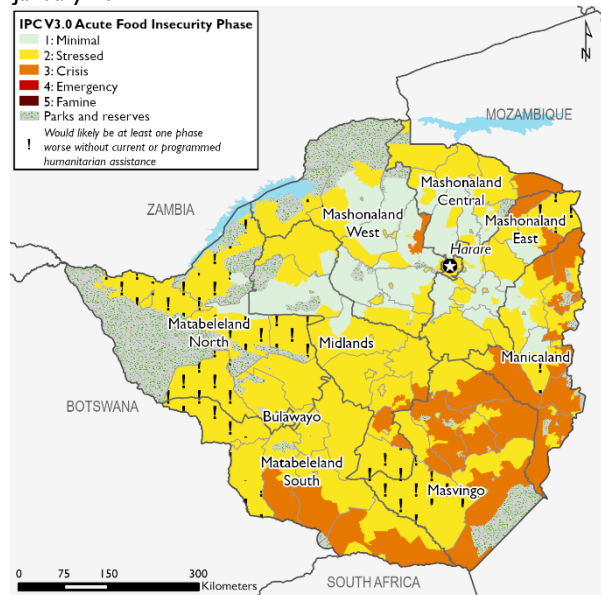


Below-average rainfall from mid-November negatively impacts planting and seasonal labor demand

KEY MESSAGES

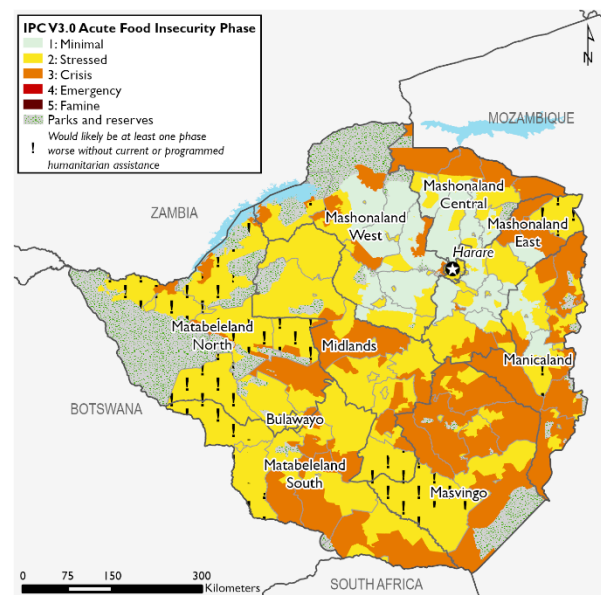
- Crisis (IPC Phase 3) outcomes are expected to spread in many deficit-producing areas through March, as poorer households face depleted own-produced food stocks and limited access to food on the market. Stressed! (IPC Phase 2!) outcomes are expected where humanitarian assistance will be significant. Conversely, Minimal (IPC Phase 1) and Stressed (IPC Phase 2) outcomes are expected in surplus-producing areas, where own-produced food stocks remain available for many households. Beginning in April, improvements in food availability and access are likely in both deficit- and surplus-producing areas as the 2022 harvests come in. Urban areas are expected to remain Stressed (IPC Phase 2) throughout the outlook period due to below normal income and atypically high prices.
- Prolonged dryness and above-average temperatures from early November to mid-December resulted in a false and delayed start to the 2021-2022 agricultural season and below-normal cropped areas across the country. In mid-December, some communities had yet to plant due to lack of rainfall. Where plantings had begun, germination rates have been generally poor with moderate to severe moisture stress, especially in the northern areas. Rainfall received from mid-December resulted in farmers progressing with planting and replanting. However, given below-average rainfall to date, it is unlikely that this year's above-normal cropped area targets will be met by the time the typical window for planting closes in early January.
- Seasonal casual labor slowed down significantly in December with the delay of the agricultural season. Livestock sales and vegetable production and sales were also below normal levels, partly due to continued dryness in parts of the country. Other livelihood options such as informal cross-border trade and remittances remained constrained as a result of on-going macroeconomic challenges and COVID-19-related restrictions. Humanitarian assistance proceeded at below typical levels, given the above-average crop production in 2021.
- The government tightened some COVID-19-related restrictions in mid-December, extending the Level 2 lockdown following a nearly 4,000 percent spike in weekly confirmed cases since the end of November. Poor urban households are most likely to be impacted by the new measures through the expansion of nightly curfews, among other measures. These exacerbate the on-going negative COVID-19-related impacts to livelihoods and household income, especially in the informal sector.

Projected food security outcomes, December 2021- January 2022



Source: FEWS NET

Projected food security outcomes, February-May 2022



Source: FEWS NET

FEWS NET classification is IPC-compatible. IPC-compatible analysis follows key IPC protocols but does not necessarily reflect the consensus of national food security partners.

