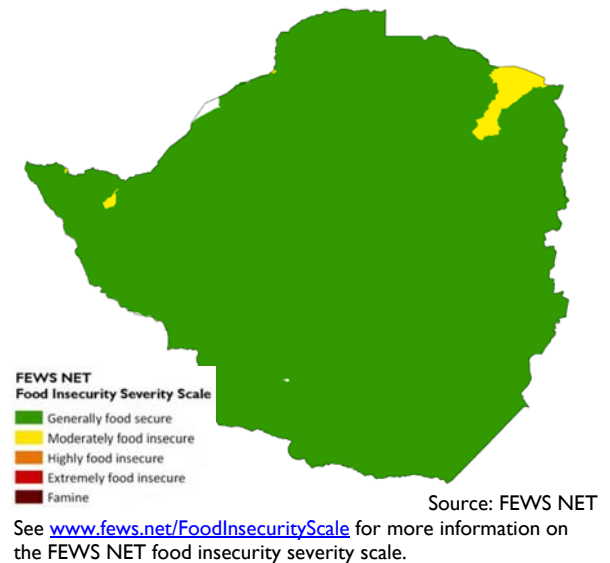


ZIMBABWE Food Security Update

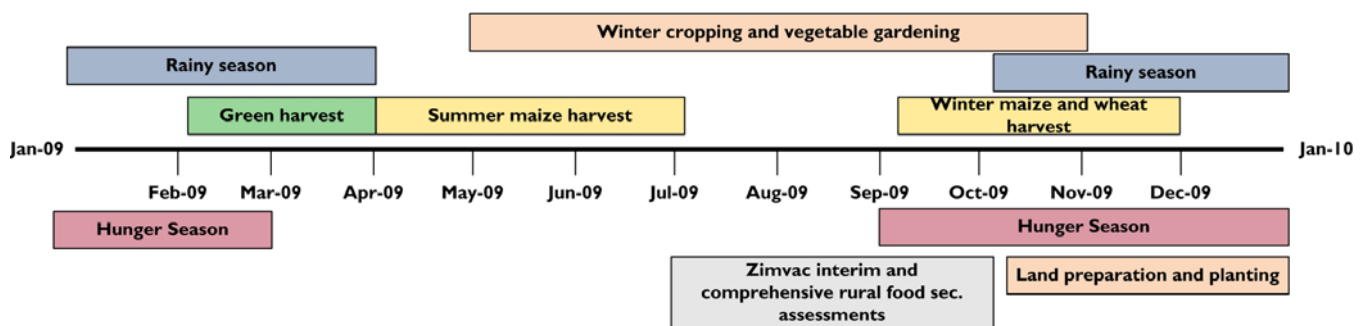
May 2009

- With the arrival of 2008/09 harvests and continued imports by private traders, food security in Zimbabwe is improving. However, 2008/09 harvests are unlikely to completely cover national cereal requirements, and the Ministry of Agriculture's (MOA's) April Second Round Crop and Livestock Assessment estimated a national cereal deficit of 690,000 MT.
- It is anticipated that efficient and effective redistribution of domestic production and cereal imports from within the region and from international humanitarian organizations will cover this cereal gap.
- Prices of most basic foodstuffs continue to decline, though they remain beyond the reach of most urban poor households, and April monthly allowances paid to civil servants remained about 77 percent below the cost of the minimum family basket.
- Though area planted to maize in 2008/09 dropped compared to last season, maize harvests are higher this year, but lower than the long-term (10-year) average. The April MOA assessment estimated maize production at 1,240,000 MT, about 160 percent more than last year's production. April Zimbabwe Vulnerability Assessment Committee (ZimVac) rural assessment findings indicate most households have enough harvests to last for four to six months.
- Input shortages and associated high costs are likely to lead to a below-normal 2009 winter wheat season, for which harvests are expected in September/October.

Figure I. Current estimated food security conditions, April – June 2009



Seasonal calendar and critical events timeline



Source: FEWS NET

Food security overview

National cereal availability

In line with FEWS NET's Food Security Outlook for Zimbabwe for April through September, food security in the country continued to improve in May, due to increased food availability from the 2008/09 harvest and private sector food imports.

