

FAO/FEWSNET/WFP

Food Security and Livelihoods Cluster Update

February 25, 2022

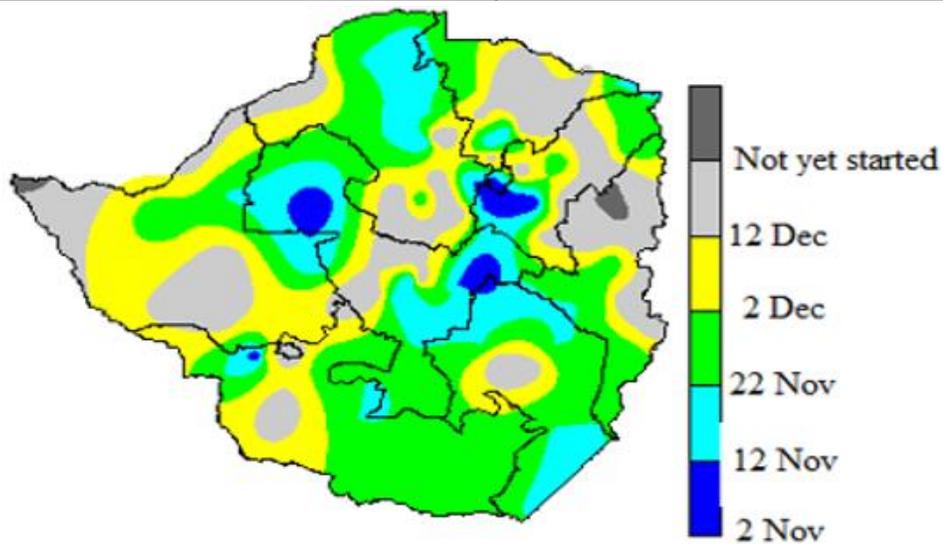
Key Highlights

- *General observations: 2021-22 rainfall and agricultural season*
- *Market conditions*
- *Macro-economic situation*
- *Food consumption situation*
- *Projected food security outcomes*

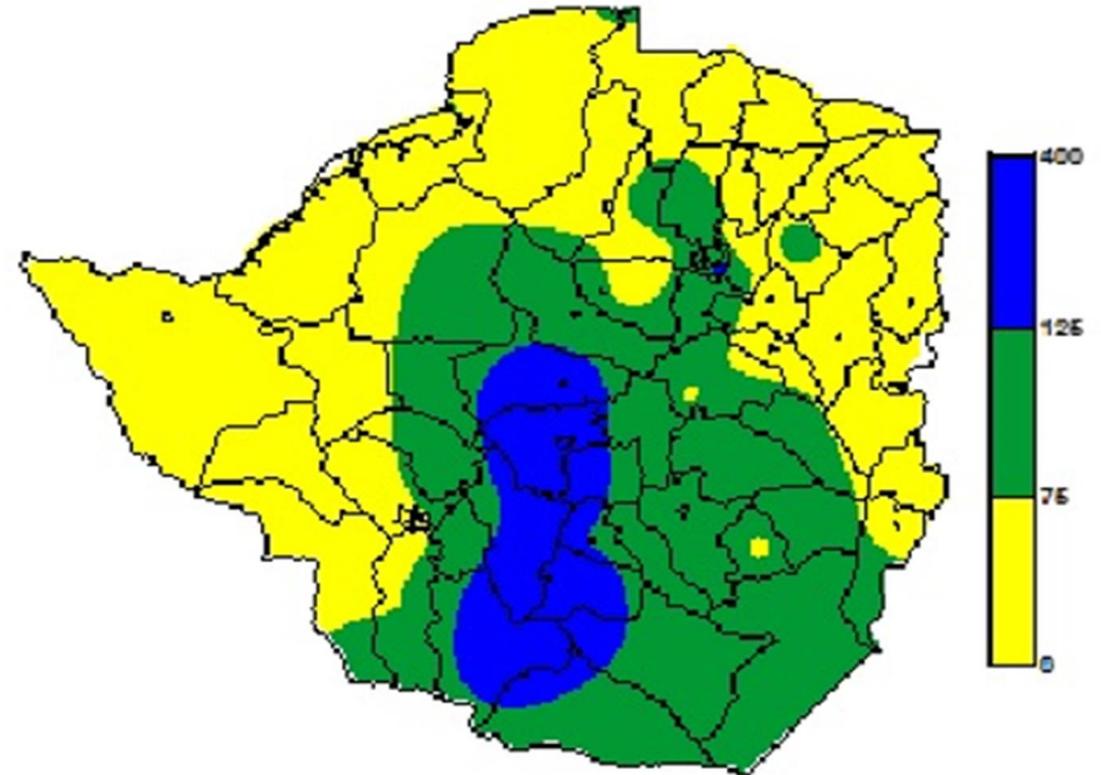
2021-22 rainfall season: performance in October - December

The start of the season varied by geographical location spanning from October to early January:

Geographical Location	Start of Season
Mashonaland East and Midlands Provinces	2-12 November 2021
Harare, Bulawayo, Mash West & Central Provinces	November into December 2021
Matabeleland North & South, Masvingo, part of Manicaland and extreme North of Mash West & South	2 nd dekad of December 2021
Other parts of Manicaland	Early January 2022

