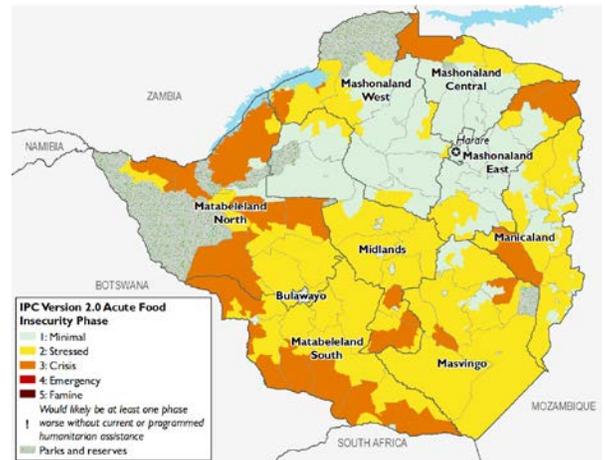


Below-average household incomes to affect food access as prices increase

KEY MESSAGES

- Most northern and high crop-producing areas are currently experiencing Minimal (IPC Phase 1) food security outcomes and these are expected for **the entire outlook period**. Several marginal production areas in the southern, central, and extreme northern regions are currently Stressed (IPC Phase 2) and in Crisis (IPC Phase 3) because of reduced or depleted own-produced food stocks, depressed livelihood activities, and reduced household incomes due to prevailing economic challenges. These outcomes are likely to continue during the **October to January** period.
- From **February to March**, Crisis (IPC Phase 3) outcomes are expected to persist in some areas during the peak lean season. Humanitarian assistance is expected in several areas in the south, west, and extreme north, and is likely to improve outcomes to Stressed (IPC Phase 2!). The main harvest is expected to start from **April to May** and will result in mainly Minimal (IPC Phase 1) and Stressed (IPC Phase 2) outcomes.
- National shortages in local bond notes and foreign currency continue to adversely impact livelihoods in both rural and urban areas. The use of alternative modes of payment is contributing to the increased costs of goods and services. With reduced incomes because of depressed livelihood activities, the ongoing macroeconomic situation is expected to constrain food access for poor households this consumption year.

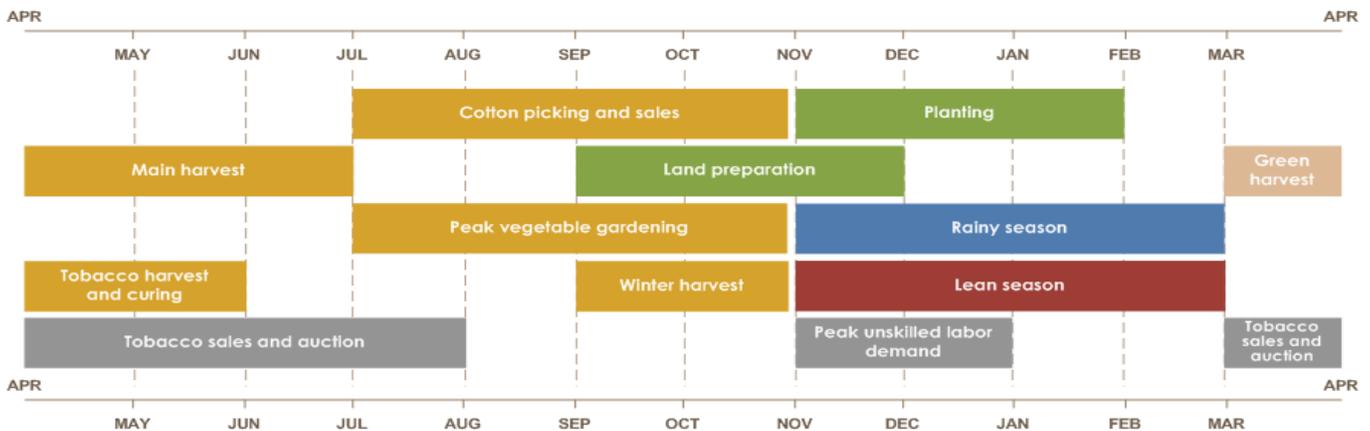
Current food security outcomes, October 2017



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.

SEASONAL CALENDAR FOR A TYPICAL YEAR



NATIONAL OVERVIEW

Current Situation

Macroeconomic Conditions

Cash shortages (both bond notes and US Dollars) continue in the formal economy. The Reserve Bank of Zimbabwe (RBZ) reported that the backlog of foreign currency payments for imports increased from \$186 million in May to \$570 million in September. Many businesses, traders and individuals are increasingly turning to the informal markets for cash and are using alternative modes of payment. However, these types of transactions, e.g. Real Time Gross Settlement (RTGS) and mobile money transfers, can carry up to a 50 percent premium compared to paying in USD directly, putting upward pressure on business and household expenditures (**Figure 1**). Over the weekend of September 22–25, 2017, widespread shortages of some essential goods were reported, provoking panic purchases of staple foods and fuel, temporarily resulting in shortages, rationing, and very high prices.

