HIGHLIGHTS

► Private traders or retailers were the main source of cereals for the majority of households.
► The rise in demand for cereals on the markets was curtailed by the increase in food assistance programmes in November.
► Average maize grain prices on the markets have been on an upward trend. Prices remain high in the deficit areas.
► In Matabeleland North and South provinces staple grain was not readily available on the markets. However, maize meal was available but at high prices.
► Average cattle prices increased slightly in November. However, cattle condition was still reported as fair to poor across the monitored sites.
► There are high chances of normal to below normal rainfall for the drought-prone southern part of the country. This is likely to impact negatively on the food security situation.

CEREAL AVAILABILITY AND SOURCES

The majority of households (63%) in monitored sites were consuming cereal purchased from private traders and retailers in November, marginally down from October (64%). Own produced cereals were exhausted for most of the households. Secondary sources of cereal were farmer to farmer sales, food assistance and grain loan scheme (Figure 1).

Availability of staple cereal on the markets was variable across the provinces. In Mashonalnd Central province maize grain was unavailable on the markets in the Zambezi valley. The government’s Grain Loan Scheme was the main source of grain. In Mashonalnd East and West provinces as well as Midlands province, staple grain was sometimes available on the markets. In Manicaland province availability of staple cereal on the markets was good to fair. In the south western provinces of Matabeleland North and South, maize grain was largely unavailable. However, maize meal was more readily available.

Food assistance programmes such as WFP’s Safety Net and Seasonal Targeted Assistance (which provides beneficiary households with in-kind food or a combination of cash and in-kind food) as well as other Government programmes contributed significantly to household cereal availability in November. In 64% of the monitored sites, the majority of households had benefited from these programmes.

WFP implements a monthly Food Security Monitoring (FSM) system in 50 rural districts of Zimbabwe and a Bi-weekly Markets Monitoring system for rural and urban markets. The monthly system collects data from communities on cereal availability, access, livelihoods and coping strategies while the bi-weekly system collects data on cereal availability, traders, prices, sources and volumes of stocks and sales.

Data for the monthly monitoring system is collected from selected sites in each district. A site is a ward represented by one village in which focus group discussions with key informants are conducted. At most two sites are covered per district. A total of 91 rural sites were surveyed in both October and November. For the bi-weekly monitoring system, a site is a market place where cereals and other commodities are sold. In both October and November, a total of 28 urban and rural business centers were monitored. Key informant questionnaires are used to collect the data. Enumeration is done concurrently in all sites.
In some sites under WFP operational areas, beneficiary households were purchasing cereals using cash received under the programme.

Figure 1 show that the contribution of food aid distributed by NGOs has gradually been increasing (4% of sites in October to 9% in November) while that of the Government’s Grain Loan Scheme has been gradually declining (17% in October compared to 8% in November).

DEMAND AND SUPPLY OF MAIZE GRAIN ON THE MARKETS

Since June, volumes of sales gradually increased in both rural and urban markets reaching a seasonal peak during the 2nd week of October (Figure 2). Sales dipped during the 1st week of November. This could be due to the effect of increasing food assistance programmes.

Average volumes of maize grain followed the same trend. Volumes gradually increased as demand rose but declined during the 1st week of November.

MAIZE PRICES ON THE MARKETS

Average maize grain prices in monitored rural sites increased slightly by 7% in November as compared to October in the grain deficit areas. The November average was $0.37 per kilogram. Prices in deficit areas have consistently been higher than those in surplus areas (Figure 3). For sites in the surplus areas, the average price of maize grain has been on an upward trend since September averaging $0.32 in November. This marked a 15% increase from the September average. This trend indicates increasing demand of the commodity and dwindling supplies on the markets.
The prices of unrefined maize meal went up from a range of $0.44 to $0.60 in September to a range of $0.50 to $0.62 per kilogram in November. These prices were way above those of maize grain. For most areas in the southern provinces of Matabeleland North and South where only maize meal is available on the markets, household access to food was compromised.