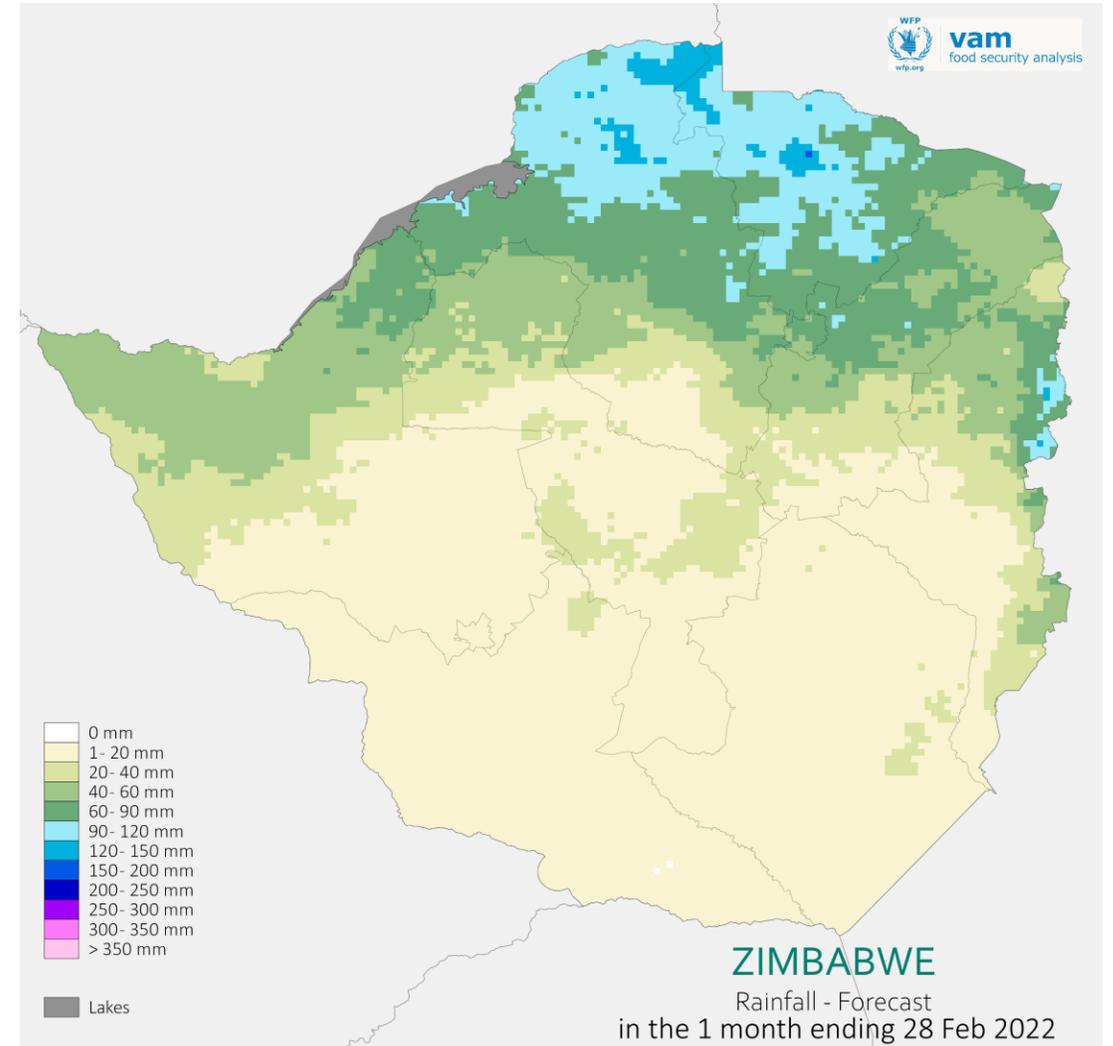
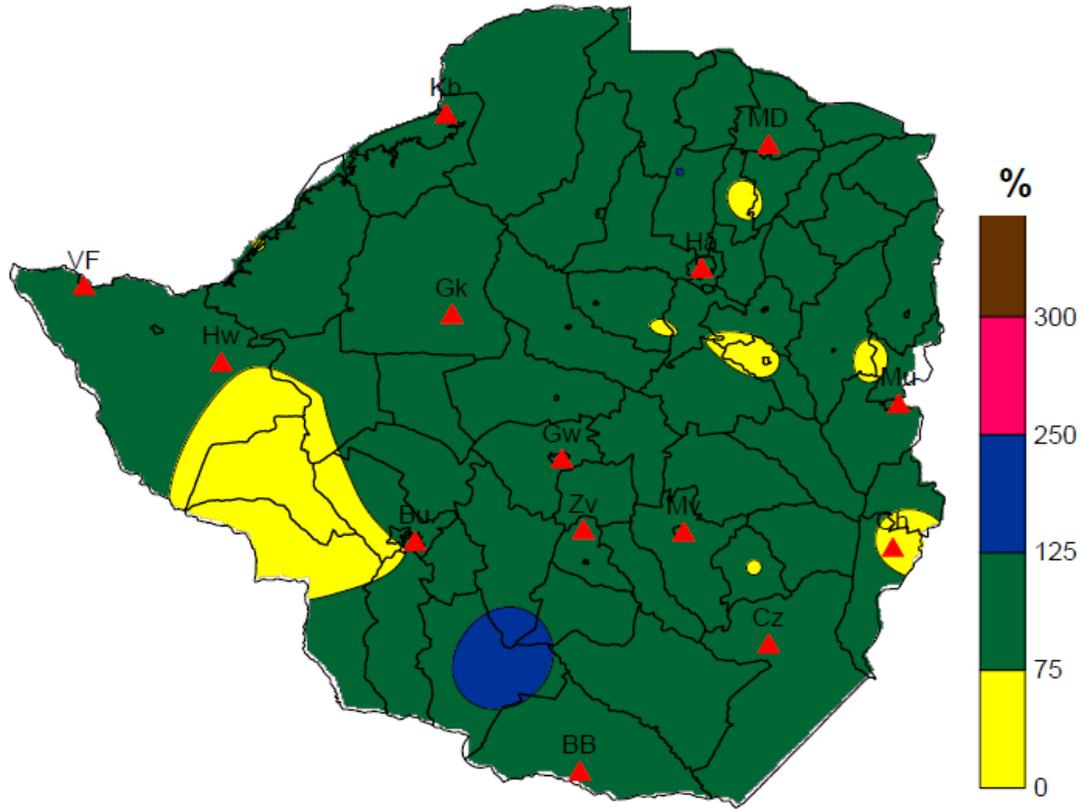


