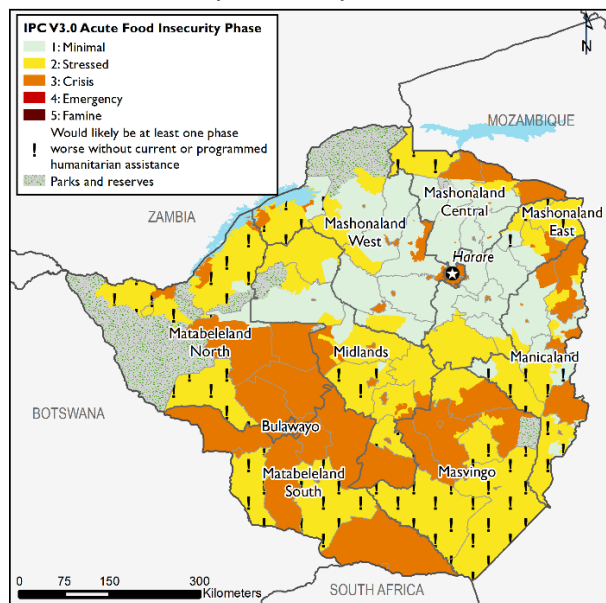


High levels of acute food insecurity and assistance needs are expected to persist into early 2021

KEY MESSAGES

- Although food security outcomes are better than previously anticipated in areas of the country, high humanitarian food assistance needs persist and are expected through at least early 2021. Despite the harvest, Crisis (IPC Phase 3) outcomes are expected across the southern, western, and extreme northern parts of the country throughout the outlook period due to below normal access to both food and income. Humanitarian assistance is currently improving outcomes to Stressed! (IPC Phase 2!) in some areas of the country.
- Outcomes in some typical surplus-producing areas in the north are better than previously anticipated, with Minimal (IPC Phase 1) present and expected from June to September. As livelihoods in these areas are mainly crop dependent, the somewhat favorable crop production and access to income, while below normal, is sufficient for poor households to meet their minimum food and some non-food needs. From October through January, Stressed (IPC Phase 2) outcomes are expected in surplus-producing areas as food stocks dwindle or are depleted and households are reliant on markets for food. Urban areas are currently in Crisis (IPC Phase 3) although Stressed (IPC Phase 2) outcomes are expected as the informal sector restarts following the lifting of COVID-19 restrictions and the economy slowly dollarizes.
- Economic volatility and depreciating parallel market exchange rates are progressively constraining livelihoods and disposable incomes. The official annual inflation rate in May stood at 786 percent and the local currency depreciated by over 80 percent between May and mid-June. In late June the government shifted from a fixed official foreign exchange system to a new auction system. However, volatile macroeconomic conditions are anticipated throughout the outlook period.
- COVID-19 related measures continue to constrain access to food and income for market dependent households even as government has progressively relaxed some restrictions. In mid-June, the informal sector re-opened on the condition operations register with local authorities and COVID-19 control measures are observed. National borders remain closed except for essential goods and services; inter-city and rural-urban transport services remain banned. The number of confirmed COVID-19 cases continue to increase driven mainly by returning citizens from South Africa and Botswana.
- The 2019/20 official maize production estimates are about 30 percent below average. In response to inflationary pressures, in April the government increased maize and small grains producer prices by about 80 percent, followed by a 30 percent incentive for deliveries through the end of July. Maize grain and maize meal imports mainly from South Africa continue although local supplies remain low. Shortages of some basic food items mainly maize grain, maize meal, sugar and cooking oil continue across most markets. Maize grain and maize meal prices are projected to remain significantly above average throughout the outlook period.

Current food security outcomes, June 2020



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.

NATIONAL OVERVIEW

Current Situation

The continued deterioration of the macroeconomy remains a key driver of acute food insecurity. This has been compounded by widespread impacts associated with COVID-19 measures taken by the government as well as consecutive years of drought and poor harvests. The confirmed number of COVID-19 cases continues to increase, with 591 cases as of June 30, up from just 30 at the beginning of May. Seven associated COVID-19 deaths have been recorded. Most of the confirmed cases are associated with returnees from South Africa and Botswana.

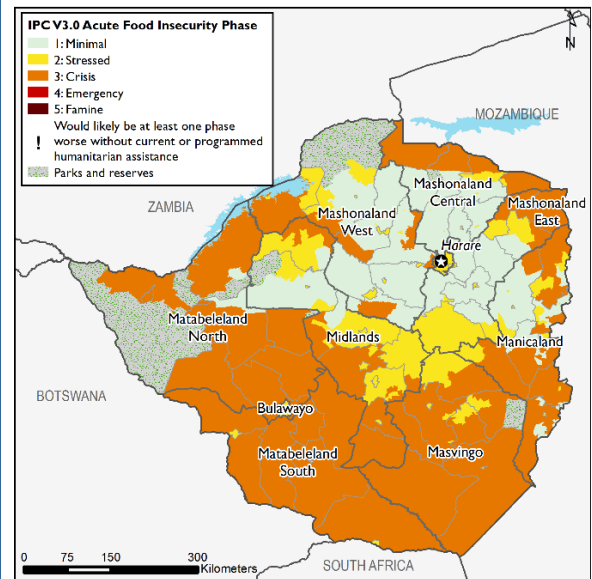
In mid-May, the government indefinitely extended Level 2 lockdown measures including the closure of national borders except for essential goods and services and the ban on inter-city and rural-urban public transport services. Formal businesses resumed operations although with strict COVID-19 precautionary measures. Many businesses have been affected, either reducing operation times and staffing, and/or decreasing wages or salaries. Prior to COVID-19, most incomes earned in the formal sector were well below the poverty line.

According to the IMF in 2018, Zimbabwe was the second most informalized economy in the world after Bolivia. Until mid-June, most informal sector activities remained banned, besides main urban produce markets, operating under restricted hours. Informal cross border trade, remittances, mainly with South Africa, a key trade partner, remained constrained. IOM reported regular cross-border movement at the Beitbridge border post decreased by 95 percent from March to April/May. The disruption of informal sector activities has severely affected rural and urban household incomes given that these makeup about three-quarters of national employment according to ZIMSTAT.

