Food Security Situation Update for May 2020

Updated 08/06/2020

Highlights:

The 2020 Second Round Crop and Livestock Report shows that the estimated cereal production of about 1.1 million remains 41% below the national human requirement, hence the need to fill in the gap through commercial imports. Yield by communal farmers remain very low at 0.33 metric tonnes/hectare in comparison to the 1.82 metric tonnes/ hectare by A2 farmers.

The 2020 Second Round Crop and Livestock Report revealed that about 20% of the rural districts i.e. 12 districts out of the 60 rural districts harvested cereal that is adequate to cover at most 3 months; and an additional 21 districts or 35% harvest cereal adequate to cover between 4 – 6 months, pointing to another failed harvest.

COVID-19 cases in Zimbabwe have increased from 31 cases reported at the end of April to 149 at the end of May 2020. This is an indication that restrictive measures will continue and the impact of such measures on the vulnerable will continue to be felt.

Prices of basic food commodities increased by an average of 33% over the month of May 2020, with unrefined maize meal recording the highest percentage increase of 50%. These price increases are against a backdrop of decreasing income due to the COVID-19 pandemic.

The year on year inflation increased from 676% in March to 766% in May 2020 while the month-on-month inflation decreased from the 26.59% in April to 18% in May. Food remains the main driver of inflation estimated at 908% in April 2020 an indication of increased vulnerabilities.

Maize grain availability marginally improved with the incoming of the harvest, a situation which is likely to continue into May as the A1 and A2 farmers start selling their produce on the market.
1. The Performance of the 2019/20 Cropping Season

The 2020 Second Round Crop and Livestock Report showed yet another failed cropping season. This comes at the backdrop of another poor season making it two consecutive failed seasons (figure 1). The report estimated maize production at 908,000 Mt which is 17% more than the 777,000 Mt produced during the 2018/2019 season. The report also showed an improvement of about 102% for small grains production estimated at 152,000 Mt compared to the 75,000 Mt in the 2018/19 season. This brings the total cereal production to 1.1 million Mt in comparison to the 852,000 Mt in the 2018/19 season. The current maize grain production is 24% below the 5year average of 1.2 million Mt.

![Maize grain production trends](image)

**Source**: 2020 Second Round Crop and Livestock Report

Despite the marginal improvements reported, the production falls 41% below the human consumption requirement of about 1.8 million.

### Table 1: Maize grain production by sector

<table>
<thead>
<tr>
<th>Sector</th>
<th>Area (Ha)</th>
<th>Yield (t/ha)</th>
<th>Production (MT)</th>
</tr>
</thead>
<tbody>
<tr>
<td>CA</td>
<td>884,653</td>
<td>0.33</td>
<td>291,867</td>
</tr>
<tr>
<td>OR</td>
<td>156,511</td>
<td>0.57</td>
<td>88,384</td>
</tr>
<tr>
<td>SSCA</td>
<td>53,948</td>
<td>0.50</td>
<td>27,235</td>
</tr>
<tr>
<td>A1</td>
<td>321,531</td>
<td>0.68</td>
<td>219,655</td>
</tr>
<tr>
<td>A2</td>
<td>150,300</td>
<td>1.83</td>
<td>275,318</td>
</tr>
<tr>
<td>Peri-urban</td>
<td>7,214</td>
<td>0.80</td>
<td>5,768</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>1,584,158</strong></td>
<td><strong>0.57</strong></td>
<td><strong>907,628</strong></td>
</tr>
</tbody>
</table>

The maize grain yield for the communal farmers, who are the most vulnerable and constitute more than 70% of the rural population was reported at 0.33 metric tonnes/ hectare compared to 1.83 tonnes/ hectares by the A2 farmers (table 1). The low yield for the communal farmers is as a result of a combination of factors including the poor performance of the rainfall season and the inability of these farmers to acquire quality inputs due to financial constraints.

**Source**: 2020 Second Round Crop and Livestock Production

Maize grain for communal farmers is 28% below the 5yr average of 404,000 Mt (figure 2). The production function for communal farmers in Zimbabwe can be described to be subsistence best characterised by lack of adequate and quality inputs, lack of technology e.g. irrigation schemes to supplement the rainfall especially during prolonged mid-season dry spells and intensive labour dependant leading to the inability to cultivate larger land portions. As a result, most of the communal farmers are vulnerable and prone to food insecurity induced by the negative impacts of climate change in Zimbabwe.
The report also shows that most farmers produced cereals adequate to last a maximum of 3 months in 20% of the rural Zimbabwe or 12 districts which include Beitbridge, Bulilima, Chivi, Gwanda, Gweru, Mangwe, Matobo, Mberengwa, Mwenezi, Mutare, Tsholotsho and UMP (Figure 3). Some districts are perceived to have commencing harvesting in April and their current harvests will not take them beyond June. These districts which were prioritised by WFP to be part of those districts in need of urgent assistance as from July 2020. Income from other livelihood sources were found to be affected by both the outbreak of COVID-19 and economic challenges.