The MOA's second round assessment in April indicated that current harvests are better than last year's. Combined maize, sorghum, and millet production estimates were recorded at 1,510,000 MT, against an estimated national requirement of

2,200,000 MT. These estimates leave a projected national deficit of about 690,000 MT (Table 1). VAC assessment results indicate that the greatest cereal deficits occurred in communal production areas, while most smallholder and large commercial areas are expected to have surpluses. Given anticipated levels of cereal production, it will be important for the Government of Zimbabwe and other stakeholders to facilitate efficient and effective redistribution of domestic and imported cereals.

Food security at the sub-national level

Rural food security

Generally, availability of maize and small grains has improved in rural areas, given better harvests experienced in most parts of the country this year. Agriculture and food security joint monitoring by FAO, FEWS NET, and Agritex noted that, in April, major sources of maize grain for most households were their own production, followed by purchases. Food aid was no longer a dominant source of food in April, as these programs scaled back in March, according to their normal cycle. Only feeding programs targeting orphans, the elderly, vulnerable mobile populations, and the chronically ill remain.

Though purchases were highlighted as another way of sourcing food in rural areas, cash transactions are minimal given limited income-generating opportunities and access to foreign currency. As there is little forex circulating in these areas, barter trade has become common, with farmers exchanging their products – including sweet potatoes, maize grain, and small grains – for services such as hospital care, milling, and schooling. Such transactions are a relatively new phenomenon in rural areas, brought about by the dollarization of the economy. It is worrying that if this barter process continues, which it is likely to do given limited income sources in these areas, farmers are likely to run out of food stocks as early as August.

Urban food security

Market availability of basic commodities is improving in urban areas as individuals and private traders continue importing food and non-food items, and as urban households consume food from their own harvests. However, food access for poor urban households who rely on purchases remains a significant challenge, as these populations frequently do not have access to foreign currency. Most poor urban households cope with this lack of resources by purchasing small amounts of food on a daily basis as cash becomes available. Others rely on casual labour to support their families.

With continued harvests and generally available market supplies of maize meal, prices for maize grain across the country have declined. At markets in Harare, Bulawayo, and Mutare, maize grain prices dropped by 40 to 50 percent between January and May 2009 (Figure 2). Selling prices in Mutare market remain the highest, at USD 0.86/kg in March and USD 0.34/kg in May. Most households in urban areas are currently consuming cereals from their own production, which is likely to cover their needs until September. If imports of basic goods continue, the biggest food security challenge for households

Table 1. 2008/09 cereal production compared to the national requirement, in MT

Maize, sorghum and millet production		1 510 000
Requirements	Human*	1 850 000
	Livestock and other uses	350 000
	Total	2 200 000
Surplus/deficit		(690 000)

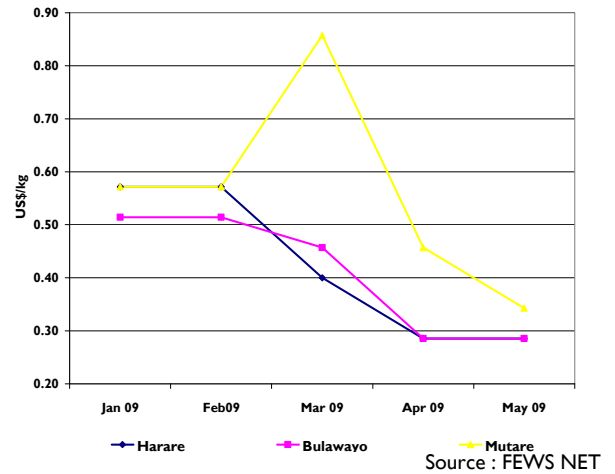
* Human consumption is computed from a consumption rate of 150kg/year, using a national population estimate of 12,230,607.

Source: MOA

in urban areas will be access, since it is difficult to receive or generate foreign currency, and income-generating activities are minimal. As such, poor urban households tend to engage in casual labor, for which they are paid in cash or in kind, procuring necessities daily.

Civil servants, who constitute the largest proportion of the formally employed population, have been receiving an allowance of USD 100 since February. If prices were not as high as they are, this allowance would enable this population to cover their basic food and non-food requirements. According to price monitoring done by the Consumer Council of Zimbabwe (CCZ), however, as of April, this allowance covered only about 23 percent of the family basket. The cost of the CCZ basket, which includes food and non-food items, increased to USD 427.11 in April, from USD 396.22 in March. Though prices for all commodities remain high, the April price increase for the basket was mainly due to increases in housing rental costs. Supplies of basic goods have improved, with most forex shops fully stocked, though prices of these goods remain beyond the reach of the majority of the population.