In mid-June, the government announced informal sector activities could resume operations after registering with local authorities and meeting COVID-19 containment conditions. As such, there has been some increase in informal sector activities, though rather slowly. Some local authorities are yet to set up new/refurbished market sites and many households lack the capital to resume business. Other activities like informal cross-border trade remain banned. The continued travel restrictions and ban on privately owned public transport for rural-urban and inter-city routes are compounding the situation for the informal sector.

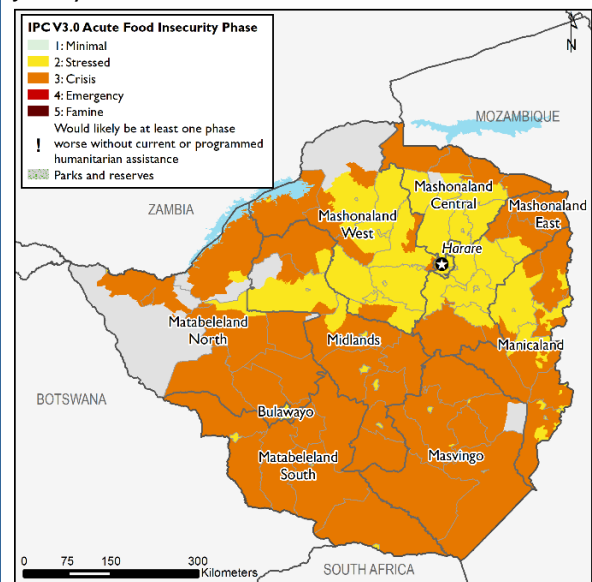
Macroeconomic conditions continue to be volatile. ZIMSTAT reported annual inflation for May at 786 percent, up from 766 and 676 percent in April and March, respectively. From early May to mid-June, the local currency depreciated by over 80 percent against the USD, climbing from around 50 ZWL/USD to 90 ZWL/USD (Figure 2). The Reserve Bank of Zimbabwe (RBZ) has instituted several measures in attempts to calm the parallel market exchange rates. Notably, in late June the RBZ abandoned the fixed official interbank rate of 25 ZWL/USD which prevailed from March. This was replaced with a weekly auction system determining the official weekly foreign exchange rate. The first foreign exchange auction occurred on June 23, with the official rate set at about 57 ZWL/USD, which was more than double the previous official rate but about 40 percent lower than the prevailing parallel market rates.

Projected food security outcomes, June to September 2020



Source: FEWS NET

Projected food security outcomes, October 2020 to January 2021



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.

With the new exchange rate, the government immediately announced new fuel prices resulting in a 150 percent increase in fuel prices, which had already increased 30 percent in early June. Fuel price increases have pushed up prices of other commodities and services. Moving forward, fuel prices will be reviewed following the foreign currency auctions on a weekly basis.

Spiking parallel market exchange rates are the main driver of volatile and sharp increases in the prices of goods and services. ZIMSTAT reported a 14 percent increase in the food poverty line¹ and the total poverty consumption line² from April to May. The April increases were 22 percent and 16 percent above March levels, respectively. The Consumer Council of Zimbabwe (CCZ) indicated the cost of living for an average urban household of six rose 22 percent between April and May. The CCZ calculated food basket increased 35 percent over the same period. Unfortunately, household incomes for most poor households are relatively stagnant and have not increased with the cost of living.

In the month of June, commodity prices recorded their highest increase compared to recent months. Sugar, bread, and cooking oil prices almost doubled compared to May prices. High price increases are also being driven by critical shortages of some basic commodities such as maize meal, cooking oil, and sugar. Most goods and services are increasingly being priced in USD. This is further constraining access to market foods as many poor households do not have access to USD. At the same time, however, those households with access to USD especially in the urban informal economy are expected to increasingly use this foreign currency, improving market access. Purchases especially on informal markets made using mobile money incur fees up to 50 percent more than when using local cash (bond notes and coins and new ZWL notes), which are scarcely available. Anecdotal information indicates bond notes and coins are increasingly being rejected across some markets.

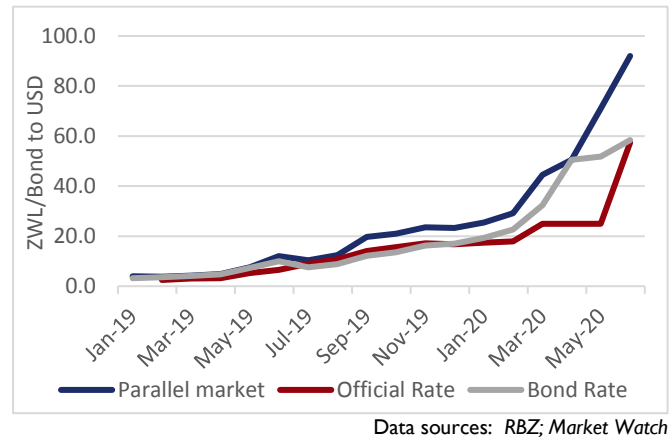
At the start of the 2020/21 consumption year in April, Zimbabwe had nearly no carryover stocks from last season’s harvest. The 2020 Second Round Crop and Livestock Assessment estimates total maize production at about 908,000 MT (Figure 2), which is nearly 20 percent above last year, but 30 percent below the five-year and ten-year averages. The government estimates the national food deficit (inclusive of pulses and legumes) to be nearly 1.2 million MT for the 2020/21 marketing and consumption year, although some independent estimates indicate a deficit of over 1.0 million MT for maize only. Official production estimates for other crops, such as pulses and legumes are above last year’s production, but also below average.

Production in typical deficit-producing areas was very poor and in worst-affected areas, some households did not harvest due to total crop failure or having not planted at all. The government estimates 12 of the 60 rural districts in the country harvested maize grain that will last up to 3 months. However, in other areas, government production estimates are somewhat better than what was previously anticipated. Many of the districts’ harvests are expected to meet self-sufficiency for four to six months; some surplus-producing districts had a harvest that is expected to last 10 or more months.