October-November-December (OND) Seasonal Rainfall Performance

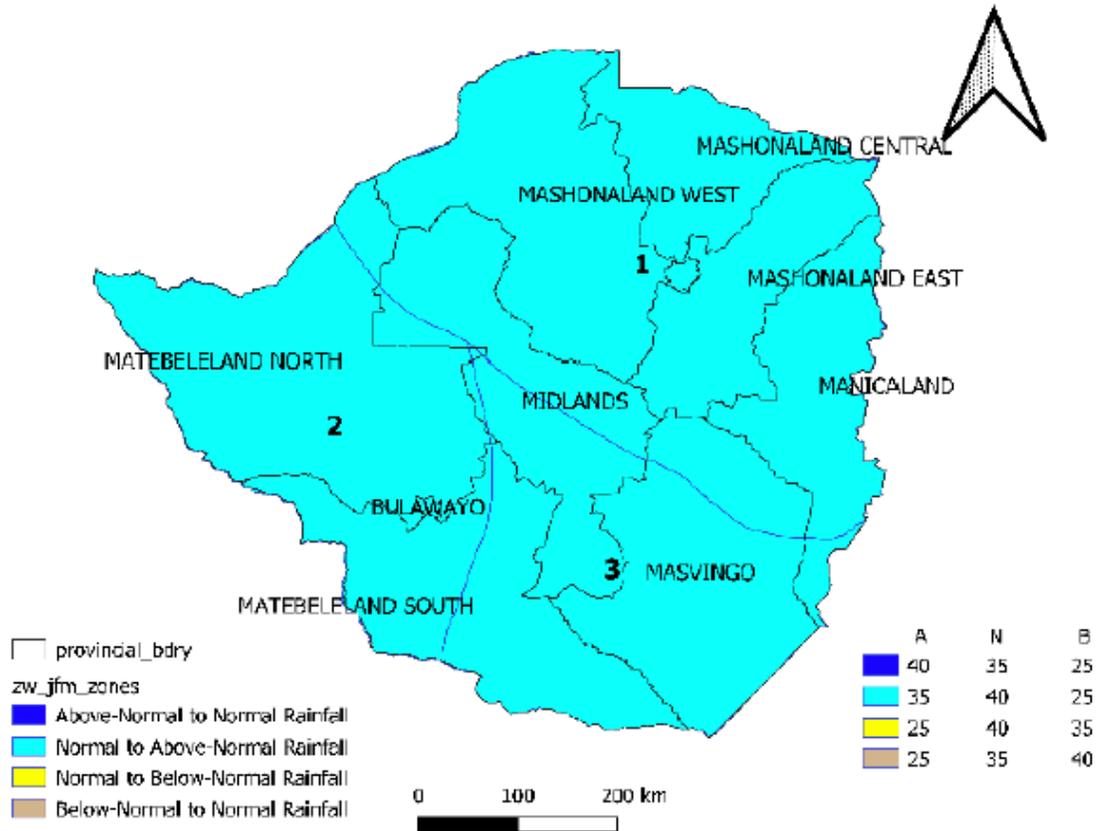


2021-22 rainfall season: current situation

Percentage of normal rainfall received this season
(1 October 2021 to 22 February 2022)



2021-22 rainfall season: updated outlook for February - April



Rainfall outlook for the October to December (FMA) 2022 period

Region I: Harare Metropolitan, much of Mashonaland East, Mashonaland West, Mashonaland Central, north-eastern parts of Midlands, most of Manicaland.

Increased chances of normal-to-above normal rainfall

Region II: The greater part of Matabeleland North, parts of Bulawayo Metropolitan, parts of Midlands and parts of Mashonaland West.

