Zimbabwe Monthly Food Security Monitoring Report

March 2017
1. Introduction:
This report updates the food security situation of rural livelihoods in Zimbabwe for March. The analysis is based on secondary data, Focus Group Discussion (FGDs) findings, markets interviews, and telephone interviews with traders.

2. Major Highlights
- The food security situation remains stable, thanks to adequate food assistance coupled with the early harvest of green vegetables.
- Crop conditions remain good in most parts of the country with few districts already harvesting the early planted crop.
- Some communities still engage in negative coping strategies despite the prospects of a good harvest.
- National average maize grain prices rose above those observed in February 2017 (8%) and January 2016 (3%).
- Cattle prices increased significantly due to improved body condition associated with availability and quality of grazing and pasture, resulting in improvement of terms of trade for livestock owners.
- On farm casual labour is still the major source of income.
- Increasing cash shortage across the country, mobile money agents continue limiting cashing-out services.

3. Food and Nutrition Security Situation
3.1 The 2016/17 Agricultural Season
The good rains in most areas have facilitated significant improvements in the status of food crops, pasture conditions and drinking water availability for livestock resulting in improvement of the overall agricultural production (crop and animal production) in most parts of the country.

An outbreak of fall armyworm, a new pest in the SADC Region, was reported in most parts of the country. According to the UN’s Food and Agriculture Organization, which held an emergency meeting on the pest in Harare in February 2017, up to 130,000 hectares of staple crops (especially maize) were affected (February 2017). The excessive rains induced by Cyclone Dineo affected operations to combat the armyworm attack by washing away the chemicals. While chances of a good harvest are high, crop yields will be greatly reduced by the fall armyworm attack. The Government declared a state of disaster on 2 March 2017 following the impact of the floods, which left an estimated 2 000 people homeless, while infrastructure damage was also reported; the most affected districts were in Matabeleland North. With weather forecasts indicating a continuation of above-average rains until May, there is a risk of further flooding (FAO GIEWS, March 2017).

An analysis of the Water Requirements Satisfaction Index (WRSI) by FEWSNET, a model that indicates the extent to which crops have received the water they require during the season, suggests that cereal crops grown in the southern parts of the region have received adequate water (green areas, Figure 1). The higher than average WRSI in these areas gives hope for good harvest prospects this season. The SADC Climate Services Centre (CSC) through it’s February-March-April (FMA) 2017 outlook update report predicted above normal rainfall across the country.
According to ZINWA as of February 27, the national average dam level stood at 71.5%, up from 65.5% the previous month. The majority of the major dams monitored by ZINWA were full and spilling. The increasing number of spilling dams raised the risk of flooding in areas downstream. The filling up of most dams in the country marks the end of the multiyear hydrological droughts the country has experienced – a favorable condition for irrigated crop production.

### 3.2 Food Availability

There was a slight increase in the number of monitored markets reporting (69%) cereal availability compared to February 2017 (64%). The availability of cereals and other crops is expected to improve even further as more harvests come in. The national availability outlook for staple cereals (maize, millets, and sorghum) for the 20016/17 marketing year depicts an improvement in availability compared to last year due to the good rains. The key determinants of household food security will be sub-national grain availability, market grain flows, and the ability of households with deficits to purchase sufficient food on local markets. Data from the ZIMSTAT indicate that during the period of March 2017 the government imported 88,067 MT of cereals. As of 30 March 2017, the Grain Marketing Board had a total of 204,138 MT of maize grain (white and yellow) and 9,934 MT of small grains for both human and animal consumption. Given this carryover stock combined with a good agricultural season, there might not be a significant food gap this marketing year.

The following are the summary findings from the markets monitoring:

- Maize grain was reported to be readily available in 69% of the markets monitored compared to 64% in February 2017.
- Availability of unrefined maize meal remains stable with tendency to improve, with 85% of markets reporting availability in March 2017 compared to 83% of markets in the previous month.
- Rice was reported to be available in all markets.
- Small grain availability continued to decline as evidenced by a drop in traders (12%) reporting availability from 33% registered in February 2017.
- Other commodities like sugar beans and cooking oil were reported to be available in 40% and 64% of the traders visited respectively.

The country continues to import maize grain and maize meal from neighboring countries, mainly from Zambia and South Africa. The SADC Logistics Unit reported an import of 83,694 tonnes of white maize from South Africa as of week 9 (27 February – 5 March 2017). Also 81,776 tonnes of yellow maize grain were imported into the country (figure 3).
3.3 Food Access

The ZimVAC 2017 Rapid Assessment conducted in January 2017 highlighted that households were still facing challenges in accessing food, mainly cereals and consequently recommended a 2-months extension of the lean season assistance i.e. until May 2017 when most households are expected to have started harvesting. During the FGDs it was reported that most households were still engaging in negative coping strategies such as reduction of portion size consumed and reduction of number of meals eaten per day. Besides challenges in accessing cereals, households have continued to consume green mealies and other crops like pumpkins and various types of vegetables compared to the last reporting period and this has gradually contributed to improved access to diversified foods. However, communities continue to report food assistance and Government Grain Loan Scheme as their main sources of cereals.

The main reported sources of income include vegetable sales (26% of households) and trading of small livestock mainly goats and chickens in exchange for cereals at an average of 6kg per chicken and $32 or 50kg bag of maize for a goat. Households were reported to be increasingly engaging in barter trade to avert cash shortages. Casual labour was also reported as a main source of income or cereals at an average of $2 a day or a bucket (17.5kg) of maize grain per week.