Tobacco sales started at the end of May, a month late due to COVID-19 precautions. Farmers were concerned with the loss of potential earnings as payment was half in USD and half ZWL, with the ZWL portion pegged to the then fixed rate at 25 ZWL/USD. As a result, some farmers reportedly withheld their crop from the markets. Deliveries are likely to increase now with the introduction of the foreign exchange auctions. The Tobacco Industry and Marketing Board (TIMB) projects this season’s output at 225 million kg down from last season’s all-time high of 259 million kg. The sale of tobacco is improving incomes for farmers and communities in tobacco-producing areas mainly in the Mashonaland and Manicaland Provinces.

In mid-June, the government announced the new cotton producer price of about 44 ZWL/kg, paid partially in USD, although mostly in ZWL. Farmers are requesting to be paid more in foreign currency. The government estimates cotton production will

Figure I. USD to ZWL monthly average exchange rate from Jan 2019 to June 2020



¹ The food poverty datum line (FPL) represents the minimum consumption expenditure necessary to ensure that each household member can (if all expenditures were devoted to food) consume a minimum food basket representing 2 100 calories. An individual whose total consumption expenditure does not exceed the food poverty line is deemed to be very poor.

² The FPL was derived using 2017 PICES data. It was derived by computing the non-food consumption expenditures of poor households whose consumption expenditures were just equal to the FPL. The amount was added to the FPL, if an individual does not consume more than the TCPL, he or she is deemed poor.

be about 32 percent above last season’s production. Cotton is a notable income source especially in some food deficit-producing areas.

Water availability and access remain limited following the poor 2019/20 rainfall season in traditional low rainfall areas of Matabeleland, Masvingo, and parts of Manicaland and Midlands Provinces, as well as the extreme northern parts of the Mashonaland Provinces. Pasture and vegetation conditions never fully regenerated in such areas and are currently poor (Figure 3). As a result, livestock body conditions, mainly cattle, are generally poor; however, goats are in good condition. Water and pasture availability in northern areas where rainfall was relatively better is fair to good, as are livestock conditions. Water access is limited in some urban centers across the country. In one of the worst-affected cities, Bulawayo, reservoirs are significantly below normal. For most parts of the city, water is available just one day a week. The city recorded over 10 deaths attributed to water-borne diseases in one of the high-density suburbs in mid-June.

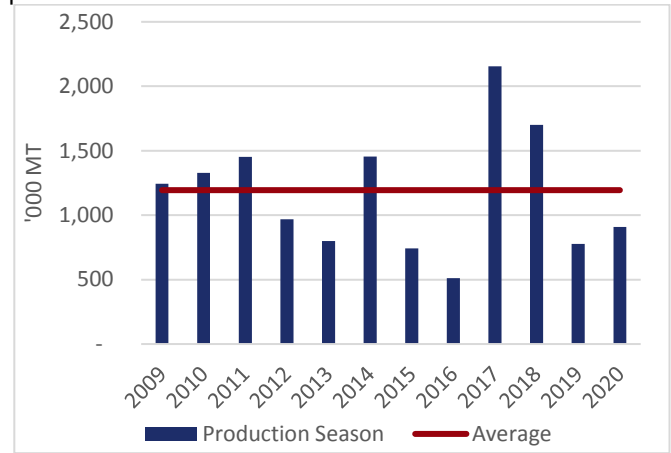
Maize grain supplies on the markets across the country remain low due to below normal harvests. Significant maize grain imports continue to be recorded mainly from South Africa, an atypical occurrence during this time of the year. This maize grain is likely to be mostly targeted for commercial maize meal production. Grain flows from surplus-producing to deficit-producing areas are very limited. There are also standing restrictions to the amount of grain that can be transported freely, except if destined to the GMB. This is further compounded by current COVID-19 related travel and public transport restrictions and high transportation costs.

The Grain Marketing Board (GMB) started receiving grain from some farmers mostly in surplus-producing areas. The GMB increased the maize and small grain producer prices in response to mounting inflation. In April, maize and small grain producer prices were increased by 77 percent and 85 percent, respectively. At the end of May, the government announced a further 30 percent increase to farmers who deliver grain by the end of July. With maize grain now selling at about 16,000 ZWL/MT and small grains at 16,700 ZWL/MT, these prices are over 10 times than at the same time last year. In order to appeal more to farmers, the GMB has promised payments in 2 to 3 days. Private buyers are reportedly paying less than the GMB prices – attracting some farmers through immediate payments in cash.

Shortages of maize meal continue in the markets as government-subsidized maize meal (sold at 70 ZWL/10kg) is not readily available due to shortages of grain supplies to millers. Unsubsidized unrefined maize meal is rarely available in supermarkets and other retail outlets, although when available prices are up to five times the price of subsidized commodities. Some commercial millers are producing mainly refined brands which are very expensive for most poor households. The situation is most critical in remote rural areas which hardly receive subsidized maize meal. In urban areas, some poor households are coping by buying small quantities (*tutsaona*) of maize meal and other basic food stuffs on the informal markets enough for one or a few meals. In view of the critical maize meal situation, the government in May lifted the maize meal and wheat/flour import duty to allow for more stocks into the local markets.

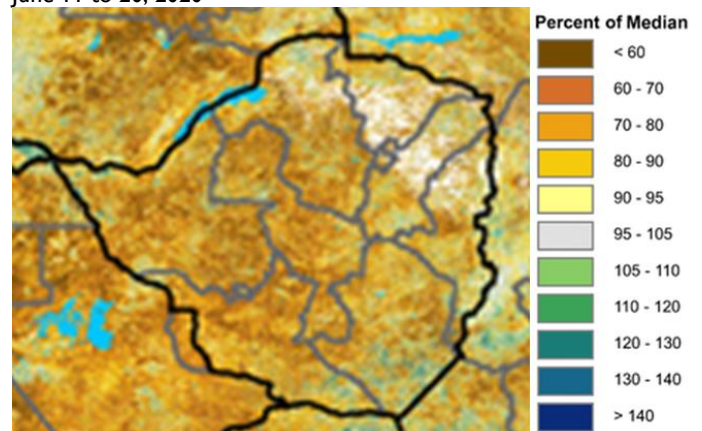
Incomes from crop and livestock sales for this time of the year are below average, especially in deficit-producing areas. Agricultural and non-agricultural labor opportunities are also below-normal following the poor harvests as well as the challenging macroeconomic context and COVID-19 related restrictions. Some households are engaging in petty trading, vegetable productions and sales, and self-employment. In some areas, household members are engaging in informal mining