Increased chances of normal-to-above normal rainfall

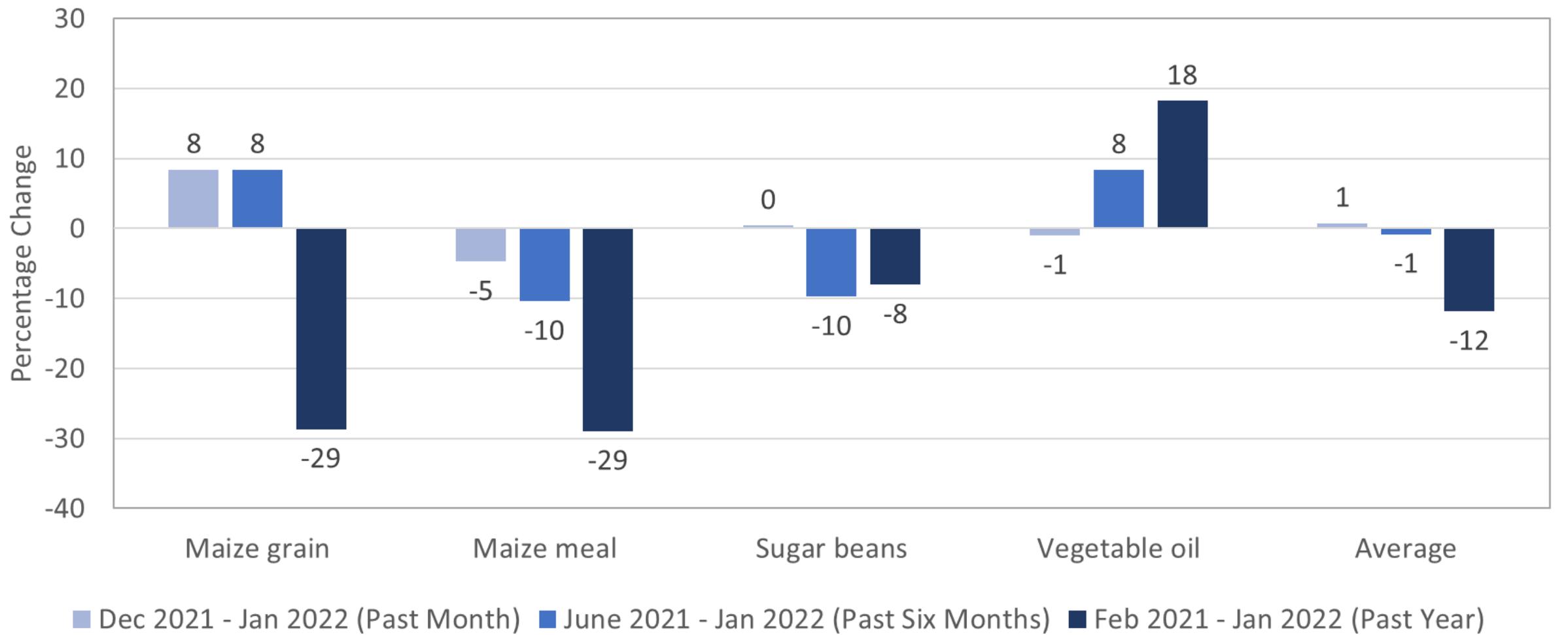
Region III: Masvingo, the bulk of Midlands, the bulk of Bulawayo Metropolitan, the extreme southern parts of Manicaland and the bulk of Matabeleland South.

Increased chances of normal-to-above normal rainfall

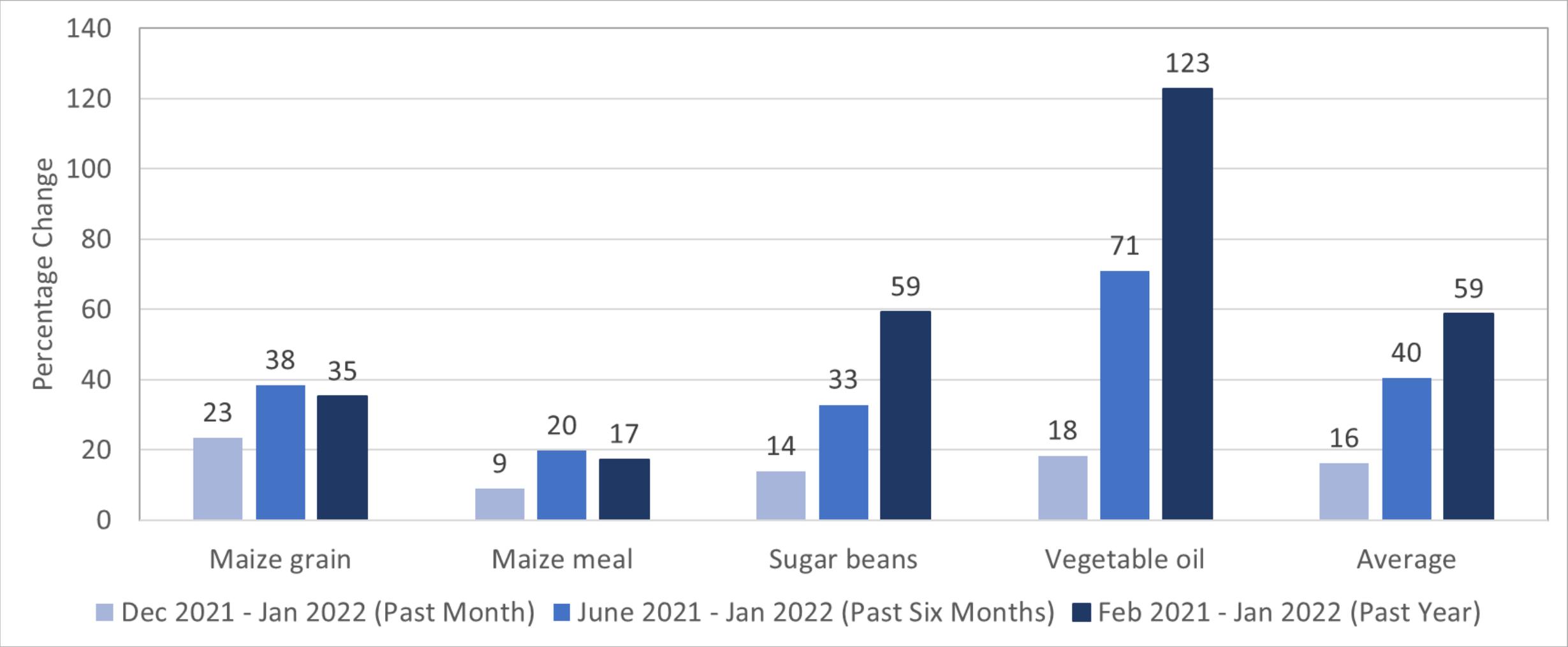
Market conditions: availability & price of basic food basket commodities