Figure 3: Cereal adequacy by districts

About 35% or 21 rural districts, highlighted in yellow in Figure 3, were estimated to produce cereal adequate to last between 4 to 6 months, bringing the total number of districts whose production would not last beyond December 2020, to 33 districts or 55% of the rural districts. This situation shows that without food assistance 20% of the districts would have run out of cereals as from August 2020.

Possible preliminary food balance sheet scenario
The country requires 2.6 million Mt of cereal for human consumption (2.2 million Mt), livestock and other uses (450,000 Mt). The total cereal production from the 2020 harvest was estimated at 1.1 million Mt leaving a gap of about 1.6 million Mt see table below.

<table>
<thead>
<tr>
<th>Requirements (MT)</th>
<th>Available Grain and Cereals (MT)</th>
<th>Surplus/ Deficit (MT)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Human</td>
<td>Maize</td>
<td>908,000</td>
</tr>
<tr>
<td>Livestock and other uses</td>
<td>Small Grain</td>
<td>152,000</td>
</tr>
<tr>
<td>Stocks @GMB (as @2 May 20)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>1,060,000</td>
<td>(1,580,000)</td>
</tr>
</tbody>
</table>

Source: 2020 Second Round Crop and Livestock Assessment Report
If all the cereal produced would be reserved for human consumption only, it would still leave a gap of about 1.1 million Mt, which would be imported.

Livestock Condition

Livestock conditions range from fair to poor across the country (2nd Round crop and livestock Report 2020). However, availability of grazing was reported to be critical and only lasting up to July in some districts mainly from Matabeleland North, Matabeleland South, southern districts of Midlands and Masvingo. As a result, livestock condition from those districts is likely to deteriorate if supplementary feeding is not provided timely. Drinking water for livestock is reported to be available in northern districts to last till the next rainfall season. However, in the southern districts the situation is different and water shortages are expected much earlier.

2. Update on the COVID-19 situation and impacts of food security

The number of COVID 19 cases continues to increase worldwide and is now estimated at 6.42 million. In Zimbabwe, the month of May saw a sharp increase in the number of cases from 31 cases reported at the end of April to 149 at the end of May 2020. The number have cases continued to rise into June to 265 as of the 5th of June 2020. Most of the cases were reported at quarantine centres across the country which host returnees from other countries. With the coming in of winter, the World Health Organization projected potential increase in the number of cases as was observed in other countries. Different models have placed the peak of the pandemic transmission in Zimbabwe to happen between July and August 2020.

The pandemic has increased exposure to economic shocks (mostly loss of livelihoods activities) especially for the most vulnerable in both rural and urban settings. Given the projections of an upsurge in the number of cases, the impacts of the pandemic on the livelihoods of the vulnerable populations will continue to be felt for a longer period. The main impacts of the outbreak on the household food security situation are summarised below:

- With the increase in the number of cases, vulnerable households in both rural and urban contexts are faced with poor hygiene and sanitation conditions with districts like Gokwe North (46%), Binga (35%), Gokwe South (33%), Kariba (31%), Epworth (21%), Chipinge (21%) and Chimanimani (21%) reporting prevalence above or close to that of the national average of 45% in rural context and 40% in urban context (ZimVAC, 2019). Any COVID outbreak in these areas is likely to spread faster if not contained immediately due to the poor sanitation and hygiene standards. This has a potential to impact negatively on the livelihoods and health conditions in these areas.

- Remittances, one of the most important sources of income for 13% of the households in rural and 7% for urban context, has been serious affected since disposals incomes for those remitting from the diaspora has dwindled due to loss of employment opportunities as a result of COVID-19. Physical food access has drastically reduced due to closure of rural and urban open eating places/informal kiosks and reduced operational time for formal shops as well as limited trade flows. Most of food retail in both rural and urban informal settlements take place in open markets, through kiosks or open market stalls using nonstandard units of measurement. These marketplaces are currently affected by the lockdown measures.
• The informal cross border trade plays a vital role in complementing commercial food imports given Zimbabwe’s dependency on imports. Informal trade feeds the informal markets and serves the most vulnerable populations who cannot afford the prices and standard units of sale practiced by the formal market. Historic information (Joint reports from FEWSNET and WFP) reveals that in deficit seasons the informal cross border trade can import into Zimbabwe several tens of tons of maize, rice, beans, etc. from neighboring countries (mainly SA, Zambia and Mozambique).

