Key Highlights

• Market condition – Availability & Prices
• Macro-economic Situation
• Livelihoods update
• Food consumption & Coping
• Food security outcomes
Precipitation Forecast: April
Seasonal Update

• Rainfall received in March and April came too late to have a positive impact on crops (mainly cereals) in most parts of the country.
• In some parts of the country the rainfall destroyed some to-be-harvested or already harvested crops.
• Consumption of green crops such as maize is ongoing in most areas, but at markedly below normal levels.
• Harvesting and drying of the early planted crops have started across the country.
• Some households are being forced to prematurely harvest and dry their crops, especially maize due to no household cereal stocks, poor access to cereal on the markets, and the March-terminated humanitarian assistance.
• The incoming harvest is expected to improve dietary diversity and household consumption in some typical surplus-producing areas. Not so in most eastern, southern, and western areas which experienced high rates of total crop write-offs, especially for cereals.
## Market conditions: AVAILABILITY

<table>
<thead>
<tr>
<th>Commodity</th>
<th>Rural Market</th>
<th>Urban Market</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maize Grain</td>
<td>4%</td>
<td>12%</td>
</tr>
<tr>
<td>Maize Meal</td>
<td>67%</td>
<td>76%</td>
</tr>
<tr>
<td>Sugar Beans</td>
<td>45%</td>
<td>83%</td>
</tr>
<tr>
<td>Veg. Oil</td>
<td>99%</td>
<td>99%</td>
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</tbody>
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Markets conditions - PRICES

• **Maize Grain** - prices remain high and above average despite the start of harvest. Maize is selling at 8 USD per 17.5 kg bucket in some deficit-producing areas, though farm gate prices are as low as 3 or 4 USD per bucket in some surplus-producing areas (esp. resettlement areas).

• Following the ZWL price increases in March, **maize meal** prices continued to increase in April by 175%. (Harare market)

• In mid-April, the Grain Millers Association of Zimbabwe increased maize meal and wheat flour prices by 52 and 31 percent respectively, citing increased prices of commercial maize by the GMB, and the rising cost of fuel and packaging, among other reasons. Maize meal and bread prices went up correspondingly by about 50 and 30 percent.

• The April ZWL %age price increases for **vegetable oil**, and **bread** are about 195% and 260%, respectively above the April 2021 prices. (Harare Market)

• On-going Ukraine conflict-related disruptions in global supply chains are expected to continue negatively impacting prices and supplies of fuel, grains (mainly wheat and maize), cooking oil, and fertilizers.
Market Conditions - PRICES

- ZERA announced a fuel price increase per litre effective 25th April as follows: Diesel - ZWL264.77 and Blend – ZWL252..40. This is an increase from ZWL215.19 for both commodities.

- In USD terms, ZERA increased the price of the commodities to USD1.71 and USD1.63 for diesel and blend, respectively.

- This is expected to push prices of other commodities further up.

Selected food price increases for Harare, April 2021 to April 2022
Market conditions: basic food basket commodity price trends in USD terms in Mar-April.

![Bar chart showing percentage change in commodity prices](chart)

- **Maize grain**: -20% (Feb-March 2022), -25% (Aug 2021 - Mar 2022), -11% (April 2021 - Mar 2022)
- **Maize meal**: -9% (Feb-March 2022), -12% (Aug 2021 - Mar 2022), -15% (April 2021 - Mar 2022)
- **Sugar beans**: -5% (Feb-March 2022), -3% (Aug 2021 - Mar 2022), -1% (April 2021 - Mar 2022)
- **Vegetable oil**: 17% (Feb-March 2022), 2% (Aug 2021 - Mar 2022), 1% (April 2021 - Mar 2022)
- **Average**: 4% (Feb-March 2022), 2% (Aug 2021 - Mar 2022), 1% (April 2021 - Mar 2022)
Market conditions: basic food basket commodity price trends in ZWL terms in Mar-Apr.

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<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>Maize grain</td>
<td>14%</td>
<td>51%</td>
<td>92%</td>
</tr>
<tr>
<td>Maize meal</td>
<td>11%</td>
<td>51%</td>
<td>66%</td>
</tr>
<tr>
<td>Sugar beans</td>
<td>1%</td>
<td>70%</td>
<td>43%</td>
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<tr>
<td>Vegetable oil</td>
<td>2%</td>
<td>60%</td>
<td>131%</td>
</tr>
<tr>
<td>Average</td>
<td>7%</td>
<td>62%</td>
<td>79%</td>
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</table>
Macro-economic situation – EXCHANGE RATES

- Continues to be volatile characterized by high inflation and spiking cost of living.
- Official forex exchange (auction) rate increased nearly 10% between the end of March and the end of April.
- Parallel market rates increased by about 40% during the same period, contributing to most price increases for goods and services.
- The April auction rate and April parallel market rates are almost 85% and 200% above the same period last year (April 2021), marking a significant devaluation of the local currency.
- A new 100 ZWL bill was introduced in early April, partly in response to the devaluing local unit.
- The continued weakening of the local currency against the USD is indicative of the erosion of the purchasing power of vulnerable households.

Spiking parallel market exchange rates, Jan 2021 to April 2022
The month-on-month inflation rate in April 2022 was 9.6% gaining 6.9 percentage points on the March 2022 rate of 2.7%.

Meanwhile, year-on-year headline and food inflation has been on an upward trajectory based on the ZWL; in March, headline inflation stood at 73% whilst food inflation stood at 75%.

On a regional scale, inflation rates for the month of February showed that Zimbabwe was the only country with headline inflation above 50% which is indicative of the compromised competitiveness of the country against its neighbours.

NB: The difference of headline inflation in comparison with neighbouring countries is indicative of domestic factors that are driving the inflation rather than imported inflation from the global space.
Livestock update

• General pasture conditions remains fair although some districts are are starting to experience depletion (maturity & die-back, moisture deficit)
• Pasture is still generally adequate for basic livestock nutrition
• However, farmers may need plan for feed supplementation in the next few months
Livelihoods update

- The GMB has started buying grain from the 2021/22 harvests using the new producer prices announced on the 26\textsuperscript{th} of April – Maize- ZW75,000/MT, small grains – ZW75,000, soya bean – ZWL171,495 and sunflowers – ZWL205,794.52
- No policy pronouncement yet by the government regarding the 2022/23 grain marketing season with respect to the GMB.
- The tobacco marketing season started at the end of March. Tobacco farmers will retain 75 percent of their foreign currency earnings, compared to 60 percent last season, a development that is expected to enhance household incomes in the face of inflation.
- The cotton marketing season is yet to begin, though the foreign currency retention levels will be 75% as well.
- Casual labour remain below normal levels – linked to performance of agric season
- Petty trade – increasing especially in urban settings
- Cross border trade – showing signs of recovery but remains lower than normal
- Looking ahead, Horticulture activities may increase where water is available at the end of the season. This may help to supplement food stocks at households.
Food Consumption and Coping Situation

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

- Insufficient food consumption: 4.7M (As of 17 January 2022) → 4.9M (As of 17 April 2022)

- Crisis or above crisis level food-based coping strategies: 8.8M (As of 17 January 2022) → 7.7M (As of 17 April 2022)

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

- Matabeleland South: 20% → 26%
- Mashonaland Central: 22% → 29%
- Mashonaland East: 27% → 31%
- Mashonaland West: 28% → 33%
- Bulawayo: 25% → 27%
- Matabeleland North: 39% → 43%

Source: WFP HungerMap LIVE - https://hungermap.wfp.org/