In urban monitored sites maize grain prices increased in the range 9% to 20% in November compared to September were noted in Masvingo, Mutare and Gweru (Figure 4). In Harare the price remained stable while in Bulawayo the average price decreased by 8%. The average price of maize grain in the major cities was $0.32 in November.

### LIVESTOCK PRICES

Although cattle condition was still being reported as fair to poor in the southern provinces, the average price of a beast in November went up to the same level it attained in September of $297 up from $280 in October (Figure 5). Early rains could have improved pastures in some areas resulting in some improvements in cattle condition. The prices were variable across monitored sites, ranging from $100 to $500. Goat prices remained relatively stable recording an average of $30 per beast. No significant changes in goat prices were observed since the beginning of the year.

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Table 1: Average rural maize grain prices by province – November 2012

<table>
<thead>
<tr>
<th>Province</th>
<th>Minimum</th>
<th>Maximum</th>
<th>Average Nov 2012</th>
<th>Average Nov 2011</th>
<th>% change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manicaland</td>
<td>0.23</td>
<td>0.46</td>
<td>0.33</td>
<td>0.34</td>
<td>-3</td>
</tr>
<tr>
<td>Mash Central</td>
<td>0.23</td>
<td>0.46</td>
<td>0.32</td>
<td>0.30</td>
<td>8</td>
</tr>
<tr>
<td>Mash East</td>
<td>0.29</td>
<td>0.40</td>
<td>0.35</td>
<td>0.35</td>
<td>0</td>
</tr>
<tr>
<td>Mash West</td>
<td>0.23</td>
<td>0.34</td>
<td>0.27</td>
<td>0.21</td>
<td>31</td>
</tr>
<tr>
<td>Masvingo</td>
<td>0.34</td>
<td>0.57</td>
<td>0.40</td>
<td>0.42</td>
<td>-5</td>
</tr>
<tr>
<td>Mat North</td>
<td>0.29</td>
<td>0.57</td>
<td>0.40</td>
<td>0.42</td>
<td>-5</td>
</tr>
<tr>
<td>Mat South</td>
<td>0.46</td>
<td>0.46</td>
<td>0.46</td>
<td>0.40</td>
<td>14</td>
</tr>
<tr>
<td>Midlands</td>
<td>0.23</td>
<td>0.51</td>
<td>0.35</td>
<td>0.34</td>
<td>3</td>
</tr>
<tr>
<td>All</td>
<td>0.29</td>
<td>0.57</td>
<td>0.34</td>
<td>0.36</td>
<td>-6</td>
</tr>
</tbody>
</table>

Table 1 shows that at regional level, average maize grain prices in the southern provinces of Matabeleland North and South and Masvingo remained high in the range of $0.40 to $0.46 per kilogram in November.

In the rest of the provinces, average maize grain price in November ranged from $0.27 to $0.35 per kilogram. The least price was recorded in Mashonaland West province. Low as it may have been, the price reflected a 31% increase compared to the same month the previous year.

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Figure 4: Average maize grain prices in urban areas

Figure 5: Average cattle prices
AGRICULTURAL SEASON UPDATE

The Meteorological Services Department (ZMSD) reported that the rainy season had not started in most areas as of the last dekad of November. Approximately 20% of the country had received rainfall that was in the normal category for that time of the year whilst the bulk had received below normal rainfall (Rainfall Bulletin Issue 5 – 28 Nov 2012).

The forecast (Figure 6) indicates that most parts of northern Zimbabwe are likely to experience normal rainfall with a tendency towards above normal. However, the southern areas are likely to experience normal rainfall with a slight tendency towards below normal. This has a negative impact on food security as below normal rainfall leads to prolonged dry spells resulting in poor crop production, water shortages and other challenges such as poor pastures.

CONCLUSION

- Cereal availability on the markets was generally good.
- Average maize grain prices were on an upward trend in both rural and urban areas. In the former, prices have consistently been higher in the grain deficit than the surplus areas.
- Access to food for poor and vulnerable households in Matabeleland provinces compounded by high prices of cereals, mainly maize meal.
- No major improvements in cattle condition.
- Start of the rainfall season has been late and this has a negative impact on agricultural activities.

Figure 6: 2012-13 Rainfall season forecast (ZMSD)