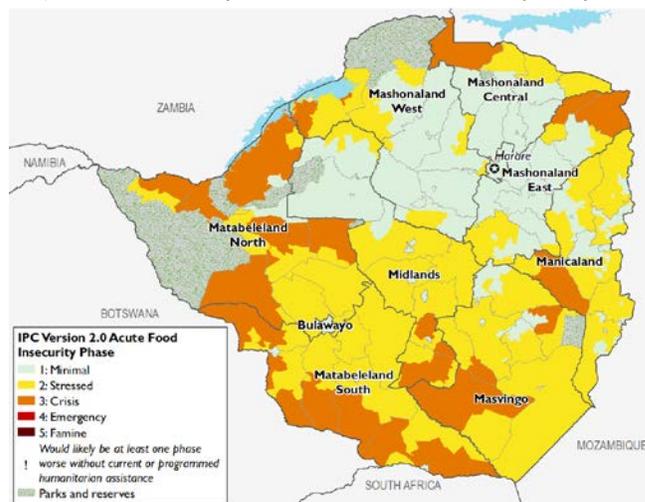
At the end of September, the government introduced regulations through Statutory Instrument 122A of 2017 to discourage informal cash vending. The central bank has reiterated that the official US Dollar to bond note exchange rate remains 1:1. Yet the bond note has progressively depreciated on the black market, fueling inflation.

Food Security

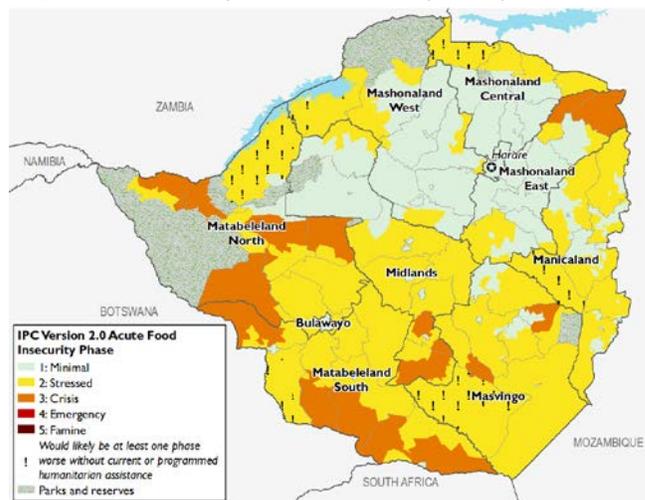
Households continue to consume own-produced cereals in traditionally surplus areas in the northern parts of the country. The WFP's monthly Food Security Monitoring indicated that approximately 84 percent of households were mainly consuming own-produced stock between August and mid-September. FEWS NET's monitoring in some cereal-deficit areas in September found that poor households were increasingly depleting their own-produced stocks and relying more on markets and other sources of food. Normal household income remains constrained across the country because of the liquidity crisis. The ZIMVAC estimates that from October to December, approximately 7 percent of the rural population or about 650,000 people will be food insecure, and that this will increase to 11 percent or 1 million people during the peak lean season.

National dam levels are above average, but reducing due to high temperatures and decreased inflows. Water availability and access situation for domestic, livestock, and other livelihood uses is above average in high rainfall areas, but remains low in traditionally arid areas, mainly in the south. Pasture conditions are good in the northern areas, as are cattle and small stock conditions. However, veld condition is fair to poor in the south, though cattle conditions are between fair to good. In some typical arid areas veld conditions have deteriorated significantly, especially where regeneration was poor following two consecutive drought years. The Ministry of Environment reported that since the start of the fire season on July 31 to early September, some 435,000 hectares were destroyed by fire.

Projected food security outcomes, October 2017 to January 2018



Projected food security outcomes, February to May 2018



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.

Agricultural Seasonal Progress

Deliveries of maize and small grains by farmers to the Grain Marketing Board (GMB) continue across most depots in surplus-producing areas. By end of September, the GMB had reportedly received 1 million MT of maize from the 2016-17 crop. The tobacco marketing season closed on August 11th and about 188 million kg of tobacco were reportedly sold, earning the country \$556 million in hard currency. The close of the marketing season worsened the critical foreign currency situation. The 2017-18 tobacco planting season is already underway, and the Tobacco Industry and Marketing Board expects a 14 percent increase in planted area compared to last season. Cotton marketing also continues, with activity higher than in recent years following higher selling prices and the government sponsored crop input support to farmers through the Cotton Company of Zimbabwe (Cottco). Cottco has indicated it will start paying the balances for farmers who delivered Grade A (\$0.55/kg) and Grade B (\$0.50/kg) cotton.

