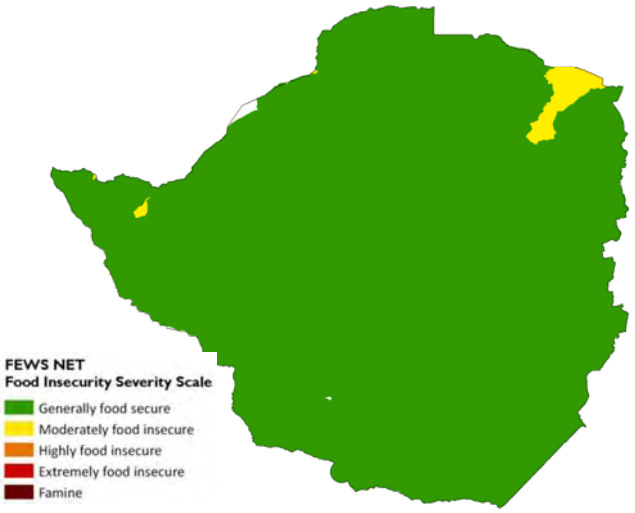
ZIMBABWE Food Security Outlook April-September 2009

- Generally, food security in Zimbabwe continued to improve throughout March and April (Figure 1), on account of the arrival of the 2008/09 harvest, complementing the last food aid distributions and readily available private sector food imports in local markets.

- However, access to food by chronically food insecure populations throughout the country, (about 10 percent of the national population), continues to be a serious challenge in cases where no social safety nets or properly formulated food aid assistance exists.

- Households and individuals that are dependent on the market for their food and who have unreliable income sources continue to face serious difficulties accessing adequate food, due to their limited purchasing power. Such households are predominantly found in urban centers and on mines and farms where little or no production is currently taking place.

Figure 1. Estimated food security conditions, April 2009

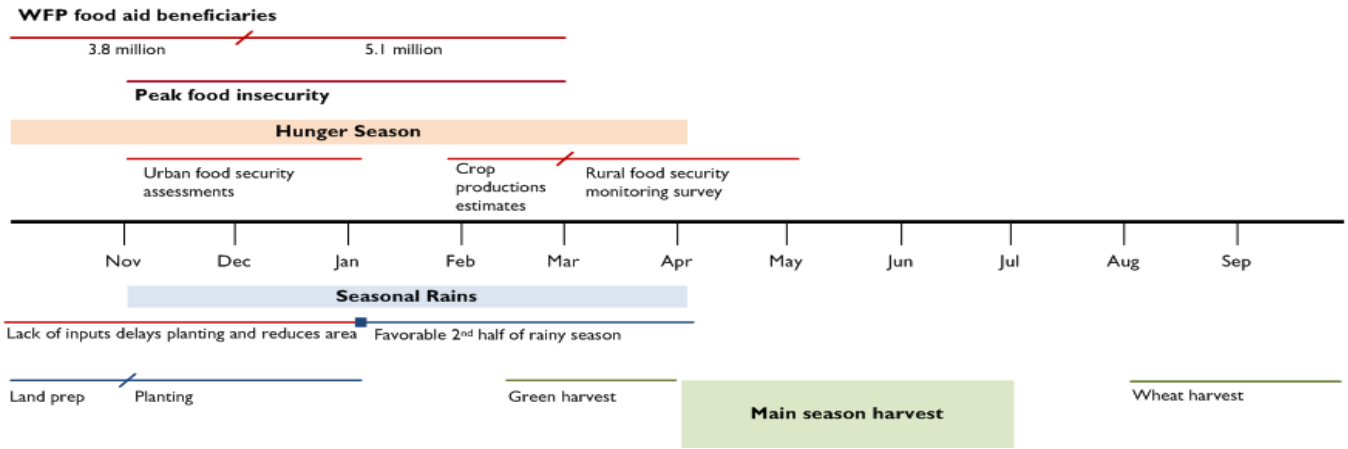


See www.fews.net/FoodInsecurityScale for more information on the FEWS NET food insecurity severity scale.

