ZIMBABWE FOOD SECURITY OUTLOOK, January-March 2014

23 January 2014
Overview of the food security

January to March is the peak hunger season of the 2013-14 consumption year when 2.2 million people (or 25 percent of the rural population) would be food insecure by the end of the quarter of which WFP is targeting 1.8 million people (Figure 1).

- At peak in March 2014, the highest prevalence of rural food insecurity is projected in the southern and western half of the country. Matebeleland North Province will lead at 40%, followed by Masvingo Province (33%), Matebeleland South (32%) and Midlands Province (31%).
- Of the top 10 food insecure districts with 40% rural food insecurity and above at peak, eight (8) are in these four provinces.
- Between January and March 2014, household food access is expected to increase with anticipated expansion in the coverage of food and cash assistance programs. As a result of assistance, Minimal (IPC Phase 1!) and Stressed (IPC Phase 2!) outcomes are expected to continue in parts of the south and west.

Figure 1: Rural Food Insecurity in Zimbabwe 2013-2014 Consumption Year

Household food consumption and coping strategies

Preliminary findings from the bi-annual Community and Household survey conducted in December indicate that the food security situation has deteriorated for both beneficiary and non-beneficiary groups. The survey shows that only 64 percent of beneficiary households had acceptable consumption in December 2013 as compared to 85 percent in March 2013. This is the worst food insecurity level since March 2009. Anecdotal field reports indicate that for many households cereal rations are lasting less than a week and rarely beyond two weeks. There are also reports of sharing of commodities despite the reduced ration sizes as beneficiary households assist others not in the programme.

WFP Food Security Monitoring (FSM) conducted in December has established that household cereal stocks depleted faster and nearly 80 percent of monitored sites started relying on market supplies as early as November compared to about 65 percent in November 2012.

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Consequently, households are engaging in more severe coping strategies than before. About 37 percent of communities in FSM sites reported increased reliance on casual labour for food compared to 28 percent in December 2012. This is likely to reduce the time food insecure households will dedicate to their own farms and compromise their ability to produce enough food for the next season. In addition, more households are reducing the frequency and portion size of their meals and sale of livestock to meet food needs is also on the rise.

FSM further reveals that in December 2013, just 17 percent of sites indicated that food assistance (both WFP and government) was a major source of cereal compared to 27 percent in December 2012. This is an indication of the likely impact reduction of food WFP rations as well as reduced Government cereal distribution programme.

Low National Food Availability

This food security situation comes against the backdrop of poor cereal production in 2013 estimated at 798,500 Mt compared to national cereal requirement of 2.2 million metric tonnes (Figure 2). This relative scarcity, compounded by a paltry 6% Strategic Grain Reserve stock, has continued to drive cereal prices throughout the country.

Poor Economic performance

The economy is in a general state of disinflation due to tight liquidity and declining effective demand. The year-on-year inflation was estimated at 0.33 percent compared to 2.5 percent in January (Figure 3). The weakening of ZAR against the dollar has diminished the level of remittances to Zimbabwe which accounts for about 60 percent of all remittances sent from South Africa to the SADC region. This will affect communities in the southern districts in the Matebeland and Masvingo provinces where remittances are a significant source of livelihoods and incomes and also happens to register the highest food prices.

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2 The Government’s Strategic Grain Reserve (SGR) are reportedly very low on stocks, just around 30,000Mt compared to the 500,000Mt of maize required. The Grain Marketing Board was only allocated $96 million to boost the SGR against a requested $355 million.
High Food Prices
Average rural maize grain prices for December 2013 ($0.52/kg) were 13% higher than in November 2013 ($0.46/kg) and 21% higher than same time December 2012 ($0.35/kg). The recent move by the Grain Marketing Board to increase its cereal grain prices by 56 percent from $16 to $25/50 Kg bag is likely to further increase the price of both maize grain and maize meal unless the planned Government cereal imports of 150,000 Mt from South Africa materializes.

At the household level the purchasing power of livestock keepers has reduced by 17 percent (despite the improving livestock prices) and 50 percent for agricultural labourers compared to December 2012 (Figures 4 and 5). The highest prices are recorded in Mashonaland Central and Matabeleland North and South as well as Midlands.

