The 2019/20 rainfall season has been characterized by below normal rainfall which is poorly distributed. Some districts in the southern and western parts of the country reported severe crop wilting which can compromise the potential harvest. The country continue to experience economic challenges and price volatility which is leading to increased vulnerabilities for both the rural and urban communities.

Food insecurity is likely to deepen beyond the projected levels of 59% or 5.5 million of rural population and 30% or 2.2 million urban population, likewise the IPC severity has also increased as a result of the ongoing economic challenges, poor rainfall performance and the unavailability of income and food sources including casual labour.

Prices of basic food commodities increased by at least 400% from January to December 2019, against stagnant ZWL incomes of most of the Zimbabwean population. Households reported that they have exhausted their coping mechanisms that they usually resort to when faced with food shortages. Without external assistance, vulnerable households are likely to face difficulties in accessing adequate food.

The unit is planning for a reassessment of the situation to understand the number of people in urgent need of food assistance and the severity of the situation.
The 2019/20 rainfall season has been characterized by low and poorly distributed—both in time and in space—rainfall. Most parts of the country received below 85% of their long-term average rainfall (Figure 1). The Water Retention Satisfaction Index (WRSI), an indicator of crop performance based on the availability of water to the crop during a growing season, shows that most of the planned maize crop ranges from mediocre in the middle and western parts to poor/failure in the southern parts of the country (figure 2).

Field reports also show a low proportion of area planted in comparison to the 2018/19 season, a result of the late start of the season and poor access to cropping inputs, which are priced beyond the reach of many. Water sources are still dry and communities are walking longer distances to access clean water. Livestock condition is deteriorating with Chipinge, Mwenezi and Chiredzi reporting cattle poverty deaths due to unavailability of both grazing pasture and water.

Economic Conditions

The economic conditions in the country continued to deteriorate in December. High inflation rates, cash liquidity challenges, shortage of basic goods and services (fuel, electricity, health services and water) and unemployment characterize the economic environment. 71% of Zimbabwe’s population is estimated to be poor, with 29% living in extreme poverty (Zimbabwe Poverty Report, 2017). According to the World Bank, Real gross domestic product (GDP) is likely to have contracted by 7.5% in 2019.

Year-on-year inflation has reached 480% in November 2019, up from 440% in October 2019 and 57% in January 2019 (Reserve Bank of Zimbabwe, 2019). Meanwhile, month-on-month inflation saw some relief, slowing down from 39% in October to 18% in November. Annual food inflation has been estimated at 672% in November, up from 64% at the beginning of the year (figure 3).

The ZWL has been depreciated by almost 94% against stronger currencies from an exchange of ZWL1:1USD to ZWL16.77: 1USD at the end of 2019 (figure 4). This harsh economic conditions resulted in increased vulnerabilities for both the rural and urban communities, whom most of them are no longer able to meet their daily needs without external assistance.
The ZimVAC projected that about 5.5 million of the rural population (that is, almost 60% of the rural population) will be food insecure for the period January to March 2020, while 2.2 million people in urban settings are food insecure. Given the ongoing deterioration of the macro-economic environment together with the poor performance of the rainfall season, some of the assumptions used to project are likely to have been overly optimistic. An adjustment would result in even higher numbers of food insecure people.

The national rural IPC conducted in June 2019 projected that 3.5 million people were in phase 3 and 4 for the period October to December 2019. In the absence of an updated national IPC, WFP conducted an IPC compatible analysis for the period of January to April 2020 for planning purposes only. This update of the ZimVAC IPC took into consideration the impact of price increases on food access. The analysis estimated that about 4.1 million rural people would be in IPC phase 3 (Crisis) and 4 (Emergency) for the period January to April 2020 and in need of urgent food assistance. The analysis also classified ten rural districts (one in addition to the previous one) to be experiencing IPC phase 4 outcomes (figure 5). The government currently negotiates with members of the national VAC to update the national IPC for the period January to April 2020.