CURRENT SITUATION

Despite some seasonal rainfall in early November, the start of the main agricultural season saw widespread below-average rainfall, with abnormal dryness and high temperatures observed throughout the country from early November to mid-December (Figure 1). In December, the Climate Prediction Centre's Africa Hazards Outlook reported maximum temperatures averaging 4-8 degrees Celsius above-average over Southern Africa. These high temperatures reduced soil moisture and slowed planting.

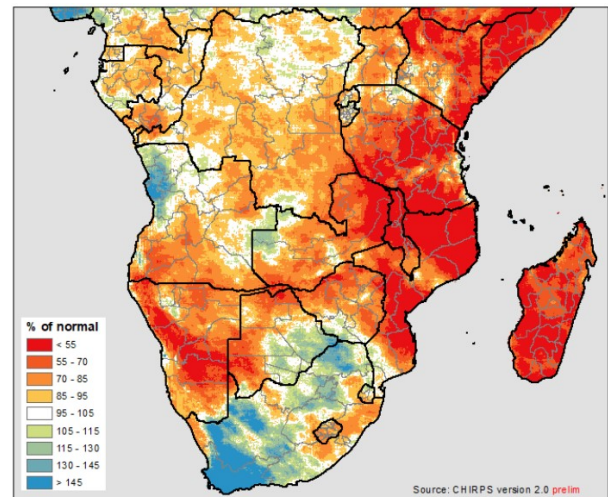
Planted area for most crops was therefore significantly below normal for this time of year. According to the Ministry of Agriculture, maize cropped area was just 207,000 hectares by December 10, 50 percent below the same time last year, while sorghum and pearl millet were approximately 60 and 50 percent below last year, respectively. By mid-December, planting had not yet started in some communities, particularly in the north and east. Households that did plant in early November experienced poor germination. Crops that were at early vegetative stages across most areas suffered various levels of moisture stress, with near-total write-offs reported in worst affected areas in northern, northwestern, and eastern parts of the country. However, overall losses were marginal in all areas given below-normal cropped area. These developments reduced agricultural labor opportunities for land preparation, planting, weeding, and chemical application across most areas. Low labor demand also resulted in reduced rates of wages and informal payments, impacting poor household income and causing some household members to resort to atypical income generating options. Vegetables, widely produced in between rainy seasons, were also negatively affected by the dry spells, resulting in shortages and price increases for some produce like green leaf vegetables.

The return of rainfall across most parts of the country starting in mid-December brought relief to farmers and allowed for planting and replanting to resume and for cropped areas to increase. Given the delayed start of the season, some commercial farmers and those smallholder farmers with access to short- and medium-term maize varieties have decided to switch to them for the season. Furthermore, high prices and below normal income are continuing to constrain poorer households' access to crop inputs. The government input distribution has continued in parts of the country; according to WFP internal monitoring in November, the government is the main source of inputs for approximately three-quarters of smallholder farmers across the country.

Water availability for domestic, livestock, and other livelihood uses has not improved yet in most areas due to the poor start in seasonal rainfall. Pastures have slightly improved in response to the early and recent rainfall, although livestock conditions remain mainly poor to fair in typical semi-arid areas. Concern over tick-borne diseases remains high in most districts due to dipping chemical shortages and irregular dipping. However, the Department of Veterinary Services has reported that seasonal tick-borne diseases (mainly Theileriosis or January disease) are expected to be lower this year than in recent years thanks to increased supply and distribution of dipping chemicals. Poor livestock conditions – particularly in typical semi-arid areas and compounded by above-normal, mainly cattle losses in recent years – are negatively impacting sales and household income. Simultaneously, livestock sales are below-average given below-average purchasing power and demand, caused in part by poor macroeconomic conditions.

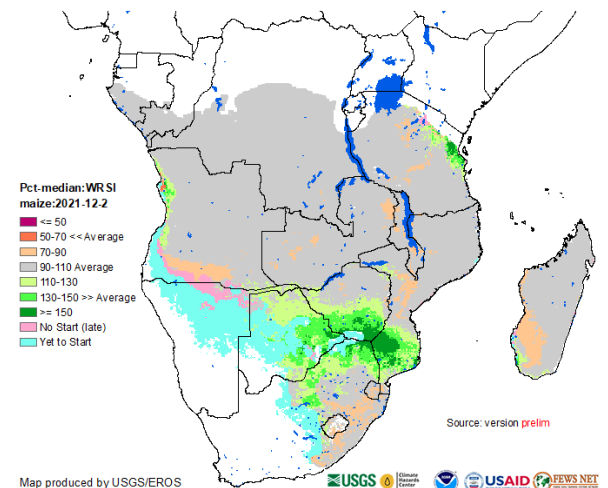
Prices of most basic foods and other commodities continued to increase in both USD and ZWL during the month, driven mainly by high and increasing parallel market exchange rates, which prevailed between 180-200 ZWL/USD, at least 65 percent above official rates. At about 109 ZWL/USD as of mid-December, the official auction exchange rate recorded a 10 percent increase