The high and increasing cereal prices is a concern because households are spending over 50 percent on food and specifically 24 percent on cereals.

These trends severely undermine households’ ability to meet their food needs as households prioritise belly-filling over quality and diet diversity and cut down on other crucial basic household expenses on health and education.

The food security outlook January-March 2014

1) Performance of the 2013-14 rainfall season
   - The food security outlook until March 2014 largely hinges on the performance of the rains during January to March which is predicted to be normal to below normal in Southern districts and normal to above in the northern half.
   - The general rainfall performance so far is better than last year. However, the northern districts of Mashonaland and in the south in Matebeleland South and Masvingo Provinces have received late rains as late as mid-January and some communities were still planting or replanting maize. The effect of these delays on crop performance would be ascertained through the first and second round crop and livestock assessment conducted in January-February and March-April respectively.
   - It is anticipated that livestock condition and prices will continue to improve as well. However, it is noteworthy that most vulnerable households have reduced livestock heads significantly due to successive years of distress disposal.
2) **Crop input situation in the first quarter of 2014:**

- Despite the efforts Government and development partners to provide inputs, significant shortages of fertiliser notably top dressing ammonium nitrate still occur⁴ and field observations from nearly all provinces report occurrence of nitrogen deficiency in crops.
- The price of fertilisers has increased to about $40 per 50kg bag and this reduce access and use of fertiliser in areas not reached by input supply programmes of Government and development partners.

3) **Other factors likely to contribute to low cereal (but mainly maize) production:**

- As of January 2014, the GMB owed farmers over $6.1 million for grain deliveries. This has the potential of discouraging farmers from continuing with maize production.
- A significant proportion of farmers have moved into tobacco farming for the first time. The Tobacco Industry and Marketing Board has reported that as of mid-January 2014, some 85,076 farmers had registered to grow tobacco for the 2013-14 production season, 30% up from 65,265 same time last year. Tobacco has continued to be lucrative and attractive for farmers. Uptake of the crop has been reported even in traditionally non-tobacco growing areas such as Mbire District in Mashonaland Central Province. While, high tobacco production, estimated at 200,000Mt for the year (Tobacco Industry and Marketing Board and others), will result in increased incomes in the short-term, it could adversely cereal production and undermine food security. An analysis is underway to determine how the increased tobacco cultivation could impact on food security.

4) **Cereal imports:**

- Cereal availability in the country is projected to improve if the reported Government plans to import a further 150,000Mt of maize grain from South Africa succeed⁵. Media reports indicate that this grain will be prioritised for the southern provinces in the country which happen to be the most food insecure. The grain will be sold through the GMB, with 10% reserved for free distributions to vulnerable groups such as child headed households and the elderly.
- However, Government capacity to pay for the South African imports remains in question. Cereal availability on the South African market is also said to be subdued following a poor rainy season last cropping year which resulted in a 20% drop in maize production compared to the previous year, the lowest since 2007⁶. Besides, the logistical arrangements to get all the grain into Zimbabwe may take time, leaving the hardest hit communities and households vulnerable during the most critical part of the consumption year.
- Government has officially pledged to support WFP with 15,000Mt of maize grain to meet shortfalls in its current assistance programming. Though this commitment is set to improve WFP assistance, the probability of the grain getting into the country in time remains in question.

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http://www.herald.co.zw/an-fertiliser-shortage-looms/

⁵ [http://www.herald.co.zw/700t-of-maize-arrive-from-sa/](http://www.herald.co.zw/700t-of-maize-arrive-from-sa/)

⁶ [http://www.dailynews.co.zw/articles/2014/01/06/sa-maize-imports-under-threat](http://www.dailynews.co.zw/articles/2014/01/06/sa-maize-imports-under-threat)
5) **Resource constraints for adequate food assistance:**

- Both WFP and government are faced with critical resource constraints to assist the targeted numbers of food insecure communities and households. WFP has had to reprioritise districts for support under the Seasonal Targeted Assistance (STA) programme as well as cutting of ration sizes and cash transfer values. This means even those under food assistance may need to supplement their food needs by other means.

- The Government of Zimbabwe entered into a $25 million maize import agreement for 150,000 Mt with the Government of Zambia in the first half of 2013. However, so far, reportedly less than 20,000 Mt has been realized.