Maize grain availability and pricing

Over the month of December, maize grain was available in 9% of the markets monitored on average, down from 14% in November. This decline is due to the poor 2018/19 harvest and resembles a situation which is typical during the peak of the lean season. While it is a clear indication that it has become increasingly challenging for households to access maize grain, the numbers refer primarily to the formal market. However, maize grain is also traded in the informal market – directly between farmers or through mobile traders – potentially without being captured by the monitors.

Districts in which monitors have not been able to find any maize grain trader to interview in the formal market are shown in dark red colour in the maps (to distinguish them from those where traders in maize grain have been interviewed and stated a lack of availability).
Maize grain sold at an average of ZWL4.22/kg for bond notes and, with a 13% surcharge, at ZWL4.76/kg for mobile money payments. The December price for bond notes is 4% up from the November average price (Figure 6), with the highest prices recorded in Makoni (ZWL6.29/kg), Mberengwa (ZWL5.94/kg) and Zvishavane (ZWL5.90/kg). Over the course of 2019, maize grain prices have increased by more than 600%, up from the ZWL0.60/kg reported in January 2019.

Maize Meal availability and prices

Maize meal is a close substitute for maize grain and was reported available in an average of 66% of the markets monitored. In December, the commodity sold at an average price of ZWL8.02/kg for bond notes and 11% higher for mobile money payments at an average of ZWL8.91/kg. Maize meal prices increased by 24% relative to the ZWL6.47/kg reported in November are more than 745% up from the ZWL0.95/kg reported in January 2019. For December, highest maize meal bond notes prices were reported in Masvingo (ZWL14/kg), Nkayi (ZWL12.39/kg) and Chimanimani (ZWL11.06/kg). The current USD prices are more than stable and in line with their two- and five-year averages.

In the beginning of December, the government removed subsidies for the commodity, putting upward pressure on prices, but reinstated these again towards the end of the month (figure 7). Although maize meal is a close substitute for maize grain, it is priced about 90% higher and beyond the reach of many vulnerable communities (figure 7).

Sugar beans availability and prices

Sugar beans are the most commonly consumed source protein among vulnerable households. Availability dropped from 80% of the monitored markets in November to 60% in December. The commodity is also sold informally from vegetable gardens which could lead to low demand on the formal market at the start of the green harvest, hence the decreasing availability.

Sugar beans sold at an average price of ZWL32.30/kg for bond notes and 15% higher for mobile money at an average price of ZWL37.14/kg (figure 8). The December price was up by 33% from the ZWL24.30/kg reported in November and by more than 500% compared to the ZWL5.32 at the start of 2019 (Figure 8).

Maize grain prices in USD remained stable and in line with their two-year average.

Sugar beans price trends

Source: Harmonised markets monitoring
**Conclusion and Recommendation**

**Vegetable Oil availability and prices**

During the month of December the price of vegetable oil has been relatively stable from an average of ZWL29.90/L reported in November to the current ZWL30.09/L (**figure 9**).

During the festive season some traders reduced their prices for the commodity in line with the parallel market exchange rate. Vegetable oil was generally available in all the markets (100%).

More traders are reported accepting USD payments compared to the previous months. USD payments are stable when compared to the two-year and five-year and average at USD1.55/L in December.

**Figure 9: Vegetable oil price trends**

![Vegetable oil price trends](image)

**Conclusion**

- Given the high chances of another poor harvest as a result of poor rainfall patterns, availability of and access to food commodities, in particular cereals and pulses, can become increasingly challenging
- The economy has not shown signs of recovery and inflation and price increases are likely to continue into 2020, leading to increased vulnerabilities of both rural and urban communities.
- Food insecurity is likely to deepen beyond the projected levels of 59% or 5.5 million of rural population and 30% or 2.2 million urban population, likewise the IPC severity has also increased; given the ongoing economic challenges, poor rainfall performance and the unavailability of income and food sources which include casual labour.
- Income from livestock is low given the low quality as a result of poor grazing pastures.

**Recommendations**

- Reassess the estimates of food insecurity i.e. IPC severity (ongoing).
- Review prioritisation and targeting criteria to ensure assistance reaches those in most need (ongoing).
- Review markets and food security monitoring strategy (IPC 4 districts need more) - (ongoing).
- Regular updates on crop condition and other sources of livelihoods to enable refinement of the analysis of those in need for planning.