- Maize grain availability remained low, only available in 6% of all the monitored rural and urban markets in January. Maize meal was available in 81% of urban markets, while in rural areas availability decreased from 58% in December to 50% in January.
- The supply of other food commodities (sugar beans, vegetable oil, rice, salt, sugar and kapenta) remained generally stable being available in at least 60% of the rural markets and at least 80% of urban markets.
- In USD terms, in January the average price of maize grain was 8% higher than the previous month; while the average price of maize meal, sugar beans and vegetable oil remained stable. However, compared to one year ago, the average reported price of maize grain and meal decreased by 29% and for sugar beans decreased by 8%, while the price of cooking oil increased by 18% (slide 6).
- In local currency (ZWL) terms, there was a general price increase for all the food commodities during January compared to the previous month by an average of 16%; when compared to the same time last year (January 2021), prices have increased by an average of 59%. The price of cooking oil has seen the biggest increase (slide 7).

Market conditions: basic food basket commodity price trends in USD terms



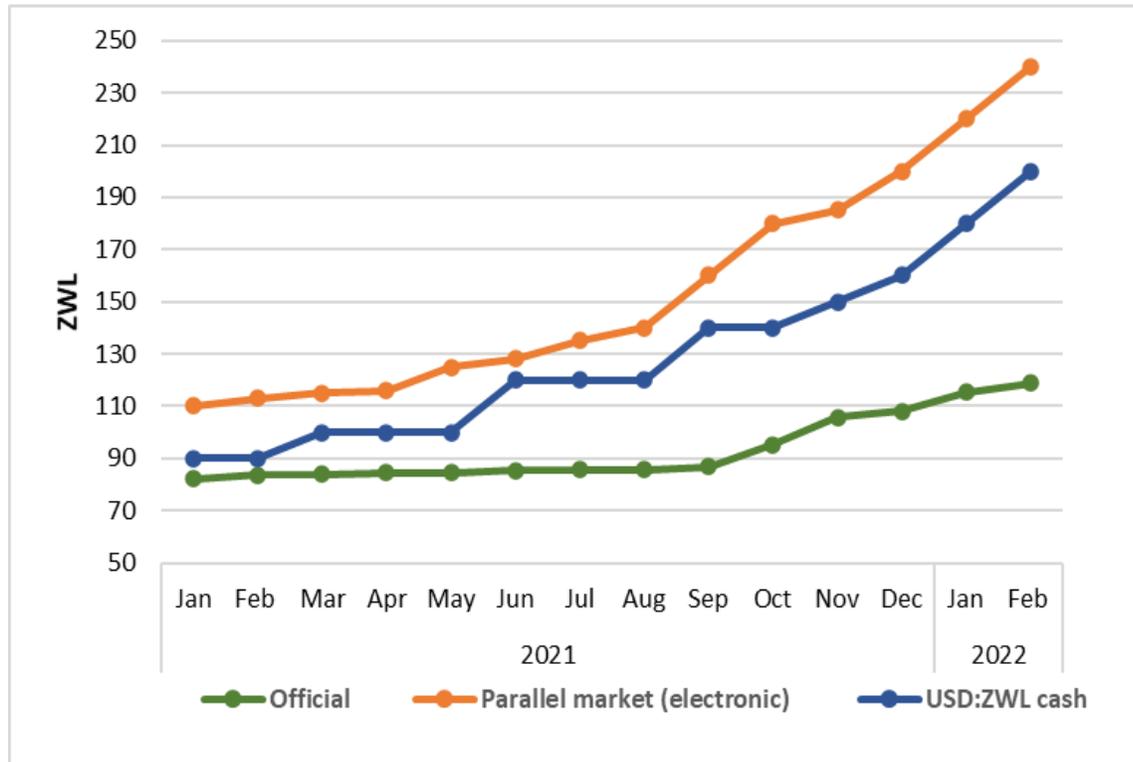
Market conditions: basic food basket commodity price trends in ZWL terms



Cereal market conditions and outlook

- Government has lifted the maize and wheat import ban with immediate effect; milling industry allowed to import 45,000 MT and stockfeed industry 30,000 MT of maize per month
- No pronouncements yet on the 2022-23 maize grain purchase conditions with respect to the GMB; this is critical as it will have bearing on grain availability on open markets
- Grain prices expected to peak in March; seasonal USD price reductions from April/May (harvest) are expected to be marginal in most areas due to anticipated poor harvests
- The 2022-23 grain producer prices (ZWL) announced in December 2021 are likely to have been significantly eroded by inflation/local currency devaluation by the time of harvest, which may impact deliveries to the GMB
- Household own-produced food stocks are anticipated to deplete earlier than normal (e.g., June-Aug) in most areas, including typical surplus-producing areas; anticipated earlier than normal start of market purchases and start of the 2022-23 lean season