Figure 2: Zimbabwe maize production by season for 2009 to present



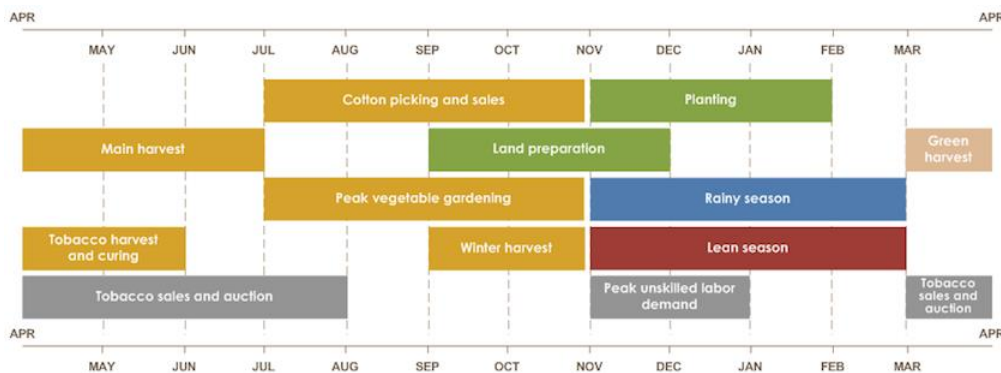
Data source: Ministry of Agriculture

Figure 3. Normalized Difference Vegetation Index (NDVI) for the June 11 to 20, 2020



Source: USGS/FEWS NET

SEASONAL CALENDAR FOR A TYPICAL YEAR



Source: FEWS NET

enterprises, while others sell wild products such as grass and fuelwood to earn income. Labor rates, including in-kind payments are below average as payment capacity for middle and better-off households is also limited. Remittances both from abroad and domestic, mainly from urban to rural areas, are below-average. Poor households, many of whom had limited to no harvests are having difficulty accessing market foods due to below-average incomes and atypically high food prices.

Government efforts to cushion vulnerable households and businesses affected by COVID-19 are reportedly being affected by resource challenges. Around 200,000 households were reportedly targeted to receive 300 ZWL/month/household from April to June. Businesses across various sectors affected by COVID-19 are reportedly also targeted for assistance with low-interest loans. WFP extended the 2019/20 Lean Season Assistance to reach about 1.5 million rural people in May with similar levels of assistance in June, meeting about 60 percent of a household's kilocalorie needs.

In some typical surplus-producing areas, food security outcomes are better than previously anticipated and better than last-year as household access not only to food, but also to incomes have improved as crop production was better than last-year and larger than previously anticipated. While production was not typical, it is still supplying most poor households with enough food for consumption of own foods. Household livelihoods in these areas are heavily reliant on crop production and labor, which is facilitating the access to income through crop sales, self-employment activities, and petty trade for households to meet their non-food needs. Additionally, some households are earning income through vegetable production and sale. As a result, Minimal (IPC Phase 1) outcomes are present, while some areas where production was slightly lower and access to income sources are somewhat poorer, Stressed (IPC Phase 2) outcomes are present.

Humanitarian assistance is improving food consumption in some areas of the country and Stressed! (IPC Phase 2!) outcomes are present. However, elsewhere across typical deficit-producing areas in the south, west, and extreme north, households are employing consumption-based coping strategies including decreasing the number of meals consumed a day to one and reducing portion sizes. As a result, Crisis (IPC Phase 3) outcomes are present in these areas.

In urban areas, Crisis (IPC Phase 3) outcome currently prevail following the stringent restrictions on informal sector activities up till mid-June as well as basic commodity shortages and above-average prices.

Assumptions

The June 2020 to January 2021 most likely scenario is based on the following national-level assumptions:

- The number of COVID-19 positive cases are anticipated to continue to increase in the coming months mainly through returnee citizens. Some projection models indicate the cases will likely peak around July/August. As a result, the government is likely to maintain some COVID-19 measures at least through the fourth quarter of the year, the main being border restrictions. Other restrictions may be relaxed as the government periodically reviews the situation.
- Neighboring countries, specifically South Africa and Botswana, are also likely to continue similar control measures, restricting informal cross-border activities. However, illegal cross border activities are expected to continue given the lengthy borders and numerous illegal crossing points.
- Large numbers of people employed in both the formal and informal sectors will most likely continue to earn below-normal incomes. A large section of the informal sector in both urban and rural areas will likely face challenges resuming

activities following COVID-19 disruptions due to lack of capital or social support systems and local authorities' compliancy requirements.