Internal Cereal Trade and Market Functioning

The Grain Marketing Board is buying cereals (maize, sorghum, and millets) at \$390/MT. At the same time the parastatal is selling maize to private millers at \$250/MT. The GMB has also maintained its maize and maize meal retail prices. Demand for the grain, even the subsidized grain, is low due to above-normal household stocks in most areas as well as cash shortages. Some traders are taking advantage of cash shortages by offering cash-desperate farmers low prices (e.g. between \$0.14-0.17/kg) and then reselling the grain for high profits. Demand for small grains is generally low, except for commercial purposes. In September the average maize grain price (\$0.28/kg) in FEWS NET sentinel markets remained atypically stable compared to August, but was 31 percent and 24 percent lower than last year and the five-year average, respectively. Grain prices have not reacted to the price increases that other non-cereal commodities are experiencing. In September, the average maize meal price (\$0.51/kg) decreased by 6 percent from August and remained lower than both last year and the five-year average price by 13 percent.

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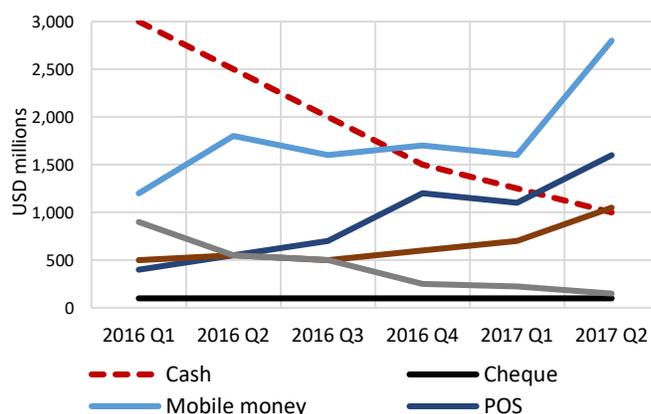
National Level Assumptions

From October 2017 to May 2018, the projected food security outcomes are based on the following key assumptions:

National cereal availability: National maize production from the 2016-17 cropping season was estimated at 2.16 million MT, 320 percent above the previous season, and 140 percent higher than the five-year average (Figure 2). Total cereal (maize and small grains) production was estimated at 2.44 million MT. The official national total cereal requirement for the 2017-18 consumption year is 1.57 million MT (Min. of Agriculture), though some independent sources indicate requirements between 1.8 million to 2 million MT. Following the maize import ban in early in the year, no significant maize imports are expected during the outlook period, which will be atypical for the country. The private sector which relies more on maize imports will largely source maize from the GMB, following a government directive. For the humanitarian assistance for the 2017-18 consumption year, some stocks from the GMB will likely be used while some agencies will likely import some stocks during the lean season.

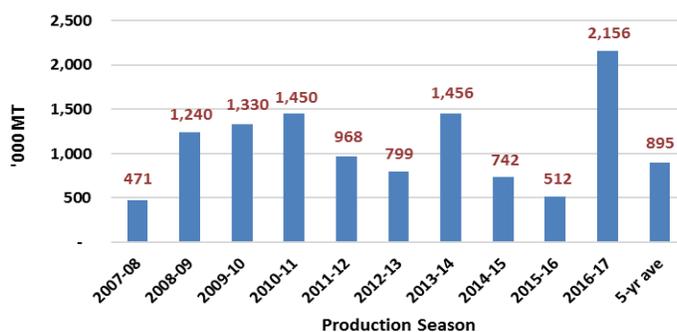
Prospects for 2017-18 main season production, maize grain: FEWS NET assumes national maize production for the 2017-18 production season will be average. Typical surplus-producing areas in the north will likely realize average production. Average

Figure 1. Value of retail transactions



Source: Reproduced from RBZ data

Figure 2. Maize production trends.

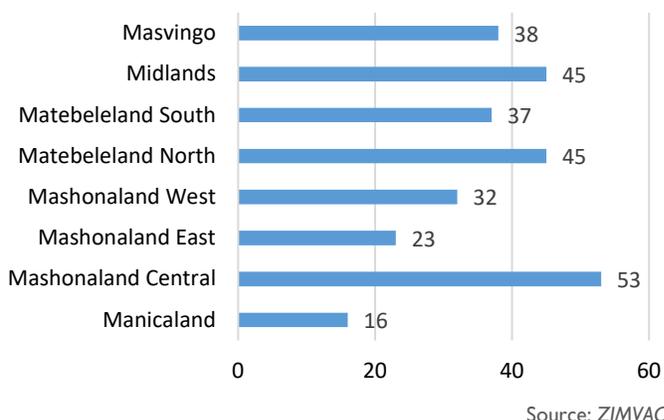


Source: Ministry of Agriculture

to below-average production is expected in the traditional deficit areas in the south, west and extreme northern parts of the country. The following factors will impact on maize production during the 2017-18 cropping season:

- **Seasonal rainfall forecast:** According to a recent analysis of international forecast models by NOAA and USGS, the start of the 2017/18 rainy season is likely to be normal and total cumulative seasonal rainfall during the October/November 2017 – March 2018 period is likely to be average tending to below average in Zimbabwe. In the northern and other typically higher rainfall areas of Zimbabwe, this forecast means there is likely to be normal crop establishment and growth, especially following an above average 2016-17 rainfall season that resulted in improved soil-moisture conditions in some areas. For the southern, western, extreme northern areas that are arid and drought-prone, this forecast could mean erratic rainfall early in the cropping season, resulting in reduced cropped area. These areas normally experience mid-season dry spells, so this could affect crops during the critical vegetative and reproduction stages. The green harvest that is expected in February and the main harvest in April maybe late in these drier areas.

Figure 3. Proportion of households affected by Fall Armyworm during the 2016-17 cropping season.



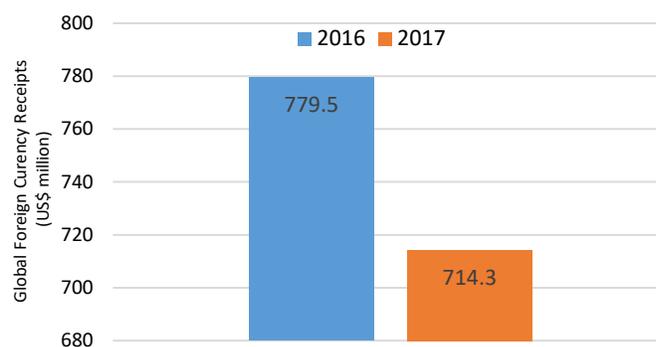
- **Availability of inputs:** Shortages of crop inputs (mainly fertilizers and chemicals) are likely to continue during the 2017-18 cropping season due to national foreign currency shortages. However, the government has reportedly put in place measures to facilitate fertilizer imports, including removal of import duties. Maize seed companies have assured farmers of adequate seed for the coming cropping season. Though small grain seed is expected to remain in short supply on the markets, farmers are expected to mainly use retained seed, as is typical.
- **Access to crop inputs:** Poor households will face challenges accessing inputs on the markets given poor incomes and high costs. The government plans to provide crop inputs (seed and fertilizers) to approximately 1.8 million small holder farming households under the Presidential Well Wishers Crop Input Scheme. Last season crop inputs were provided to only 800,000 households. The government has also reported plans to support farmers targeted during the second year of the Command Agriculture Program. About 400,000 cotton farmers are also planned to benefit from crop input assistance by the government this cropping season. Input distributions were planned to start ahead of the onset of rainfall season in October.
- **Fall Armyworm:** The Fall Armyworm (FAW) which attacked crops for the first time in Zimbabwe during the 2016-17 cropping season will almost certainly resurface during the 2017-18 season. According to the 2017 2nd Round Crop and Livestock Assessment Report, 8 percent of the area under maize was affected by FAW across the country last season, and the damage was estimated to be 2 percent. There are recent reports that the FAW has been detected on irrigated winter maize crop in many districts. Individual farmers will likely find it difficult to procure chemicals to control the pest and with the ongoing cash shortages the government may face difficulty in procuring chemicals as well. Field reports indicate that there were plans to extend education and training activities to help farmers identify, manage, and control the pest, but such activities have reportedly not reached all parts of the country. Besides, the cost of most effective chemicals will be out of reach of most poor farmers.

Livestock conditions: Cattle conditions are expected to be fair to good during the outlook period. This is more so in the higher rainfall areas in the north where pasture and water conditions are expected to be good. Goats will remain in good condition across the country. However, cattle sales are expected to trend below seasonal averages due to cash shortages that may affect some buyers. This will affect cattle prices more than goat and chicken prices, which are expected to remain typical.

Macroeconomic conditions: The continued liquidity challenges in the country will adversely impact livelihood options and food access for poor households during the outlook period. Rising demand and shortages of foreign currency and local bond notes will put increasing pressure on the value of transactions in the parallel market, increasing prices of commodities and services, and mostly affecting poor households. Inflation is also expected to rise significantly during the outlook period. Macroeconomic conditions will also have an impact on the following income sources and livelihood activities:

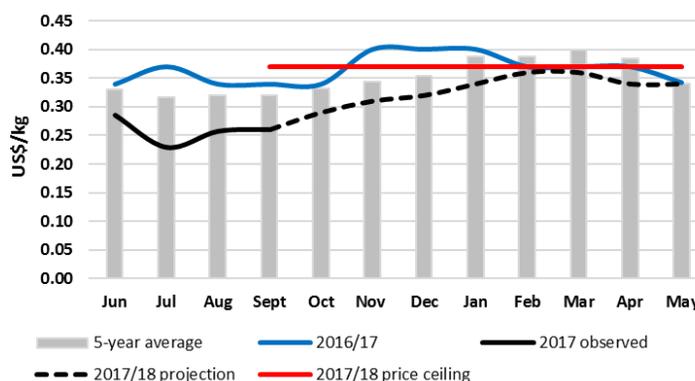
- **Agricultural labor availability and rates:** Prevailing cash shortages, above-average crop supplies, and low grain prices on the markets will affect crop sale incomes in cereal-surplus areas which happen to be a major source of income. This will constrain middle and better-off household's incomes, directly and indirectly impacting on labor opportunities and labor rates for poor households. Labor rates are likely to be below average, with payments mostly in-kind. Terms of trade will be unfavorable for poor households due to general price increases.
- **Non-agricultural labor availability and rates:** Opportunities for non-farm labor will remain below average throughout the outlook period. Most sources of income for middle and better-off households will be constrained, affecting their capacity to engage poor households. At the same time labor rates will be below average. In parts of the south and extreme north, above average labor supply from mainly among the poor households will also affect labor rates.
- **Remittances:** As has been the case for close to two years now, remittance levels mainly from South Africa are expected to remain subdued, affecting mostly the southern parts of the country. Local remittances will be affected by economic challenges in the economy which will constrain livelihoods. Typical in-kind remittances from mainly South Africa and Botswana will also be below-average owing to the 2016 import restrictions on a variety of food and non-food commodities (**Figure 4**).
- **Livestock prices and terms of trade:** Livestock terms of trade will be influenced by anticipated below-average grain prices affecting poor households disposing their livestock in exchange for cereal. Also, the seasonal increase in demand for meat during the festive season (November and December) is expected to be below average due to ongoing liquidity crisis.

Figure 4. International remittance trends.



Source: RBZ data

Figure 5. Maize grain prices and projections, Mbare, Harare.



Source: FEWS NET

Non-cereal food prices: Based on current trends, FEWS NET assumes that prices of other non-cereal basic food commodities will continue to increase during the outlook period. These non-cereal items include cooking oil, sugar, and flour. An increase in prices is expected for these items due to continued shortages of foreign currency during the outlook period. Increased demand during the festive months of November and December is also expected to push up prices for these items.

Integrated maize grain price projections: As is typical between *October and December*, maize grain prices for Mbare (Harare) and other northern markets are expected to increase during this period as demand on markets increases (**Figure 5**). However, this year maize grain price increases are expected to be relatively marginal. Prices are expected to trend 15-25 percent below last year and 10-15 percent below the five-year average. This is mainly due to above-average supplies of maize in source markets

mainly in the north and anticipated cash shortages during the outlook period. In deficit-southern areas prices will be relatively higher, but still below last year and the five-year average. During the *January to March* period maize prices will behave normally. Due to increased demand on markets and reduced supplies from source areas, prices are expected to further increase, peaking between February and March. However, prices are expected to still trend below last year and the five-year average by 5-15 percent and 5-10 percent, respectively. As is typical, maize grain is likely to be unavailable in some markets in the southern and western districts during the peak lean season. Maize meal will constitute the main cereal consumed by majority of households in these areas. Between *April and May*, prices are expected to take an expected seasonal dip due to the contribution from green harvests and early harvested crops.

Integrated maize meal price projections: Maize meal prices are expected to follow seasonal trends, increasing with demand from October onwards (especially in cereal-deficit areas in the south and west). Demand and prices of maize meal will peak around January and February. Prices will start to drop thereafter with the green harvests, and the main harvest in April. However, private millers are likely to pass increased costs of production onto consumers if the current inflationary trend continues. This will like push up maize meal prices, affecting poor households purchasing power.

Humanitarian assistance: Humanitarian assistance is expected to start in October/November in the worst affected districts. WFP has planned for lean season assistance to begin in November in 13 districts and reach almost 172,600 beneficiaries. Beneficiaries in some districts will receive in-kind rations, while in others there will be a combination of in-kind rations and cash payouts. The program will upscale to 32 districts at peak (by January to March) targeting about 494,000 beneficiaries. The government also plans to assist food insecure households in targeted areas across the country. Plans from other partners were not yet available. FEWS NET's food security outcomes are based on available data and information and will be updated regularly.