• At national level, the country has been a net importer of both food and non-food commodities and has started experiencing shortages and acute price increases of an average of 8% week on week. Households that rely on the market for basic food commodities are increasingly finding it difficult to access adequate food quantities.

3. **Macro-Economic Conditions Update**

The country continues to be faced with one of the worst economic crisis in its history and has been operating in an inflationary environment with the prices of food commodities increasing by more 144% since the start of the year and more than 980% compared to April 2019 (RBZ, 2020). The annual inflation was reported at 767% in April 2020 (**figure 4**). The households, as described above, are losing potential income due to the impact of COVID-19 and conditions to contain it, harsh economic conditions and some households usually convert part of their produce to cash income, a situation which might be difficult this year.

**Figure 4: Zimbabwe Inflation Trends (2019 – 2020)**

[Graph showing inflation trends from 2019 to 2020]

Source: RBZ, 2020

The official exchange rate between the ZWL and USD was fixed at 1USD: 25ZWL in March 2020 by the Reserve Bank of Zimbabwe. However, the Old Mutual Implied Rate points to a declining economic situation with the old mutual stock rate increasing by more than 100% from 1USD: ZWL59 at the start of the month to 1USD:ZWL123 at the end of the month. The parallel market rates increased by more than 42% from 1USD: ZWL50 at the start of the month to 1USD:ZWL71. This deteriorating macro-economic conditions points to eroded households purchasing power leading to deteriorating food security conditions.
4. **WFP Internal Food Security Update**

WFP conducted food insecurity projections to estimate the total number of people in need of external assistance for the period June 2020 to December 2021. The projections were based on the analysis of the impacts of three major shocks (the poor performance of the cropping season; economic challenges and impacts of COVID-19 pandemic as discussed above) that have increased the vulnerability levels and food and nutrition insecurity in the country. The methodology combined impacts of the identified shocks on food security situation in the country. This combined approach projected that for the rural context:- about **1.3 million** rural people (14%) are food insecure in June 2020; **3.7 million people** (38%) for the period July to Sept; **5.3 million people** (55%) for the period October to December 2020; For the urban context:- **3.3 million** people were considered food insecure from the 2.2 million people (33%) estimated by the 2019 Urban ZimVAC.

WFP also prioritise these beneficiaries using a methodology which borrows from Integrated Phase Classification (IPC) framework, Integrated Context Analysis (ICA) and district profiles. According to this methodology for rural context:- **2.9 million** people were projected to be in IPC 3 (Crisis) and 4 (Emergency) for the period July to September and **3.3 million** from October to December 2020. In the urban context about **0.5 million** people were projected to be ICA category D which is IPC 4 compatible and 1.7 million in ICA Category C which is IPC 3 (Crisis) compatible. WFP has adopted the estimations given supporting evidence validating the assumptions used. However, as new evidence becomes available the unit will continue refining the estimations until the ZimVAC findings are available.

**NB:** **ICA category D** – households in this category are chronically food insecure, including destitute and are a caseload for integrated resilience package for recovery while **ICA category C** – households in this category are seasonal food insecure, vulnerable to shocks without the capacity to cope. If not supported can slide downwards into complete destitution and negative coping strategies.

5. **Market Performance Update**

**Maize grain availability and price**

Maize grain availability increased marginally though gradually over the month of May from the less than 1% to almost 7% during the last week of May 2020. The increase in availability in the commodity is mainly attributed to the coming in of the harvest. Although harvest from the current production is not adequate to cover more than 6 months of the annual needs (2020 Second Round Crop and Livestock Report), households normally dispose a proportion of their harvest to purchase other essential food and non-food needs. The low availability is atypical of this time of the year mainly due to a number of reason which include i) the late harvest mainly expected in June; ii) slow movement of the commodity from surplus producing areas due to the outbreak of COVID-19 and measures to contain it and iii) low imports as a result of slow movement of commodities across borders and general economic challenges.

Although maize grain is also available on the informal market mainly through farmer to farmer sales, supplies remain low and are likely to improve with time. Maize meal the closest substitute for maize grain was more readily available but costs more than 100% the price of maize grain, making it more
difficult for vulnerable households to purchase adequate quantities.