Source: FEWS NET

- The 2008/09 harvest, much improved compared to last year, is likely to improve food access for rural and urban households in the early part of the 2009/10 consumption year. However, assessments estimate that most rural households will face cereal harvest deficits of between four and six months during the consumption year. Other income sources – including market gardening, casual labor, and livestock sales – are likely to reduce cereal access difficulties for most households to less than four months in most rural districts. Urban farming households, the majority of which are poor, are expected to have cereal access from their own harvests for about four months.

Seasonal calendar and critical events timeline



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Current food security conditions

Generally, food security continued to improve in Zimbabwe throughout March, due to the arrival of the 2008/09 harvest, complementing remaining food aid distributions and private sector food imports on the market. As the 2008/09 consumption year ended in March, government and humanitarian imports were estimated at 490,000 MT and 330,000 MT, respectively. Given that maize meal imports from South Africa, Botswana, and Zambia, and rice from Mozambique were readily available on the market from January, the remaining cereal gap (about 160,000 MT) is likely to have been met by private sector cereal imports that peaked in January and February 2009 (Table 1). Increased food supplies on the market continue to exert pressure on suppliers to cut their marketing margins in order to compete for the stagnant and, in some cases, falling demand for staple foodstuffs. This development continues to benefit most households that are dependent on the market for their food supplies. (about 20-30 percent of the population from March through to August in most years and about 60 percent during the peak hunger period of November to January).

Table 1. National cereal balance sheet as at 13 March 2009

	CFSAM Projection (MT)	As of 13 March 2009 (MT)
National requirements*	1,773,000	1,773,000
Opening stock	19,000	32,000
Production	759,000	759,000
Government imports	600,000	493,000
Food aid imports	380,000	329,000
Informal cross border imports	23,000	unknown
Cereal surplus/deficit	8,000	(160,000)

* Based on CSO 2008 projected population of 11.865 million. Includes human, livestock, and industrial consumption.

Source: GoZ, WFP, C-SAFE

However, access to food by highly vulnerable households continues to be a serious challenge in cases where no social safety nets and/or food aid assistance exists. These populations make up the majority of the chronically food insecure in Zimbabwe (about 10 percent of the total population as estimated in past ZimVACs). They are very poor individuals or households with members who are not economically active because they are physically or mentally disabled, chronically ill, aged, or too young. In cases where no proper food assistance programmes are in place for a variety of reasons, including lack of NGO presence, these people depend on handouts. Child labor is also common among child-headed households. These populations are generally concentrated in communal areas were the elderly retire.

Figure 2. Maize grain prices trends at Mbare Musika, Harare

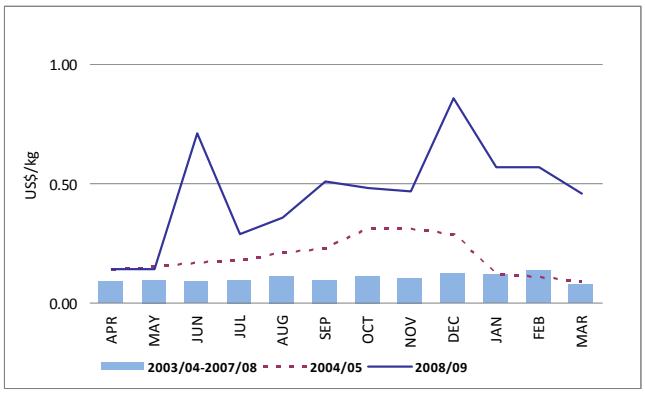
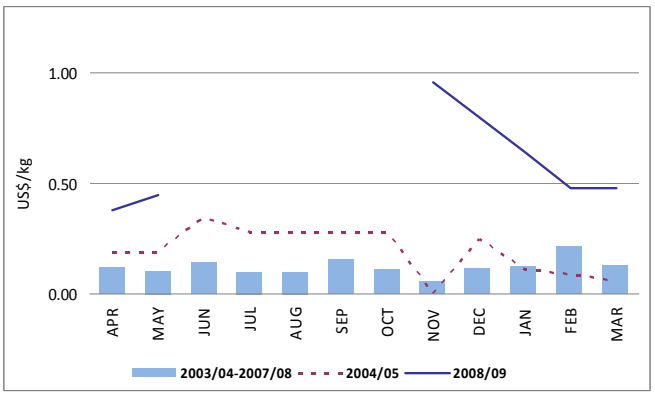