Acute Malnutrition: The most recent national level nutrition survey was by ZIMVAC in May 2017 under the 2017 rural livelihoods assessment. It used the SMART methodology. Sampled children 6-59 months old in 60 districts were assessed. The national Global Acute Malnutrition (GAM) prevalence based on the May 2017 survey is 3.2 percent which is Acceptable according to WHO thresholds. FEWS NET expects that the national GAM prevalence is likely to remain within the Acceptable range (under 5 percent) during the outlook period across the country. Though poor households in the typical cereal-deficit south and extreme north will start facing food deficits and poor consumption patterns from October the situation is not expected to drastically worsen acute malnutrition levels. Green harvest across the country mainly from January to March will also improve availability and consumption patterns. Malnutrition levels are likely to be seasonally influenced by localized disease cases, but illnesses are unlikely to reach epidemic proportions.

Most Likely Food Security Outcomes

October to January: Consumption of own-produced food stocks is expected to continue in **the north and other high production areas**. At the same time, incomes from crop sales will enhance household incomes for other food and non-food items. On-farm and off-farm labor for poor households, mostly paid in-kind, is expected. As a result, **Minimal (IPC Phase 1)** food security outcomes are expected during this outlook period. However, a few areas will experience **Stressed (IPC Phase 2)** outcomes as limited livelihood opportunities (mostly due to economic challenges and cash shortages) result in livelihood protection deficits. In the **south, west, and extreme northern areas**, most poor households are expected to have exhausted own-produced stock. Market purchases will be limited due to poor incomes and relatively high food prices. Faced with increasing food gaps and livelihood protection deficits, **Crisis (IPC Phase 3)** food security outcomes are expected in most of these areas. Anticipated humanitarian assistance will likely improve the situation to **Stressed (IPC Phase 2!)** outcomes in some areas in the south, west, and extreme north.

February to May: Part of **the north and other high production areas** are expected to maintain **Minimal (IPC Phase 1)** outcomes between February and March. This will be enhanced by the green harvest which is expected at normal levels during this period. However, due to reduced or depleted own-produced stocks, some poor households will face limited food gaps, and will also be unable to meet their basic needs, resulting in **Stressed (IPC Phase 2)** food security outcomes. Between April and May, the green foods from the early planted crop will improve food security outcomes to **Minimal (IPC Phase 1)**. In the typically food-deficit **south, west and extreme north**, the peak period of the lean season will result in **Crisis (IPC Phase 3)** food security outcomes between February and March. Markets will serve as the most common source of cereal, mainly maize meal, which is priced higher than maize per unit, affecting access for poor households. However, the main harvest from between April and May will

result in mainly **Stressed (IPC Phase 2)** outcomes, with a few significantly improved areas experiencing **Minimal (IPC Phase 1)** outcomes.

AREAS OF CONCERN

Beitbridge South Western Lowveld Communal (BSWLC) Livelihood Zone (ZW02), Mangwe District (Matebeleland South Province)

Current Situation

The BSWLC LZ mainly falls under Natural Region V, a low-lying drought-prone region characterized by very low and erratic rainfall (less than 450 mm of average annual rainfall), high temperatures, thorny bushes and mopane trees. Livelihoods are primarily agropastoral. There is low potential for cereal crop production (very poor yields) and high risk of crop failure. Crops produced include millet, sorghum, maize, cowpeas, groundnuts and watermelons. Produced crops are predominantly for own-household consumption, and usually last for a few months, leaving most poor households dependent on markets and other sources of food. Potential for livestock production is medium to high. Main livestock kept in the zone are cattle, donkeys, goats and chickens. Additional information on the major characteristics of the BSWLC livelihood zone can be found in the [Zimbabwe Rural Livelihood Baseline Profiles](#).

Figure 6. Reference map for BSWLC Livelihood zone.



In Mangwe District, 2016/17 cereal production was significantly higher than the last two consecutive drought years and sorghum, pearl millet and maize production was above the five-year average (**Figure 7**). Nonetheless, the district is unable to meet the annual cereal requirements for the population of 70,000 people. Most areas that compose this zone are marginal production areas with poor soil and low annual rainfall. In a normal year, poor households usually produce only 2-3 months of cereal supplies for consumption. According to the recent 2017/18 2nd Round Crop and Livestock Assessment report by the Ministry of Agriculture, Mangwe District's total cereal self-sufficiency for this consumption year is between 10-12 months. However, FEWS NET's field assessment in September indicated that most of the cereal production was mainly in A1, A2, and commercial farms in Ward 11, as well as mixed communal and resettlement areas partly in Ward 12. Outside of these areas, most very poor and poor households produced enough cereal to last about 4 months (May to September). Factors that affected crop yields during the 2017/18 season included fertilizer shortages, above-normal seasonal rainfall leading to extensive soil leaching, fall armyworm, and quelea bird attacks.