- Below-average international and local remittances are expected throughout the outlook period due to the global economic slowdown, continued very poor macroeconomic conditions in Zimbabwe, the increase in the number of returning migrants, and many migrants struggling economically in other countries. The southern and western parts of Zimbabwe will be worst affected as they are traditionally heavily reliant on remittances from South Africa.
- The macroeconomy is expected to remain volatile. Despite recent RBZ measures, parallel market exchange rates are likely to continue to influence pricing on the markets. The increasing use of the USD for local transactions is expected to affect poor households earning in local currency. However, the same is expected to improve income and market access for those poor households earning in USD especially in the informal sector.
- Since the government has stopped subsidizing fuel, regular fuel price increases, nearly on a weekly basis, are expected as prices will likely move in tandem with prevailing official exchange rates, driving the prices of other goods and services. Electricity shortages and tariff increases are also expected to continue.
- Shortages of some basic commodities and above average and increasing prices of basic food commodities are expected throughout the outlook period, including maize meal, cooking oil, sugar, and flour.
- The government, private sector, and other maize grain imports are will not likely meet the need due to likely foreign currency shortages and logistics challenges. Imports are likely to be mostly from South Africa, which realized above-average maize production for the 2019/20 season.
- Maize grain supplies are expected to remain lower than normal across the markets in both surplus- and deficit-production areas. Most markets are expected to be without grain during the lean season when demand will be significantly above average. In some deficit-producing areas stocks are expected to be limited or to run out from as early as June. Shortages in surplus areas are expected to start around September.
- Demand for maize meal is expected to be above average throughout the outlook period. Unfortunately, due to maize grain shortages and expected limited supplies and imports by commercial millers, maize meal shortages are expected to continue in the formal retail markets with stocks being available on the informal markets.
- Maize grain and maize meal prices are expected to remain over ten times above last year and the average throughout the outlook period. Informal market prices for maize meal will likely remain significantly higher than formal retail prices.
- Below-average opportunities for self-employment, petty trade, cross border trade, and other informal sector activities are likely as a result of the poor macroeconomy and impacts of COVID-19, including travel and border restrictions. This will mainly impact the urban poor whose reliance on these sources is higher than in rural areas.
- Below-normal winter crop production is most likely due to inadequate water supplies, especially in low rainfall areas. The high cost of fuel and electricity will also impact production resulting in reduced food access and incomes for respective farmers and other households. However, increased winter wheat production due to government support mainly in the Mashonaland Provinces is expected to lead to increased localized labor availability for poor households in these areas.
- Livestock body conditions are expected to deteriorate earlier than normal in typical semi-arid areas as water, pasture and supplementary feeds are likely to be limited. Based on recent trends, the prevalence of livestock diseases is expected to be higher than normal as many households are not able to access veterinary drugs for their livestock. Livestock poverty deaths are likely to be higher than normal.
- Livestock prices are expected to be below average, limiting incomes across wealth groups due to poor livestock conditions and decreased herd sizes through late 2020. Poor households are expected to rely mostly on the sale of small livestock. Reliance on animal products such as milk and meat will also be below normal especially among the middle and better-off households.
- Based on international forecast models, a normal start to the 2020/21 season and average precipitation from October through January are expected; however, there is some uncertainty as this is a long-term forecast, and as there is an elevated probability of La Niña conditions. La Niña conditions typically drive above-average rainfall in Southern Africa.

- Access to agricultural inputs for the 2020/21 agricultural season is expected to be below-average due to high prices, below-average incomes, and likely below-average agricultural input assistance from the government.
- The availability of agriculture labor is expected to be minimal through October specifically in deficit-producing areas; however, it will most likely improve with the start of the 2020/21 rainfall season especially in surplus-producing areas. Wage rates are expected to be below-average and lower than last year as the middle and better-off households' typical livelihoods are impacted by the poor 2020 harvest, the poor macroeconomy, and COVID-19 related challenges. In-kind payments will be limited due to critical shortages and high costs of basic commodities; cash payments will be constricted due to poor incomes and liquidity. Following consecutive droughts, water availability is expected to continue to deteriorate. Larger than normal groundwater deficits and below-average soil moisture are anticipated through at least October/November. The situation is anticipated to improve with the start of the 2020/21 rainfall season.
- For the 2020/21 rural Lean Season Assistance, WFP currently plans to reach around 1.8 million rural people from July to September. Between October and December, assistance is expected to be scaled-up covering nearly 3.5 million people, with further scaling-up in January to nearly 4.5 million people through April. The main food basket is expected to meet nearly 60 percent of households' kilocalorie needs. In urban areas, WFP plans for cash-based assistance to reach 550,000 people monthly from July 2020 through April 2021. While this assistance has been planned, it has not been included in this analysis as funding has not been confirmed and detailed information was not available. Humanitarian plans from the government were not available.

Most Likely Food Security Outcomes

Previously FEWS NET anticipated that poor households in surplus-producing areas of the country would have exhausted own produced food for own consumption in June/July and access to income would be limited from staple and produce production which is a major income source for poor and very poor households. However, based on newly available data on crop estimates and key informants, FEWS NET now expects poor households in some surplus-producing areas are expected to meet their minimum food needs from own-produced stocks through at least late-August/September. Additionally, households are expected to sell a portion of the crops, not only maize, but sweet potatoes, groundnuts, beans, and produce to meet their non-food needs during this period. Other households are expected to access income from on-farm and off-farm casual labor, informal mining, and petty trade. As a result, Minimal (IPC Phase 1) outcomes are expected in many surplus production areas through September. Stressed (IPC Phase 2) outcomes are expected in some surplus production areas where production was lower and households are expected to face difficulty meeting their non-food needs.

Across deficit-producing areas of the country and urban areas, Crisis (IPC Phase 3) outcomes are expected to persist from June to September as reliance on markets at atypically high prices is anticipated to limit food consumption. During this period, these households are expected to engage in coping strategies such as limiting meal frequency and quantity, atypical sale of livestock, and in some cases labor migration.

Through September, there is likely to be an increase in the Global Acute Malnutrition (GAM) prevalence beyond the national average of 3.4 and May 2019 National GAM prevalence at 3.6 percent. However, the prevalence of GAM is likely to remain less than 5 percent and within the "acceptable" range of the WHO classification scale.

Many poor households in surplus-producing areas of the country will most likely exhaust own-produced foods in late August/September. From October, poor households in these areas are expected to rely mainly on markets for food with below-average purchasing power. As a result, Stressed (IPC Phase 2) outcomes are expected across the country through at least January 2021.

From October to January, as poor households are expected to face increasing food consumption gaps and engage in consumption or livelihood-based coping that result in the accelerated depletion or erosion of household assets, Crisis (IPC Phase 3) outcomes will continue in many typical deficit-producing areas of the country. Households are expected to increasingly reduce the quantity and frequency of meals. To access food, households are expected to engage in bartering, atypical livestock sales, and selling of productive assets, and in the most extreme cases, labor migration and borrowing are likely. Emergency (IPC Phase 4) is expected in some worst-affected households in areas of the country where households did not have a harvest and are expected to engage in extreme levels of coping. Given that the median GAM prevalence for the last five years has been below 5 percent, the national median prevalence during the October to January period is expected to increase but remain below 5 percent (Acceptable). Only some localized areas may deteriorate to Alert (5.9-9.9 percent). In urban areas, improved incomes from the reopened informal sector between July and January, though still below normal,

will likely result in Stressed (IPC Phase 2) outcomes. Some of the poor urban households are expected to start earning in USD especially in the informal sector, helping cushion them from volatile price increases in ZWL.

