inflation at 50 percent in August, down from 56 percent in July and 107 percent in June. However, monthly inflation increased to 4.2 percent in August from 2.6 percent in July. Also according to ZIMSTAT, the cost of living increased by 3.1 percent and 3.7 percent from July to August, as measured by both the cost of minimum food requirements and the total cost of food and non-food needs to stay above the poverty line, respectively (Figure 1).

Despite the government directive for goods and services charged in ZWL to be pegged at prevailing official auction rates, most businesses are applying parallel market exchange rates, driving high and increasing prices in ZWL terms. With the official exchange rate around 85 ZWL/USD, parallel market rates are over 50 percent higher. In addition, up to 30 percent fees are imposed on non-cash ZWL mobile money and electronic transfers. High fuel and transportation costs and on-going transportation challenges due to COVID-19-related movement restrictions continue to negatively impact livelihoods in both rural and urban areas.

Direct and indirect impacts of COVID-19-related restrictions continue in both rural and urban areas. In August, both infections and associated deaths declined significantly compared to the peak of the third wave in mid-July. The government has maintained the Level 4 national lockdown through at least early September with bans on intercity passenger transportation services, reductions in business hours and personnel levels at workplaces, and continued nightly curfews and land border closures. Schools, however, are now set to reopen at the end of the month. Poor households reliant on informal sector activities, including cross border trade, petty trade, remittances, small scale industries, and informal transport services, are experiencing the biggest resulting declines in income and access to food.

In spite of favorable 2020/21 rainfall, water availability and access are fast deteriorating in the drier parts of the country including the Matebeleland Provinces, Masvingo, parts of Midlands and Manicaland Provinces and the extreme northern parts of the country. This rainfall was insufficient to adequately replenish ground water reserves after consecutive years of drought.

**Figure 1.** Average national food and total consumption poverty lines per person per month, November 2020 to August 2021



Source: ZIMSTAT

Some reservoir capacities have also progressively decreased mainly due to siltation, a process by which eroded soil enters into bodies of water and negatively impacts their capacities to hold and store water. This has resulted in some water challenges for domestic and livelihood uses including vegetable production and sales, brick making, and construction, among others. Pastures are also deteriorating in these areas from fair to poor conditions, which is leading to declines in livestock conditions. Livestock diseases remain of high concern nationally, exacerbated by high and unaffordable prices of veterinary drugs on the market. Fair to poor livestock conditions is expected to hurt incomes for households reliant on livestock as part of their livelihood.

Currently, Minimal (IPC Phase 1) outcomes prevail in surplus-producing areas while mainly Stressed (IPC Phase 2) outcomes are being experienced in most deficit-producing areas and urban areas.

### UPDATED ASSUMPTIONS

Most of the assumptions used to develop FEWS NET's most likely scenario for the [Zimbabwe Food Security Outlook for June 2021 to January 2022](#) remain unchanged except for the following:

- Staple grain supplies on open markets in deficit areas are now expected to be at average to below-average levels due to strict restrictions on non-GMB grain sales and on movement. Earlier than expected maize meal purchases for households in these areas are anticipated as a result.
- Water availability and access challenges in the drier parts of the country are likely to be significant and even approach levels experienced in the recent past in some areas.

### PROJECTED OUTLOOK THROUGH JANUARY 2022

In surplus-producing areas, Minimal (IPC Phase 1) outcomes are expected to prevail throughout the outlook period. However, areas where crop production was impacted by heavy rains will experience Stressed (IPC Phase 2) outcomes beginning in October with the onset of the lean season.

Most deficit areas are expected to experience Stressed (IPC Phase 2) outcomes through September. Crisis (IPC Phase 3) outcomes are expected to emerge in these deficit areas starting in October as households' own-produced stocks decline and they are forced to purchase on the open market with reduced purchasing power from poor incomes.

Urban areas are expected to remain Stressed (IPC Phase 2) throughout the outlook period due to low income among poor households and above-average prices.

#### 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.](#)