Macro-Economic Situation: Exchange Rates



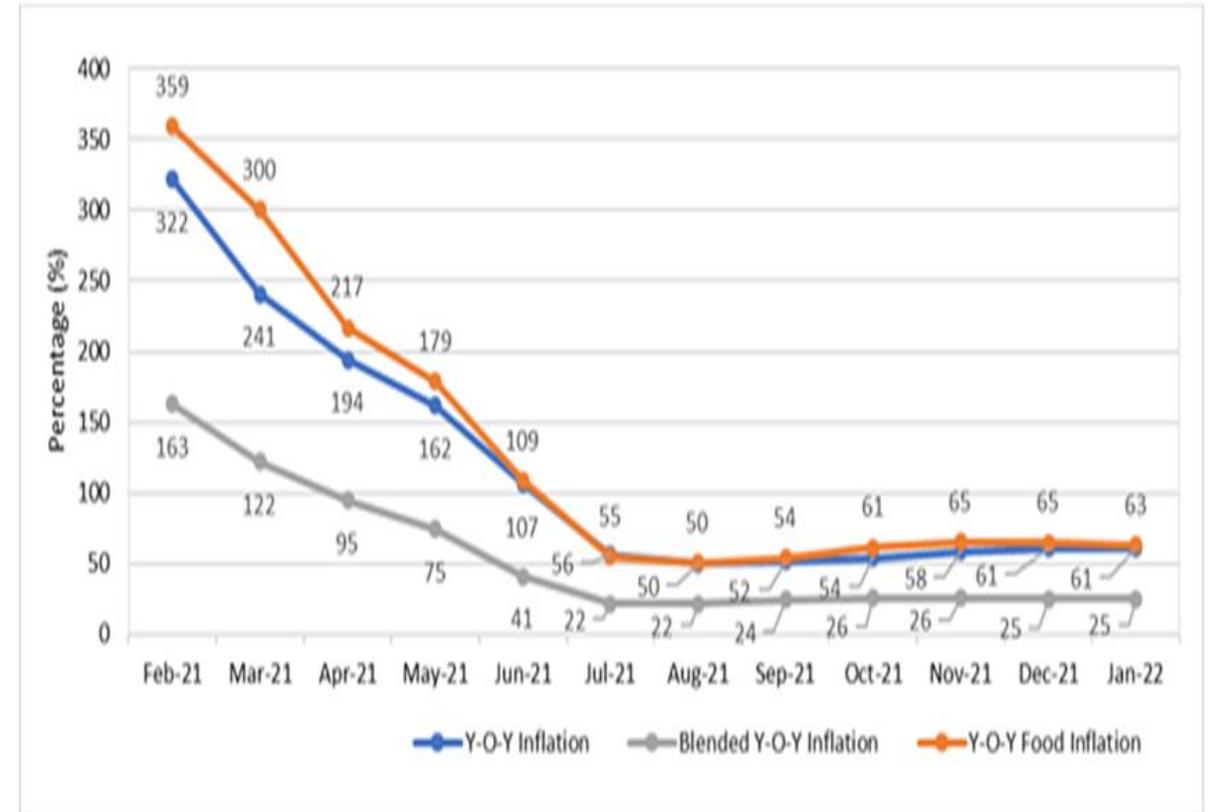
- The gap between the official and parallel market exchange rate continue to increase with the gap standing at approximately 108% compared to 25% during the same time a year ago.

- The official exchange rate for the ZWL has been on a steady increase since September 2021 and traded at ZWL124.02 during the third week of February 2022 against the US\$ compared to ZWL108.66 in December 2021.

- The rate of increase for the parallel market was 10.7% between January and February 2022 compared to 9.3% between December 2021 and January 2022 (Zimrates.com).

Macro-Economic Situation: Inflation

- The month-on-month inflation has been on a gradual decline since October 2020 with January receding to 5.34% from approximately 6% during the preceding month.
- On the other hand, annual headline inflation in ZWL terms for January 2022 remained stagnant at 61%.
- Blended inflation, which entails the blending of the inflation for prices that are quoted in US\$ and inflation for prices quoted in ZWL, on year-on-year basis stood at 25% in January 2022 which was a 138 percentage points drop for the 12 months period from February 2021.



Source: Reserve Bank of Zimbabwe

Livelihoods update and forecast

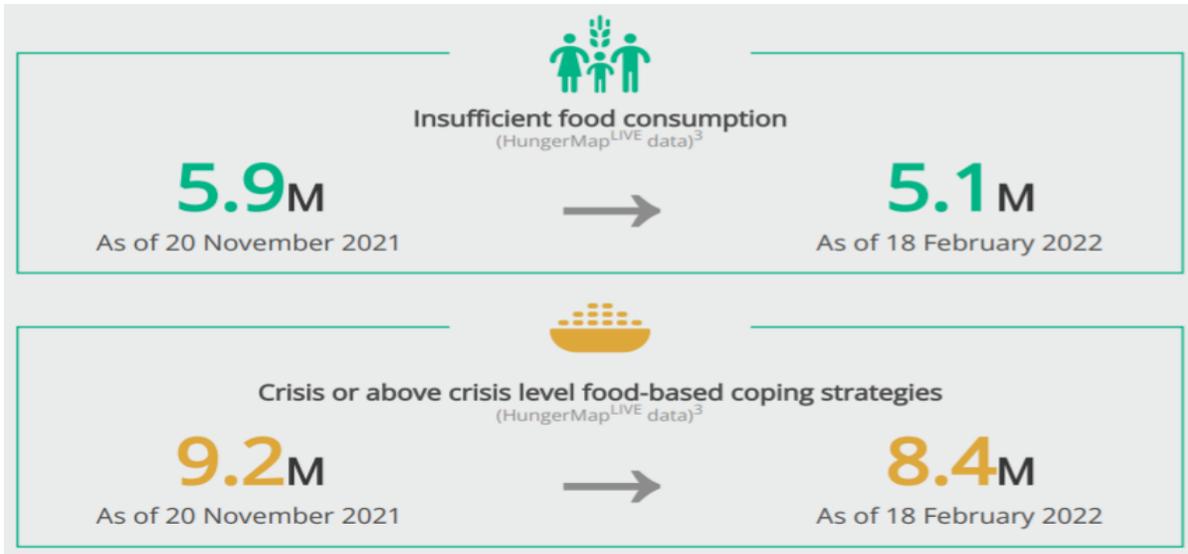
- Most typical livelihood options expected to continue at below normal levels through much of the year (e.g., casual labour, crop sales, livestock sales, self-employment)
- Below normal water availability and access expected especially in most typical semi-arid areas through November, negatively impacting livelihoods (e.g., livestock conditions and sales, vegetable production and sales, brick molding and construction)
- Reopening of land borders expected to improve related livelihoods (e.g., cross border trade, informal transport and courier services, remittances etc especially in the southern regions)
- Petty trade, informal mining, expected to continue increasing as coping strategies
- Macro-economic challenges expected to continue negatively impacting household incomes, disposable incomes and access to markets
- Humanitarian assistance anticipated in most typical deficit-producing areas and other areas during the 2022-23 consumption year