Events that Might Change the Outlook

Possible events over the next eight months that could change the most-likely scenario.

Area	Event	Impact on food security outcomes
National	Low/reducing or stable foreign currency exchange rates	Will curb the high inflation and volatile market conditions with improved basic commodity availability, stabilize prices of goods and services, enhance livelihood options and incomes thereby improving access to food on the markets especially among poor households
National	Government price controls	Will result in increased basic commodity shortages and spiking prices, further constraining household access to food
National	Late start, below average and poorly distributed 2020/21 rainfall	Will further decrease casual labor opportunities and rates, resulting in further deterioration of livestock and impact livestock sales especially in typical semi-arid areas
National	COVID-19 measures especially national border, travel and public transport restrictions are lifted	Will improve livelihoods especially in the informal sector which mainly depend on informal imports; improve remittance flows; will improve migrant labor opportunities especially in southern areas heavily reliant on South Africa

AREAS OF CONCERN

Beitbridge South Western Lowveld Communal Livelihood Zone (Focus on Beitbridge District)

Current Situation

The Beitbridge South-Western Lowveld Communal (BSWLC) Livelihood Zone is in the extreme south of Zimbabwe bordering South Africa and Botswana. The zone is characterized by very low annual rainfall and high temperatures. Livelihoods are mainly agro-pastoral, with low potential for cereal production and moderate to high potential for livestock production. Other income sources include local casual labor, seasonal labor on A2 and large-scale commercial farms, and migratory labor to South Africa and Botswana. Remittances especially from South Africa and Botswana constitute a major income source. Additional information on the major characteristics of the BSWLC LZ can be found in the [Zimbabwe Rural Livelihood Baseline Profiles](#).

Due to the multiple false starts and poorly distributed rainfall (Figure 5), most households in Beitbridge District did not plant despite receiving crop input assistance from the government. The extended dryness caused **widespread crop failure**. As a result, most households in Beitbridge District did not have a harvest this season with only few households harvesting very small quantities of small grains, which is equivalent to about a month of household supply. Production and cereal availability estimates from provincial authorities indicate the district has nearly a 95 percent food deficit for the 2020/21 consumption season, one of the highest such deficits in recent history.

Figure 4. Area of concern map for the Beitbridge South Western Lowveld Communal Livelihood Zone



Source: FEWS NET

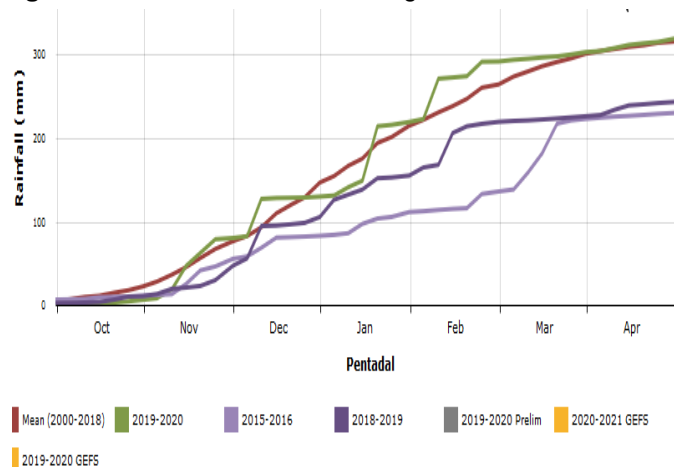
Currently water access is fair to poor as there was minimal recharging of ground water and very few localized water reservoirs have water. In most areas, pastures did not regenerate, and pasture availability is below average. Furthermore, the above normal Mopane worms in April consumed most Mopane tree leaves on which livestock depend, further limiting livestock browse. Some households started moving their cattle atypically early from communal areas with limited pasture to areas where pasture is relatively better although even there, conditions are already deteriorating.

Cattle body conditions are fair to poor in the district while goats are in good condition. Of all provinces, Matebeleland South Province recorded the highest number of cattle deaths last season due to drought, with Beitbridge being the worst affected of all districts with reportedly a loss of more than 6,000 cattle in 2019. Most farmers cannot afford commercial supplementary

feeds. South Africa is a major source of cheaper commercial feeds; however, there is limited ability to access this market due to border closure. Additionally, there is a high prevalence of livestock diseases with irregular dipping services.

Most markets across Beitbridge have no maize grain and limited maize meal. Subsidized maize meal is also in short supply; however, unsubsidized maize meal in some formal markets is highly priced. Owing to the border closure, typical maize meal flows from South Africa are minimal, occurring through illegal crossing points. Imported maize meal is available on some informal markets where it is sold in South African Rands (ZAR). Livestock sales are currently low due to poor demand. Some livestock are being cheaply sold, losing on potential income. Livestock sales are mainly happening at the farmer level and the main buyers are butcheries and abattoirs. Livestock is sold only in South African Rands and USD at lower than normal prices.

Figure 5. Rainfall distribution in Beitbridge District, 2019/20 season



Source: USGS/FEWS NET

Due to its proximity to South Africa, remittances are important for this area and they have significantly decreased following the COVID-19 border and travel restrictions. The district is also receiving high numbers of returning desperate migrants from South Africa and Botswana. The border restrictions have critically impacted most informal sector activities, including cross border trade, petty trade, informal transport and courier services. However, illegal cross border movements are reported to be common across the Limpopo River, bringing in a variety of food and non-food commodities. Besides, some long-distance truckers are reportedly being used as conduits for commodity imports destined to this zone.

Labor opportunities and rates are significantly below average due mainly to macroeconomic challenges and COVID-19 related income disruptions. Seasonal casual labor opportunities across the border in South Africa (e.g. harvesting on the farms) are significantly limited this season due to COVID-19 border closure and travel restrictions. Whereas local labor availability is higher than normal for this time of the year, the middle and better-off households have also been affected and cannot engage the poor for services.

COVID-19 ban on public transport has resulted in critical transport shortages and high transport costs affecting livelihood activities and access to markets. Local informal markets have also been disrupted through closures in some areas, and stringent operational conditions and times.