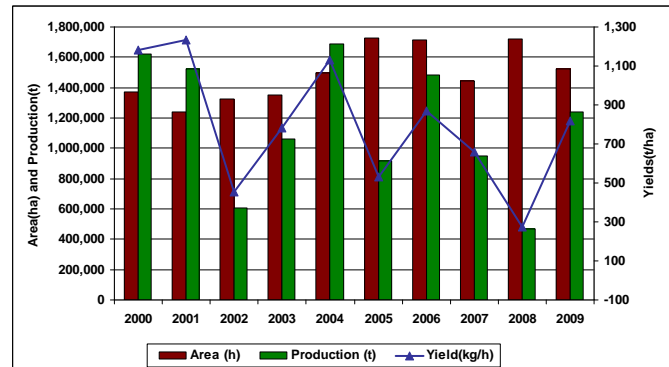
Figure 2. Maize grain price trends in Harare, Bulawayo, and Mutare from January 2009 to present



Seasonal progress

Summer season harvests are underway, with some farmers who planted early having already completed harvesting. Given serious maize seed access challenges and shortages of fertilizers, some smallholder farmers resorted to planting year-old commercial seed and/or grain meant for consumption (from the previous harvest and/or from food aid programs). While the Southern African Development Community (SADC) and several Non-Governmental Organizations (NGOs) provided some farmers with seeds and fertilizer inputs, SADC inputs came as late as January. These input challenges resulted in a 14 percent reduction in area planted to maize compared to last season.

Figure 3. Maize production in 2008/09 compared to 2000 - 2008 production figures



Though area planted to maize dropped, better harvests were realized this year compared to last year, however these harvests remain lower than the long-term (10-year) average. The MOA’s April assessment estimated maize production at 1,240,000 MT, from a planted area of 1,522,000 hectares, with an average yield of 0.8 MT per hectare (Figure 3). This production estimate is about 160 percent more than last year’s production, which was estimated at about 470,000 MT. Compared to average maize production for the past five years, 2008/09 maize production is about 13 percent higher. Small grain (sorghum and finger and pearl millet) production is estimated at 270,000 MT, about 190 percent more than last year’s harvest and about 110 percent more than the five-year national production average.

The ZimVac April interim assessment results also indicate significant improvements in household cereal harvests this year compared to last year, with most households in Chipinge and Bindura districts estimated to have produced enough cereals to cover 10 – 12 months of their cereal needs. However, most households in marginal production areas, including Mudzi, UMP, Rushinga, Mutoko, Nyanga, and Mudzi districts, produced only enough cereal to cover one to three months of household requirements. The ZimVac assessment also noted that the most common income sources available to households across all districts in the 2009/10 consumption year will be similar to those for previous consumption years: casual labour, market gardening, sale of livestock, sale of non-food crops such as tobacco and cotton, gold panning, and remittances. This last income source was most pronounced in districts closer to the borders.

In a ZimVac urban assessment conducted in January, it was noted that the area planted to maize by urban households had increased from last year and that these crops performed better this year. About 56 percent of households interviewed during this assessment noted that they were growing maize, and they expected their harvest to cover about six months of cereal requirements. This is roughly in line with urban assessment results from previous ZimVacs, such as that undertaken in 2006, when average household maize production in urban areas provided about four months of cereals, with some households producing a supply of up to eight months.

Winter wheat prospects

Winter wheat prospects this season are anticipated to be below normal, as, by mid-May, farmers had not yet secured all needed inputs. Land preparation this season was slow and at a much smaller scale compared to last season, due to a shortage in availability of and funding for inputs including fuel, seed, and fertilizers. Other limitations to wheat production this season included power cuts and low profitability of wheat production due in part to decreasing international prices for the commodity. The beginning of May showed favorable weather conditions for the start of the winter cropping season, but because of the lack of inputs, few farmers will benefit from this. Given the poor start of the winter cropping season, a significant reduction in area planted to wheat and wheat yields is likely. With the current status of this crop, it is estimated that the country will need to import more than 350,000 MT of wheat to meet the national requirement of about 400,000 MT.



Maize grain, maize flour, and cooking oil represent the most important food commodities consumed by poor households. The Mbare market in Harare is where a very large percentage of the most vulnerable households procure their basic commodities.

Monthly prices are supplied by FEWS NET enumerators, local government agencies, market information systems, UN agencies, NGOs, and other network and private sector partners.