During FEWS NET's field assessment, there was no maize grain in markets across the district, including in Plumtree Town. The only place with maize grain was the GMB depot in Plumtree. Commercial maize grain prices were \$22.25/50 kg and the subsidized prices for registered vulnerable households was \$15/50 kg. Household demand for maize grain at this depot in Plumtree was low because of long distances and high transport costs. Small grains were also very difficult to find in most markets. Only a few households were selling pearl millet to meet critical household needs. In contrast, maize meal was available in most markets, selling between \$5-\$7/10 kg. Demand for maize meal was increasing as most poor households exhaust their own-produced cereal supplies.

Though the water availability situation has begun to deteriorate in parts of communal wards in the district, the overall situation was much better compared to same time during the past two drought years. There was no flowing river or stream across most of the communal wards, which is typical. There are also very few natural ponds. Earth dams are supplying most of the water for livestock and livelihoods purposes (gardening, construction, etc.). Boreholes are the main sources of water for drinking, cooking, and for livestock use. The major dams in Mangwe District are in Ward 11, mainly Mangwe, Mhlanga and Chevakadzi Dams. The only large dam in the communal areas is Ngwizi Dam (Ward 5) which supplies ARDA Ngwizi and Ngwizi Growth Point.

Pasture conditions for large stock (cattle and donkeys) was fair but deteriorating in the communal wards of the district. This is more so in the southern-most and driest wards (Wards 8, 9, 10, 16 and 17). Despite good 2016-17 rainfall season, veld quality was mainly poor as it had not fully rejuvenated following consecutive drought years. Across most communal wards, veld management is said to be poor, characterized by extensive areas of poor or no ground cover, and bush encroachment. Veld resources for small stock, especially goats, is mainly good since they are predominantly browsers. Whereas large stock conditions were mainly fair, and conditions of small stock was good.

Social safety-nets through the Department of Social Welfare are supporting close to 1,800 households in Mangwe District under the Harmonized Cash Transfer Program. The transfers are bimonthly, and a one-person household receives \$10 per month, \$20 for a 2-member household, and \$25 for 3-member and above households. The Amalima program, a USAID consortium, is supporting pregnant and lactating mothers and children under two years with supplementary feeding. Pupils (Grades 0-3) in all primary schools are being covered under the National School Feeding Program.

Current Food Consumption: In September, some poor households were still consuming

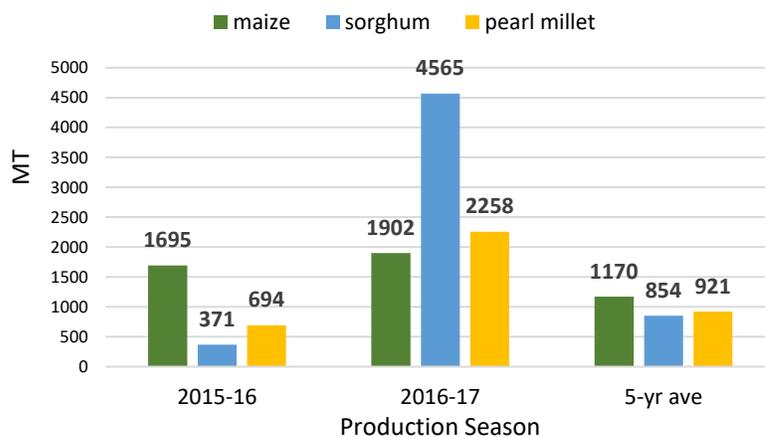
their own-produced cereals, which are mainly pearl millet-based in this area. The main staple food or *isitshwala*, vegetables, and sometimes cowpeas. Consumption patterns for poor households is mainly two meals per day, with middle and better-off households taking up to three meals. Own-produced cereal stocks are expected to last until late September or early October. As stocks begin to dwindle for the majority, an increasing number of households will begin to rely more on maize meal purchases. Some very poor and poor households are also drinking tea with sugar, but mainly without bread, as is the case for middle and better off households. Some poor households are also consuming goat milk. Middle and better-off households that own cattle are consuming cow's milk, as well as other cereals such as rice, wheat flour products, meat, eggs, and a wider variety of vegetables. *Amacimbi* (Mopane worms) are also being consumed with *isitshwala* by the middle and better-off households.

Current Livelihoods Change: Good rainfall last season enhanced water availability for vegetable production in a few areas in the district. Local demand for vegetables is always present in most communal wards. Based on focus group discussions conducted by FEWS NET in September, households indicated that the production of *amacimbi* this year was reduced because of above average rains and invasion by outsiders. Normally households in this area harvest and sell *amacimbi* for cash, however due to the national cash shortages the Mopani worms are being bartered for grocery items, utensils, and clothes. Cash shortages have also affected other livelihood options in this livelihood zone. Demand for commercial brick molding is atypically below average due to the reduced remittance levels. Recipients of remittances from South Africa are typically middle and better-off households that use the cash to hire labor. This affects poor households who typically depend on these household groups for labor opportunities. In-kind payments, e.g. in the form of cereal or other crops, is largely uncharacteristic in the zone due to low crop production. Livestock sales are also limited because the number of buyers is much lower than normal. Some buyers are also bringing items to barter instead of purchasing livestock with cash. Petty trading has also been affected due to general lack of capital and reduced demand for personal and household items. The viability of some savings and lending clubs (mostly dominated by women) has also been affected by prevailing liquidity challenges. This source of income had reportedly cushioned participant households who would use the proceeds to buy food and meet other basic household needs. Demand for on- and off-farm casual labor and self-employment activities has been below average, while labor supply is high and increasing.