Figure 1. Widespread below average cumulative rainfall across Southern Africa, rainfall Oct 1 to Dec 10, 2021, as a percent of normal



Source: USGS/FEWS NET

Figure 2. Extended Water Requirement Satisfaction Index (WRSI) anomaly for maize, forecasted magnitude as a percent of the median at the end of the growing season



Source: USGS/FEWS NET

from early November. Annual inflation and cost of living as reported by ZIMSTAT continue to rise, increasingly negatively impacting poor households' access to food and other basic commodities and services in both rural and urban areas. The food poverty line – the amount required to meet minimum food needs of 2,100 calories per person per day – increased by 6.2 percent to ZWL 5,760 per person per month in December. The total consumption poverty line, which includes the cost of minimum basic food and non-food needs, increased by 6 percent to ZWL 8,000 per person per month. Fuel prices in ZWL increased by at least 10 percent early in the month, putting additional pressure on other food and commodity prices. These increases are eroding household purchasing power and rendering more poor rural and urban households unable to meet their basic food and non-food needs. In December, monthly inflation remained stable at 5.8 percent, while a marginal increase in annual inflation was recorded, up to 60.7 percent in December from 58.4 percent in November. In line with macroeconomic and market developments, the Zimbabwean government increased its annual inflation projections for the year-end to 52-55 percent from 25-35 percent, up considerably from the initial target of less than 10 percent. In addition, the government has increased the 2021-22 producer prices for maize, small grains, and soya beans – which are determined and set pre-planting – by 83, 85, and 162 percent, respectively, above the prices at the end of the 2020-21 marketing season. Some stakeholders have expressed concern that these amounts will have already been eroded by inflation by the time the new marketing season begins.

As the lean season intensifies, the majority of households in typical deficit-producing areas are relying on markets and other sources of cereal as their own-produced food stocks have depleted. Cereal availability on the open markets, especially maize, continues to be significantly below normal, mainly due to the government directive that grain be marketed through the Grain Marketing Board (GMB). Maize sales – even in surplus-producing areas – have been further reduced as a result of speculative withholding given the poor start of the 2021-22 season. WFP reports that maize grain was available in only 5 percent of monitored rural and urban markets in November. In addition, maize meal was available in 89 percent of monitored urban markets, and 43 percent of monitored rural markets, up from 33 percent in October. As market supply for maize tends to be erratic, a portion of households are resorting to eating small grains. Government reports indicate that grain distribution from the GMB for humanitarian assistance has now begun although grain released directly to the market remains unlikely.

There was a dramatic increase in the number of confirmed COVID-19 cases during the month compared to the previous few months, marking a fourth wave of the pandemic. Following the detection of the new Omicron variant in South Africa in late November, national confirmed cases broke daily records since the start of the pandemic, with over 6,000 daily cases by mid-December. Weekly confirmed cases as of mid-December were nearly 4,000 percent above those at the end of November. The government responded by extending Level 2 lockdown restrictions, instituting mandatory quarantine measures for COVID-19 positive arrivals in the country, extending nightly curfew hours, thereby reducing business hours, banning in-person meetings for all government business, scaling down most government staff on duty to 30 percent and, banning meals served in common areas in hotels and lodges. The government is also reportedly planning new rules requiring passengers to provide proof of vaccination to be able to use public transportation. These measures have had some negative impacts on household income, especially in the informal sector. In addition to land border closures for non-essential services negatively impacting cross-border trade and remittances, the additional regulations reduced flows of returnees and visitors at the country's borders ahead of the festive season, further impacting remittances and other livelihood opportunities. Towards the end of the third week of December, the rate of increase in daily confirmed cases started slowing, though cumulatively the spike in cases continues.

Following above normal harvests in 2020-21, planned humanitarian assistance is below that received in recent years across most parts of the country, both in terms of targeted rural areas and beneficiaries. Government plans are to reach 937,000 beneficiaries in December and 1.2 million beneficiaries between January and March 2022. The government has shifted from a typical ration of 50 kg of cereal per household per month to 10 kg per person per month. WFP and partners planned to reach nearly 542,000 beneficiaries in December across 12 rural districts with cereal, pulses, and vegetable oil, increasing to 650,000 beneficiaries between January and March 2022. Other donors are targeting about 90,000 beneficiaries in selected districts.