Figure 3. Maize flour price Tends at Mbare Musika, Harare



Source, Figures 2-3: FEWS NET

Zimbabwe's depressed economy continues to limit employment opportunities, and the majority of those still employed earn relatively low wages, limiting their purchasing power for food and other basic commodities and services. The Government of Zimbabwe (GOZ), currently one of the biggest employers, is facing serious challenges paying its employees due to its lack of revenue, limited access to credit, and years of cumulative economic decline. It has resorted to giving USD100/month to all its employees regardless of grade since February as a stop-gap measure. In the meantime, the Consumer Council of Zimbabwe estimated the minimum food basket for low income urban households at USD124.25 in February and USD120.62 in March, and the Central Statistical Office's food poverty line for a household of five people for

February and March was USD157.93 and USD143.13, respectively. All these standards show the government allowance alone to be too low to adequately support employee households. Such low salaries are not uncommon with the private sector, either, and households often supplement these incomes with additional income from informal economic activities, though these opportunities are limited.

While prices of staple and other basic food items have fallen by between 40 and 50 percent since December 2008, due in part to favorable climate conditions, they remain between three and six times higher than the five-year average for March (Figures 2,and 3).

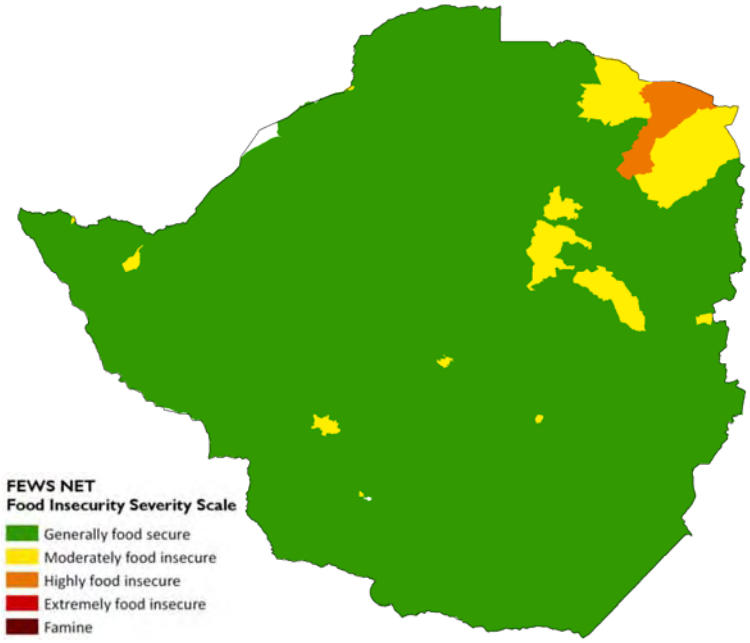
The Ministry of Agriculture's harvest estimates, and preliminary FAO estimates for food and non-food crops, indicate a significant overall increase from last years' historical low harvest. The ZimVac interim assessment results also indicate significant improvements in household cereal harvests this year compared to last year.

Given serious maize seed access challenges last planting season, a considerable proportion of smallholder farmers resorted to planting commercial seed acquired the previous season and/or grain meant for consumption (from the previous harvest and/or from food aid programmes). SADC and several NGOs provided some farmers with seeds and fertilizer inputs. Some farmers also accessed remittances from the diaspora - in part in the form of maize seed and fertilizers. These efforts resulted in area planted to maize dropping by a modest 14 percent compared to last year. Despite the challenges farmers faced in accessing seeds and fertilizers, and the reduced area planted, the good quality 2008/09 rainfall season made up for a significant proportion of the potential reduction in yields.