Maize grain prices were mainly collected from a maximum of 8 districts who reported availability over the reporting month hence the averages are not representative of the whole country. However, the average price for the three districts decreased by 15% from ZWL 11.65/kg during the last week of April to ZWL 9.90/kg during the last week of May 2020 (Figure 5). In USD the commodity was selling at an average of $0.25/kg which is 42% lower than the $0.31/kg reported in April. The USD price is also 42% lower than the 2yr average of $0.31/kg. The decrease in the prices could be attributed to low demand for the commodity as households start to consume from own production and also due to economic challenges.

Maize meal availability and prices

The sale of maize meal continues to be decentralized to discourage large gatherings and at the same time reaching out to more households. The commodity was mainly sold on a door to door basis in both rural and urban context hence its availability on the formal market was reduced. However, more than 45% of the traders reported availability of unrefined maize meal. The commodity was more readily available in urban markets at an average of 48% over the month in comparison with an average of 43% of the rural markets.

The commodity sold at an average price of ZWL 21.50/kg during the last week of May 2020, an increase of 50% from the ZWL17.90/kg reported during the last week of April 2020 (Figure 6). Mobile money payments were charged at an average of ZWL 23.70/kg a price which is 10% higher than the bond notes average price.
The current bond notes price of ZWL 21.50/kg is 117% higher than the maize grain price of ZWL 9.90/kg. Considering the poor availability of maize grain, vulnerable households might find maize meal priced beyond their reach and fail to access adequate quantities, rendering them food insecure.

Highest maize meal price was reported in rural settings at an average of ZWL 21.70/kg for the fourth week of May which is 4% higher than the urban settings with an average of ZWL 20.80/kg for bond notes. As the commodity is a staple for the nation, the government continues to put measures in place to ensure constant availability of the commodity. The government also subsidizes the price for the local produced brands. The imported brands are usually more expensive compared to the locally produced brands.

### Sugar beans availability and prices

Sugar beans availability increased over the month of May from 42% reported during the first week of the month to 50% in the last week. The increase could mainly be attributed to the coming in of the harvest, a situation which is likely to continue into June 2020.

The commodity was selling at an average of ZWL 87.33/kg during the last week of April which is 36% higher than the ZWL 70.90/kg reported during the last week of April 2020 (figure 7). The same commodity was selling at an average of ZWL 98.70/kg for mobile money, a price which is 13% higher than that of bond notes. The average USD price of $2.15/kg remain stable in comparison to the 2-year average of $2.20/kg.
Vegetable Oil availability and prices

Vegetable oil was available in 86% of the surveyed markets a slight improvement to the 82% reported in April. The commodity was selling at an average bond note price of ZWL 83.20/L during the last week of May which is 14% higher than the ZWL73.20/L reported during the last week of April 2020 (figure 8). The commodity was selling at ZWL95.30/L for mobile money payments during the last week of May, a price which is 14% higher than that of bond notes.

Figure 8: Vegetable oil price trends

4. Recommendation

Among the key recommendations emanating from the analysis above include;

i. Scaling up of current food assistance levels with focus on strengthening the urban interventions.

ii. The ZimVAC to provide preliminary national food insecurity estimations to allow for planning and programming. Given the outbreak of COVID-19, face to face interviews are no longer the best methodology for collecting data, WFP and the UN family are offering the government alternative approach which includes a combination of remote data collection platforms and using secondary data. Remote monitoring is collects near real time data, is faster and cheaper. It would provide preliminary estimations for planning whilst awaiting the comprehensive and indepth ZimVAC data that will be collected once the conditions in the country allow. WFP’s mobile Vulnerability Analysis and Mapping (mVAM) initiative involves conducting mobile surveys through live telephone interviews. Through mVAM high-frequency
data is collected from households and key informants (e.g. traders). The initiative was piloted in 2013 and scaled up in 2014 to Guinea, Liberia, and Sierra Leone in support of WFP’s Ebola emergency response. Adoption of mVAM tools has been rapid, and the approach is now being used by WFP in over 40 countries, including in response to Level 3 emergencies. Since 2018, WFP has been implemented the mVAM remote monitoring systems to provide continuous updates on food security, nutrition and other key indicators in countries facing food crises. This system is are now active in 14 countries, with a plan to scale-up to 30 countries by the end of 2020. Mobile surveys are conducted through call-center based, live telephone interviews – also known as Computer Assisted Telephone Interviewing (CATI). WFP has contracted Mobile Accord Inc. (GeoPoll) under a Long-Term Agreement (LTA), alongside other regional and national call centers, to manage the calls using trained operators in local call-centers. Such outreach can also be conducted over short, text messages, but the response and completeness rates from text messages have been observed to be lower than those of voice calls. The findings of the preliminary assessment will be used in targeting assistance to Zimbabwe’s most vulnerable communities.

iii. WFP to continue monitoring the food security situation.