General Livestock condition

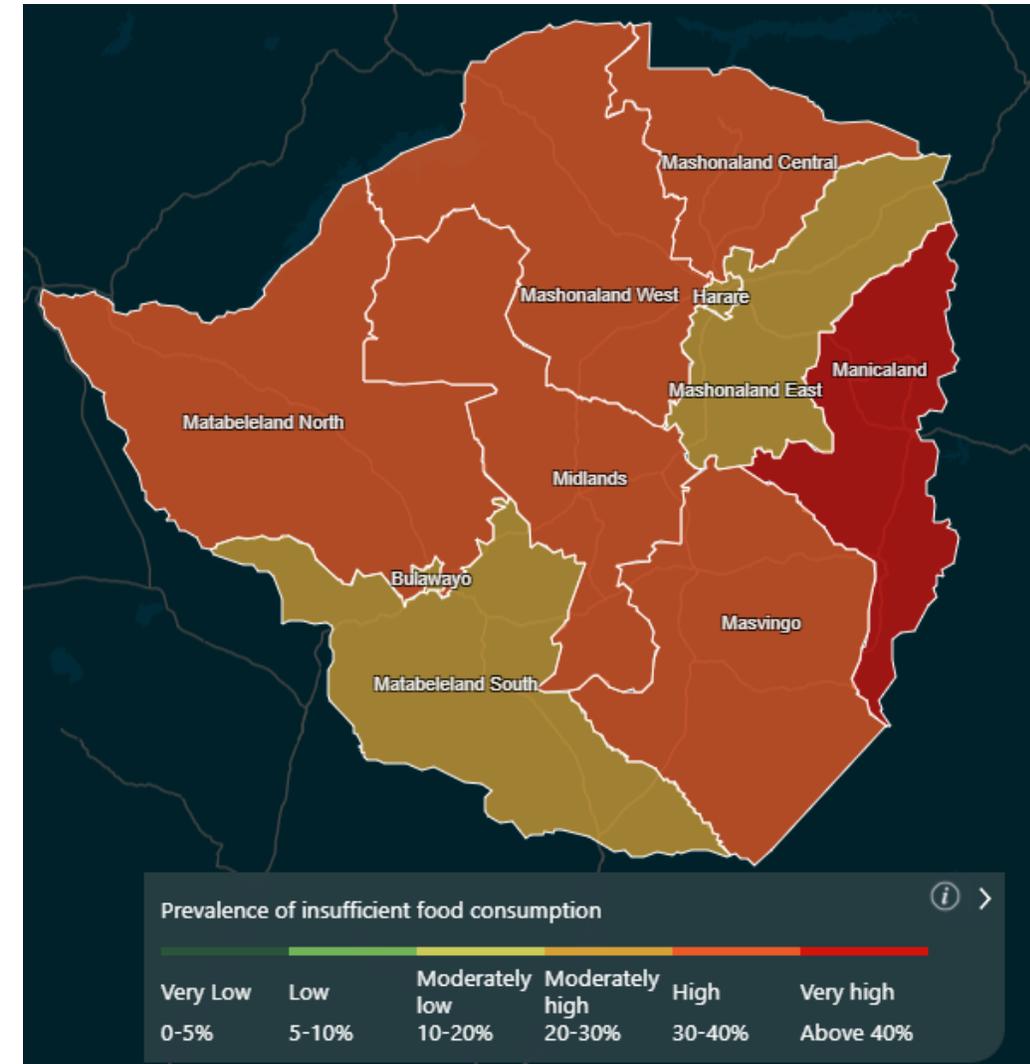
- There is generally adequate grazing for livestock in most areas of the country due to the rains that have been received which have promoted regrowth of grasses and legumes therefore improving the availability of feed resources.
- Planted forage crops are currently in good condition as a result of the rains received in the past weeks.
- Disease outbreaks - There has been an increase in the number of Tick-Borne Diseases (TBD) cases and TBD related deaths mostly from Theileriosis (January Disease), Anaplasmosis and Heart water recorded in Buhera, Gutu and Bikita districts due to high tick infestations this is as a result of
 - (1) Inaccessibility of some of the dipping tanks due to heavy rains.
 - (2) Limited access to water for dipping affecting the frequency of dipping in some areas.
 - (3) Some farmers generally not bringing their cattle for dipping.