Figure 4. Most Likely food security scenario, April-June 2009

Source: FEWS NET

Figure 5. Most Likely food security scenario, July-September 2009



Source: FEWS NET

Smallholder farmers also relied on traditional informal seeds sources for other food crops (sorghum, millet, groundnuts, sweet potatoes, soy beans, and sunflower). Good rains in most of the country resulted in normal crop growth, but the fertilizer shortages that persisted throughout the growing season reduced yields to below normal. With better seed and fertilizers access the 2008/09 could very well have matched the good harvests of the 1990s.

Since over 80 percent of rural households and 60 percent of urban households get a significant proportion of their annual food requirements from their own crop production, improved harvests are likely to lead to improved post-harvest food access for the majority of these households compared to same time last year. However, all assessments indicate that many households will face cereal deficits, especially between October 2009 and January 2010, as sizeable national level production deficits are forecast for maize, sorghum, and millet.

Generally livestock conditions are fair to good across the country; grazing is good and drinking water for animals is adequate in most areas. Dipping remains erratic, resulting in high incidences of tick borne diseases. Given heavy destocking in most communal areas that faced food security problems last consumption year when vulnerable households were exchanging their livestock for maize grain, most households now prefer cash sales to cater to their other incidentals.

Most-likely food security scenario, April- September 2009

Own crop production is the major source of food for over 80 percent of rural households and about 60 percent of urban households in the first four to six months of most consumption years. As the 2008/09 harvest is likely to be close to but below normal, it is anticipated that these households should have relatively sufficient access to their own production for the first four to six months (between July and September) of this consumption year.

The majority of rural households' food crop harvests are likely to last for more than six months, except in the districts of Mt. Darwin, Rushinga, Hwedza, Mudzi, Mutoko, Seke, and Uzumba Maramba Pfungwe. In these districts, households' harvests were reduced by a prolonged dry spell in February. As such, households in these areas are likely to meet consumption requirements from their own production for about three to four months (between June and July), after which they will require food assistance. In addition, most of these households have limited access to other income sources, including market gardening, casual labor, livestock sales, etc.,,to access food on the market.

Uzumba Maramba Pfungwe and Rushinga districts are expected to have the least household food production levels – barely enough to cover two months. As such, these two districts are likely to be moderately food insecure before the end of the April-June outlook period.

Due to slightly better production prospects, food access is expected to be generally adequate in the first three months for most households in Mt. Darwin, Hwedza, Mudzi, Mutoko, and Seke districts. During April-June, even those households that are normally unable to produce their own food in these districts are likely to have access to adequate food through local safety nets, as well as through offering their labor in exchange for food. However, as food availability falls in the next six months, not only are households that currently have adequate food access to their own harvests likely to face food access difficulties, but those poorer households who were dependent on them are also at increased risk of food access difficulties. As a result, food security is expected to deteriorate to moderate levels in Mt. Darwin, Hwedza, Mudzi, Mutoko, and Seke districts and to high levels in Rushinga, and Uzumba Maramba Pfungwe districts during the outlook period (Figures 4, 5).