Current food consumption for poor households in Beitbridge District is very poor and Crisis (IPC Phase 3) outcomes are present. Most poor households are generally consuming one meal a day. The basic meal consists of staple *sadza/isitshwala* and little fresh or dried vegetables, or Mopane worms (*amacimbi*) which were in abundance this season and are also an income source. There is very little to no consumption of food crops such as groundnuts, cowpeas, Bambara nuts and watermelons which are typical at this time of year. Due to critical maize meal shortages, some poor households are relying on tea or porridge sometimes without sugar or *amaheu* (cereal drink made of maize meal), which is typically consumed during the lean season.

Assumptions

The most likely scenario for this district is based on similar assumptions as in the national overview.

Most Likely Food Security Outcomes

Crisis (IPC Phase 3) outcomes are expected throughout this outlook period. The extremely poor 2020 harvests mean most households will have no own-produced crops with most households relying on markets foods. It is anticipated that the COVID-19 border restrictions will remain in place, impacting interaction with mainly South Africa and Botswana. Typical incomes from cross-border trade, petty trade, informal transport and courier services will be below normal. In-country and foreign (mainly South Africa and Botswana) cash and in-kind remittances are expected to remain significantly below average, as will be seasonal migrant labor. Some households are expected to access income or food through illegal cross border movements

for labor and cross border trade, and courier services for illegally imported goods, and potentially borrowing and migrating. Others are increased sale of livestock, reduced expenditures on health and education, and other basic costs.

Based on ZIMVAC May 2019 assessment, the latest Beitbridge District GAM prevalence was 3.66 percent which is within the “Acceptable” category according to the WHO Classification. During this period GAM prevalence will likely increase beyond average though expected to remain below 5 percent (Acceptable) from June through September.

From October through January, GAM prevalence will likely increase beyond June to September levels; however, it will likely remain below 5 percent (Acceptable). Some localized parts of the district may experience worse outcomes and deteriorate towards Alert (5.9-9.9 percent).

During the period, food consumption gaps are expected to persist with Crisis (IPC Phase 3) outcomes present. Worst-affected households that are likely to experience Emergency (IPC Phase 4) outcomes and engage in extreme coping.

Events that Might Change the Outlook

Possible events over the next eight months that could change the most-likely scenario.

Area	Event	Impact on food security outcomes
BSWLC Livelihood Zone	COVID-19 measures especially national border, travel and public transport restrictions are lifted	Will result in increased cross border trade, petty trade, informal transport services, availability of basic commodities, remittance flows, migrant labor opportunities mainly in South Africa and Botswana leading to improved food security outcomes among some of the worst affected populations
	Late start, below average and poorly distributed 2020/21 rainfall	Will likely result in above average and potential record livestock (mainly cattle) deaths impacting household incomes
	No/delayed or significantly low humanitarian assistance	Will result in extreme coping especially from October to January and more severe food security outcomes.

Harare Urban

Current Situation

With more than 2.6 million people, Harare’s population makes up about 20 percent of the national population and 50 percent of the urban population. Official national unemployment rate is about 16 percent. In Harare, official unemployment is around 9 percent, lower than the national average. However, independent estimates indicate much higher national unemployment rates. The poor macroeconomy is critically impacting low-income households in Harare with most of the urban poor having little to no savings and living from hand to mouth, while some are in debt. Most incomes for low-income households in Harare are below the ZIMSTAT food and total consumption poverty lines (Figure 7).

Most low-income households in Harare lost their typical sources of income following COVID-19 restrictions. Until mid-June, most informal sector enterprises remained banned including street vending and petty trading. Some of the traders/enterprises lost their stock or structures when markets were closed, and illegal structures destroyed. Informal cross border traders cannot operate as the borders are closed. Besides, disposable incomes are very low on the markets impacting on demand for products and services. Moreover, privately-owned formal transport operators (*kombis*) as well as informal transport operators (*mishikashika*) remain banned. However, since mid-June when most informal sector activities could restart, the situation is slowly improving, though incomes remain below normal. However, the USD earnings from some of the activities will enhance access to markets and food consumption.

Figure 6. Area of concern map for Harare



Some domestic workers were also impacted by government restrictions associated with COVID-19 through job losses and reduced wages. In mid-June, the government increased the minimum wage for domestic workers averaging 950 ZWL per month (about 17 USD per the new official exchange rate), although still falling far below the food poverty and total consumption poverty lines. Some low-income earners in the formal sectors were laid off or experienced reduced earnings. Moreover, other poor urban households also receive remittances, which have also decreased. In June, government increased salaries for government workers by 50 percent in ZWL and introduced a USD COVID-19 allowance for the workers and pensioners for three months.

For most poor urban households with no own-accommodation, rentals are very high and increasing, with most houseowners now charging in foreign currency. Most poor households' incomes are very low. Some urban poor households end up coping by reducing number of rooms thereby crowding in very limited spaces, sending some household members to rural areas, and/or relocating to cheaper peri-urban areas.

Most low-income households in Harare's high-density areas and peri-urban informal settlements face chronic water challenges. The local authority has for long not been able to supply water to many areas, some of which are not even connected to water mains. The public water points (mainly boreholes) are often crowded due to high demand. Most privately owned deep wells are expected to run out of water in a month or two following the poor rains. Harare has a high proportion of deep wells and boreholes contaminated due to poor sewage and waste disposal systems. Water borne diseases have commonly occurred in some of Harare's high-density areas such as Glen View and Budiriro.

Most poor-income households in Harare also face critical challenges with regards to energy needs for cooking and heating. Some low-income areas are not connected to electricity mains and even for those who are connected, electricity tariffs are unaffordable. Alternative sources of energy such as gas are also unaffordable. Fuel wood has become very expensive due to reduced supply following COVID-19 travel and transport restrictions as well as high demand. Fuel wood harvesting from nearby forest areas is illegal and under strict monitoring by local authorities and environmental agencies.

Urban and peri-urban production was below-normal in Harare for those households who engaged in urban agriculture. In April, WFP assisted just 100,000 urban people in 8 urban domains including Harare and Bulawayo with 9 USD/person, leaving out most poor households in need.