Food Consumption and Coping Situation

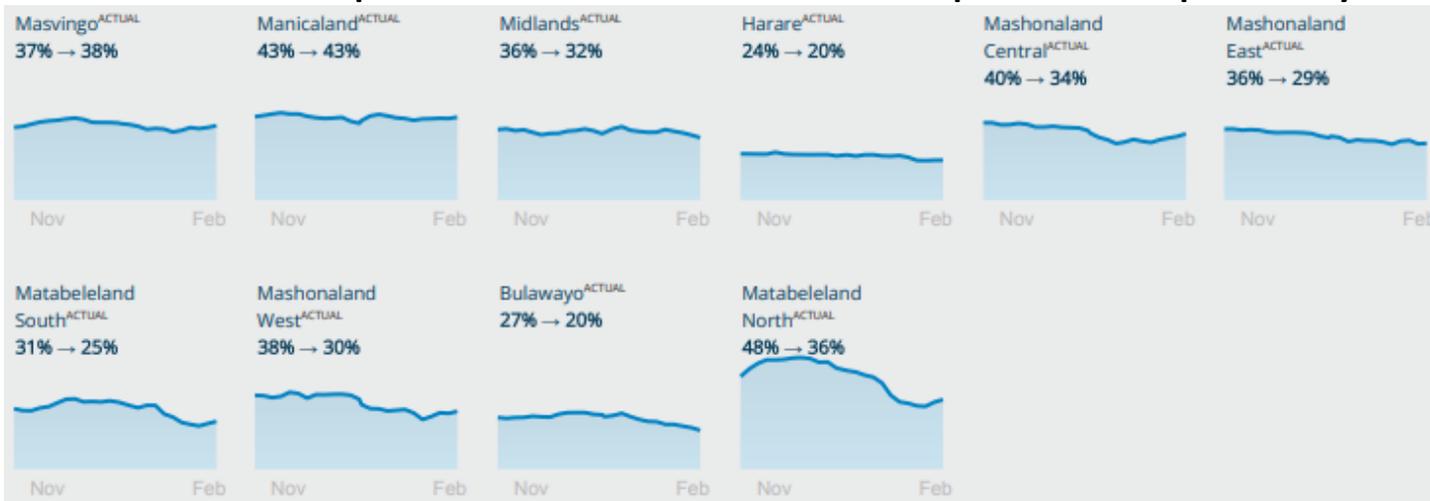
National estimation of insufficient food consumption and coping over the past 90 days



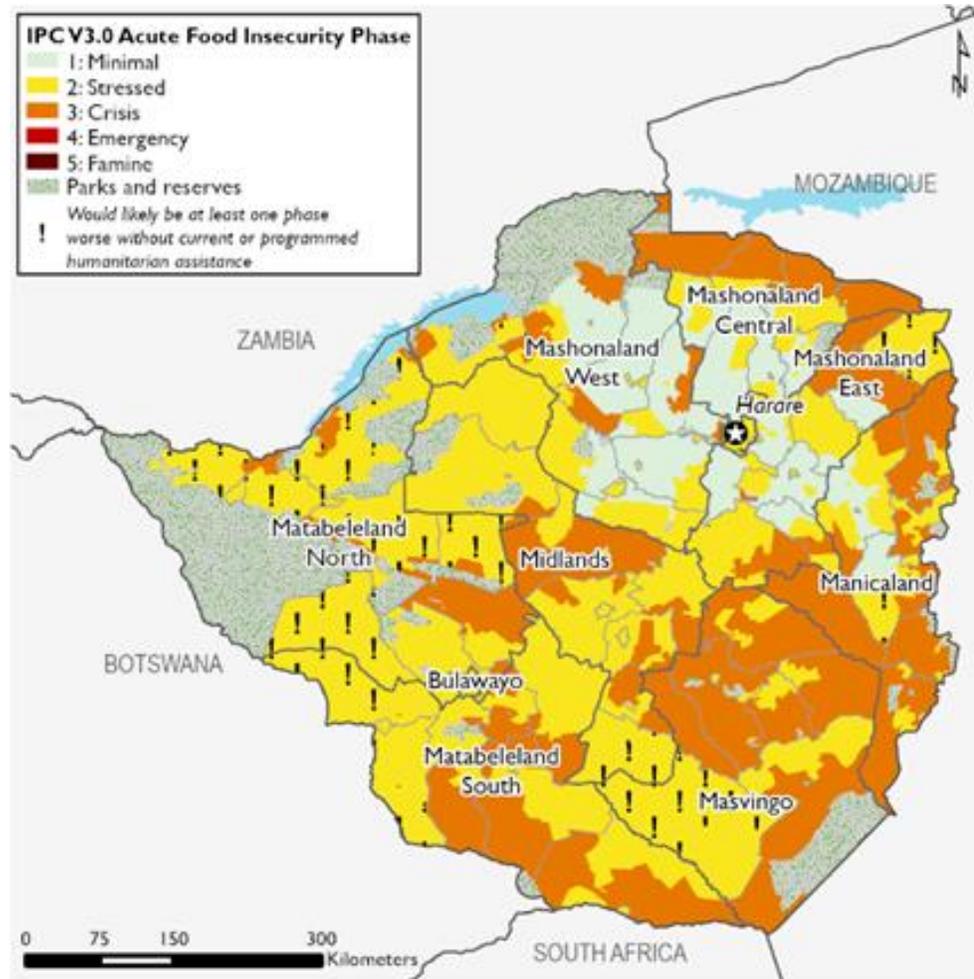
Current estimated prevalence of insufficient food consumption



Province trends of the prevalence of insufficient food consumption over the past 90 days



Projected food security outcomes February to May 2022



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