- The current national average maize grain prices of $0.39/kg are 8% higher than February 2017 at an average of $0.36/kg and 3% higher than January 2017 at an average of 0.38/kg. There was a slight drop in the price in February 2017 (Figure 5) and this slight change could be as a result of changing source – markets and reduced demand given that some households have access now to different sources such as food aid which accounted for 58% of the sources of maize grain and other food green foods from the fields.

- The current maize grain prices of $0.37/kg are 13% lower compared to those of the same time last year i.e. March 2016 with an average price of $0.45/kg. There was no major difference in the price of maize grain in March 2016 compared to both the 2yr average and 5y averages of $0.39/kg and $0.37/kg respectively (figure 4).

Source: FEWSNET

- If all the economic and political conditions remains stable, the national average maize grain prices are projected to remain relatively stable until the end of the consumption period in April 2017 at an average price of $0.40/kg. Prices are also projected to be lower than the 2-year and 5-year averages in the next consumption year (figure 5).
National average maize meal prices of $0.60/kg have been relatively stable over the consumption period. High competition among millers, maize meal import flows from South Africa to southern districts, and the weakening of the South African Rand are some of the factors that contributed towards the stability of the maize meal prices. The national average maize meal price of $0.60/kg is statistically similar to the 2yr ($0.60/kg) and 5yr ($0.61/kg) averages.

The average maize grain prices for the southern parts of the country continued to be higher compared to the northern parts. Higher maize grain prices were recorded in Beitbridge, Gwanda, Bulilima, Mangwe, Matobo, Insiza, and Umzingwane with an average price above $0.55/kg. These are low producing maize grain areas, thus poor supply of the maize grain have led to higher prices. Unlike in the southern parts of the country, the lowest prices were recorded in Mashonaland and Midlands provinces with as low as $0.28/kg. The southern districts are likely to receive their harvest much later than the northern districts as they started planting much later.

High maize meal prices were consistent with the areas showing higher prices of maize grain. Chimanimani and Mbire had the highest average prices of $0.70/kg. These prices are 14% higher compared to the national average of $0.60/kg. The lowest maize meal prices were recorded in Makonde at an average of $0.49/kg (figure 6).

The average price of sugar beans was $2.13/kg ranging from $1.25/kg to about $3.50/kg and the average price of cooking oil was $1.83/L with a price range from about $1.50/L to about $1.87/L.
• Livestock condition was reported to be improving and ranging from fair to good as a result of improved pasture availability and quality due to the rainfall received across the country.

• Cattle were reported to be selling at an average price of $366/beast with a price range from $200.00 to $575.00. Goats were reported to be selling at an average price of $32.30 increase of 23% compared to the last reporting period (February 2017) with an average of US$25/goat and indigenous chickens at an average of $5.26.

3.4 Sources of Income

<table>
<thead>
<tr>
<th>Source</th>
<th>Percentage</th>
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</thead>
<tbody>
<tr>
<td>Gardening</td>
<td>8%</td>
</tr>
<tr>
<td>Fetching Firewood</td>
<td>8%</td>
</tr>
<tr>
<td>Thatching Grass</td>
<td>8%</td>
</tr>
<tr>
<td>Fencing</td>
<td>8%</td>
</tr>
<tr>
<td>Other</td>
<td>11%</td>
</tr>
<tr>
<td>Ploughing</td>
<td>11%</td>
</tr>
<tr>
<td>Building</td>
<td>14%</td>
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<tr>
<td>Harvesting</td>
<td>19%</td>
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<tr>
<td>Weeding</td>
<td>72%</td>
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</tbody>
</table>

Expectedly, casual labour was reported to be the main source of income for households. The main casual labour opportunities include weeding (71%), and harvesting (19%). Other forms of on-farm casual labour were being practiced by the farmers such as ploughing (11%), fencing of plots (8%) and gardening (8%). Other livelihood coping mechanism such as fetching firewood (8%), thatching grass (8%) and building were mentioned as other sources of income. Since casual labour is dependent on agriculture performance, in a good year – which is the case of this season – this source of income improves as demonstrated by these findings, corroborated/backed up by ZIMVAC analysis.

4. Economic Analysis

The poverty datum line (PDL) represents the cost of a given standard of living that must be attained if a person is deemed not to be poor. 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. According to ZIMSTAT the food poverty line (FPL) as at February 2017 stood at $32.87. The poverty threshold, poverty limit or poverty line is the minimum level of income deemed adequate in a particular country. This means that the minimum needs basket costs $32.87 per person in February 2017 in Zimbabwe. This represents an increase of 3.4 percent over the January 2017 figure of $31.79. The February 2017 FPL for an average of five persons in Zimbabwe stood at $164.33. This represented an increase of 3.4 percent when compared to the January 2017 figure of $158.93. The Total Consumption Poverty Line (TCPL) for Zimbabwe stood at $99.75 per person in February 2017. This means that an individual required that much to purchase both non-food and food items as at February 2017 in order not to be deemed poor. This represents an increase of 3.40 percent when compared to the January 2017 figure of $96.47.

5. Conclusions

• Although the food security situation has improved slightly, most households are still not able to meet their food needs until the next harvest expected in May 2017.

• Cereal prices have remained relatively stable, and they have begun to decrease slightly and this might be because of the expected good harvest.

• Livestock terms of trade are improving in tandem with improved availability of grazing, pastures and water.

• Communities downstream of the flooded dams should ensure that all irrigation equipment in the rivers is secured or removed to avoid damage or loss.