Current livelihoods and consumption coping among the urban poor include increased vending and petty trade. Some of these activities are being done during the night to avoid security detection. Some households purchase very small portions of food (*tutsaona*), maize meal and cooking oil from the informal markets. Some purchase and consume less preferred foods, skipping meals, reducing portion sizes, and preferential feeding for children. In the worst case, households are borrowing, relocating to cheaper places of residence, moving in with relatives, and relocating to rural areas. Others are seeking odd casual jobs which may be paid in USD. As a result, food consumption for low-income households is generally poor and Crisis (IPC Phase 3) outcomes are currently present.

Assumptions

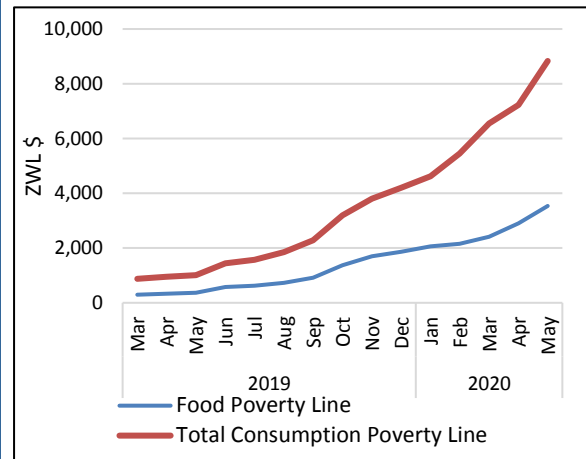
Most of the assumptions for Harare are covered under the national assumptions.

- WFP plans to increase urban food assistance to reach about 550,000 people between July 2020 and April 2021 across 8 urban areas and cash assistance to 13 USD from 9 USD including Harare. The government plans to assist vulnerable households and businesses affected by COVID-19 though plans are reportedly being hampered by inadequate resources.

Projected Food Security Outcomes

Harare will likely experience Stressed (IPC Phase 2) outcomes from July through January with some households experiencing Crisis (IPC Phase 3). Low-income households are expected to continue to experience below-normal incomes due to on-going macroeconomic challenges, COVID-19 impacts, and the 2020 poor harvest. Shortages and high and increasing prices of basic

Figure 7. Harare Food and Total Consumption Poverty Lines for a 5-Member Household, March 2019 to May 2020



Data source: ZIMSTAT

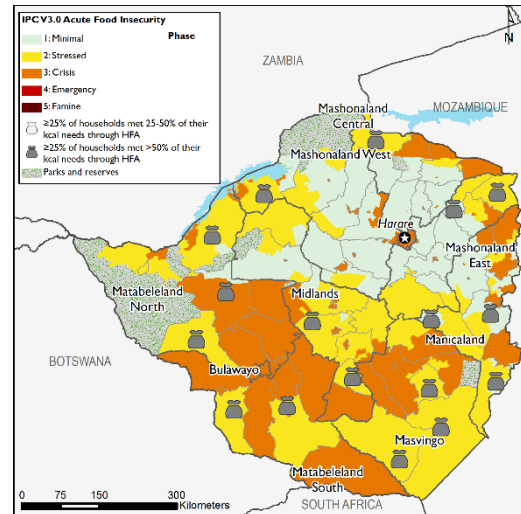
food and non-food needs will severely impact the poor. However, the easing of some COVID-19 restrictions will likely result in improved incomes from informal sector activities. Furthermore, these incomes are increasingly expected in USD.

Following poor rains, receding water tables and increased water challenges in Harare from June through November will mean most poor households will likely experience poor access and utilization of water. This may lead to unhygienic practices that will promote water-borne diseases. Also, from November through January during the rainy season, the fact that most low-income households are in areas poorly served with good water and sanitation facilities, this may increase potential water source contamination and again lead to water borne diseases.

MOST LIKELY FOOD SECURITY OUTCOMES AND AREAS RECEIVING SIGNIFICANT LEVELS OF HUMANITARIAN ASSISTANCE*

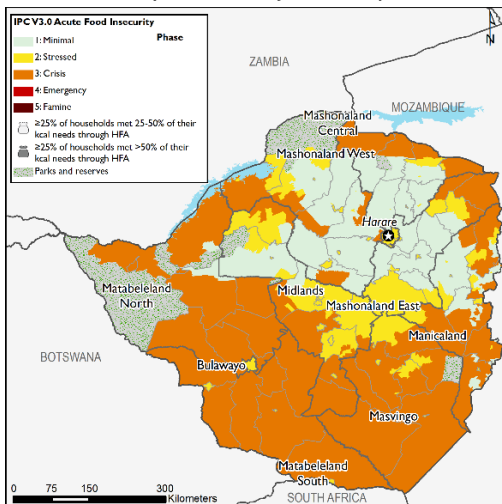
Each of these maps adheres to IPC v3.0 humanitarian assistance mapping protocols and flags where significant levels of humanitarian assistance are being/are expected to be provided. 🏠 indicates that at least 25 percent of households receive on average 25–50 percent of caloric needs from humanitarian food assistance (HFA). 🏠 indicates that at least 25 percent of households receive on average over 50 percent of caloric needs through HFA. This mapping protocol differs from the (!) protocol used in the maps at the top of the report. The use of (!) indicates areas that would likely be at least one phase worse in the absence of current or programmed humanitarian assistance.

Current, June 2020



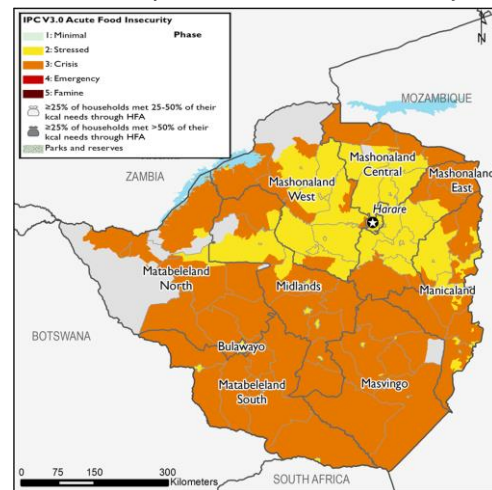
Source: FEWS NET

Projected food security outcomes, June to September 2020



Source: FEWS NET

Projected food security outcomes, October 2020 to January 2021



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.

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.](#)