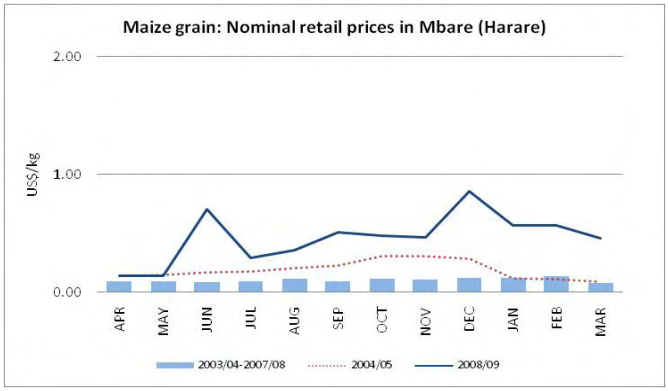
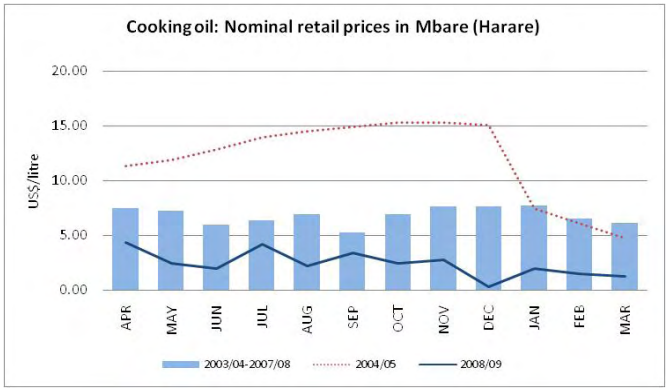
Urban agriculture is expected to make a significant contribution to household food access in the April to June period in all major urban centers, save for Kariba, Beitbridge, and Victoria Falls, where urban crop production is generally limited to very small plots reserved for kitchen gardens. In these towns, households' purchasing power and market availability of food are the major determinants of household food access. General food security is expected for most households in these urban centers, as the income opportunities from cross-border activities are expected to persist and be complemented by fishing- and tourism-related incomes, particularly in Kariba and Victoria Falls.

In urban centers with significant urban agriculture, including Harare, Marondera, Bindura, and Murehwa, general food security is expected from April to June, though this will likely deteriorate to moderate food insecurity during July-September, when most urban households that produced their own food will have run out and will revert back to the market, causing staple food prices to increase. However, these price increases are likely to be moderated by maize meal imports from South Africa and Botswana, which are expected to continue without restriction. It is highly unlikely that the economic situation will improve to a point of strengthening average household purchasing power during the outlook period. As such, most urban households are expected to be moderately food insecure from July to September.

Table 2. Events which could affect the food security outlook

Geographic Focus Area	Events that would change the most likely scenario	Impacts on food security conditions	Likelihood of occurrence*	Key variables to monitor
Urban centers	Restriction on imports of cheaper maize meal from south Africa, Botswana, and Zambia	Reduced supplies of maize meal on markets leads to increases prices and reduced purchasing power for market-dependent households	Unlikely	Import regulations for maize meal and other basic foodstuffs; maize meal and grain prices
Rural areas with about six months of their own production	Increased costs for non-food household goods and services (education, healthcare, milling costs, transport, etc.)	Dollarization of the economy and limited stocks of hard currency has increased barter trade. Most rural households have only their crops to pay for other household goods and services. Increases in these costs could therefore result in early depletion of household food stocks.	Likely	Transport fares, milling cost, education and health fees
All areas, in particular urban areas	Resurgence of cholera from persistent poor water and sanitation conditions	Increased incidence of this disease will affect food utilization, resulting in poor nutritional status and sometimes death in short periods of time.	Likely	Cholera case surveillance
Communal areas, particularly Matabeleland	Veldt fires destroy available grazing due to lack of fire guards and irresponsible behavior	Reduced income contributions from livestock sales, loss of livestock assets due to animal death from poor grazing conditions.	Likely	Grazing conditions surveillance
	Livestock disease	Reduced income contributions from livestock sales.	Likely	Livestock diseases surveillance
Smallholder farmers' settlements neighboring national parks	Destruction of homestead crops by wild animals	Reduced households food availability	Unlikely	Monitor wild animal crop and food destruction
Central and northwestern districts	Reduction in cotton lint prices in line with global cotton prices and limited local finances	Over 70 percent of smallholder farming households in these districts depend on cotton as a cash crop. Reductions in cotton lint prices will reduce household revenues.	Likely	Cotton prices

* Probability levels	Description
Likely	Likely to occur in the time period under current conditions
Unlikely	Could occur in the time period if conditions changed moderately
Very unlikely	Could occur in the time period if conditions changed significantly

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

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.