Currently, most households in deficit-producing areas have depleted own-produced food stocks and are relying on markets and other sources of food. Access to markets is poor due to high food prices and below normal income among most poor households given general macroeconomic conditions and ongoing COVID-19-related restrictions. The delayed start of the 2021-22 agricultural season further reduced poor household income as casual labor opportunities and rates of wages and informal payments were below anticipated levels. In addition, poor livestock conditions and vegetable production from the prolonged dryness are also negatively affecting sales and income. As a result, poor rural households are experiencing a deterioration in food security with additional districts experiencing Stressed (IPC Phase 2) or, increasingly, Crisis (IPC Phase 3) outcomes. Most surplus-producing areas are still experiencing Minimal (IPC Phase 1) outcomes or Stressed (IPC Phase 2) outcomes as own-produced food stocks generally remain available at household level. However, some poor households in localized communities in surplus-producing areas have limited or depleted own-produced food stocks. Urban areas remain Stressed (IPC Phase 2) as poor households face challenges meeting their basic non-food needs given low household income and very high food prices.

UPDATED ASSUMPTIONS

The assumptions used to develop FEWS NET's most likely scenario for the Zimbabwe Food Security Outlook for October 2021 to May 2022 remain unchanged except for the following:

- Due to the delayed start of the rainy season, extended dry periods, and shortened planting window, initially projected above-average cropped areas are no longer likely. Cropped areas for most crops are now projected to be normal at the national level with localized areas of below-normal cropped area in northern and northwestern Zimbabwe.
- Below normal rainfall is forecasted through the end of December in the northern parts of the country covering the Mashonaland Provinces, followed by average rainfall for the remainder of the cropping season. Since these provinces constitute the typical surplus-producing areas, and given the planting window will constrain cropped areas to normal levels, overall national production for the 2021-22 cropping season is now projected at normal levels.
- A resumption of rainfall in southern Zimbabwe by mid-December and average rainfall forecasts for the remainder of the cropping season are likely to produce slightly above-average cropping conditions and production across deficit-producing areas (Figure 2).
- After the prolonged dryness in November and December, water availability and access expectations have been reduced and are now expected at normal levels in high rainfall areas.
- Significant movement and gatherings during the festive season are likely to cause a post-festive season spike in COVID-19 cases, as with early 2021. However, the government is unlikely to institute additional restrictions, continuing instead with the stricter version of Level 2 lockdown recently introduced.

PROJECTED OUTLOOK THROUGH MAY 2022

Through March 2022, most surplus-producing areas – mainly the Mashonaland Provinces – are expected to continue experiencing Minimal (IPC Phase 1) outcomes in the more productive resettlement areas. Stressed (IPC Phase 2) outcomes are expected in communal areas, which are both less productive and have fewer income generating opportunities, negatively impacting households' ability to meet their non-food needs. In contrast, Crisis (IPC Phase 3) outcomes are expected to spread in most typical deficit-producing areas until the peak of the lean season in March. This is due to reductions in expectations in agricultural labor opportunities and associated income, depleted own-produced food stocks, and limited access to foods and other commodities on the market given poor macroeconomic conditions. Given the delayed start of the season, green harvests, which arrive between February and March, are now expected at normal levels and will therefore have marginal impacts on food security outcomes. Those areas with significant humanitarian assistance are expected to experience Stressed! (IPC Phase 2!) through March 2022. Outcomes from the peak of the lean season are mapped for February – May 2022.

Between April and May, food security outcomes are expected to improve across the country with the arrival of the main harvests, with average yields anticipated. Minimal (IPC Phase 1) outcomes are likely across surplus-producing areas, however, macroeconomic conditions and lingering impacts of multiple shocks are expected to negatively impact some rural households' purchasing power. In deficit-producing areas, this combination is likely to result in widespread Stressed (IPC Phase 2) outcomes.

Urban areas are expected to remain Stressed (IPC Phase 2) throughout the outlook period. Poor households may meet their minimal food needs but will continue to experience increasing difficulty accessing other foods and non-food needs mainly due to below-average income, above-average prices, and increasing cost of living.

FEWS NET: Zimbabwe Food Security Outlook Update December 2021: Below-average rainfall from mid-November negatively impacts initial planting and seasonal labor demand, 2021.

ABOUT SCENARIO DEVELOPMENT

To project food security outcomes, FEWS NET develops a set of assumptions about likely events, their effects, and the probable responses of various actors. FEWS NET analyzes these assumptions in the context of current conditions and local livelihoods to arrive at a most likely scenario for the coming eight months. [Learn more here.](#)