Assumptions for Beitbridge South Western Lowveld Livelihood Zone

In addition to the national-level assumptions, the most likely scenario for poor and very poor households in this livelihood zone are based on the following assumptions:

Figure 7. Mangwe district crop production trends.



Source: Min. of Agriculture, Mechanization and Irrigation Development

Household-level cereal availability: A significant proportion of households in the communal areas harvest very little, and some did not harvest anything. Average own-produced cereal stocks were estimated to last for four months (May-September) for most poor households. Once stocks are exhausted by end of September, most poor households will begin to rely fully on market food purchases. Own-produced stocks for most middle and better-off households are expected to last at most until January.

Food availability in local markets: Maize grain is expected to continue to be unavailable across all markets in the area. The only source of maize grain will be the GMB depot at Plumtree. Unfortunately, this market is too distant for remotely placed households in the district and transport costs are prohibitive. Small grains are also expected to be largely unavailable on the markets, except for small quantities traded at farmer-to-farmer level mainly distress sales. As usual, the district is not expected to receive externally sourced or supplied maize and small grains throughout the outlook period. As usual, maize meal will constitute the main source of cereal from October onwards. Imports will be largely informal flows that are typical along border-line wards. Shortages of some basic food commodities such as cooking oil may be expected in line with the national situation. Significant price increases are expected for some of these commodities.

Integrated maize grain, maize meal, and small grain price projections: Maize grain supplies are not expected to be available in markets until the 2018 harvest. During the months of April and May, maize prices are expected remain constant and around 10 percent below the five-year average. During the entire outlook period, small grain prices are expected to be below-average. Maize meal prices are also likely to take a typical trend, influenced by national supplies of grain to millers. Prices are expected to marginally increase in October as demand increases. However, peak prices will remain below average. Maize meal prices are expected to range between \$0.5 to \$0.7/kg, depending on brand. The GMB itself will be a main player, availing maize meal to wholesalers, retailers and individual households. The GMB's "Silo" brand will likely continue to be the cheapest brand.

Social safety-nets: The government programs are likely to continue assisting vulnerable households during the outlook period. The Harmonized Cash Transfers program will reach up to about 1,800 households. The national school feeding program is likely to continue and targets children in Grades 0-3 in all primary schools. Pregnant and lactating women and children under five will continue to be assisted and provided supplemental feeding through the Amalima program. The national crop input scheme for 2017/18 is also expected to target farmers in this area.

Amacimbi (Mopani worm) availability: The area is well known for this local and national delicacy as these worms are harvested from trees common in the zone. The harvest is usually in December and again in May. The seasonal rainfall forecast for the area will largely impact the availability of worms during those key months. Below average rains will likely result in below average *amacimbi* harvest for the area.

Humanitarian assistance: FEWS NET assumes humanitarian assistance is planned, funded, and will likely occur during the outlook period. WFP has confirmed plans to target some 10,000 beneficiaries with cash transfers in November and December, however the cash value is yet to be established. The number of beneficiaries will be increased to about 13,100 for the January-March 2018 period. The government is reportedly targeting about 4,200 households and distributing 50 kg of maize per month between October and December 2017, and the number of households is expected to increase to 11,200 between January and March 2018.

Most Likely Food Security Outcomes

Most poor households are expected to experience poor food consumption and face livelihood protection deficits during the period October 2017 to January 2018 because their own-produced food stocks will be exhausted and very few households will be able to afford to purchase food in local markets due to below-average incomes. Livestock sales and bartering are expected to be below normal levels due to cash shortages. Remittance levels are also expected to continue to be depressed during this period. Given the seasonal rainfall forecast for normal to below normal rains, livelihood activities including gardening and construction may be limited as well. Water availability for livelihood options such as gardening, and construction among others may be a challenge given the rainfall forecast. Poor and very poor households are likely to face **Crisis (IPC Phase 3)** outcomes from October 2017 to January 2018. The past two consecutive years of drought and poor production have reduced poor household resilience. Humanitarian assistance from October-December will not change overall outcomes. **IPC Phase 2! Or Stressed** outcomes are projected from January through March because humanitarian assistance during this period will be

enough to improve area outcomes. The green harvest will also enhance consumption for some households during this period. Between April and May, the main harvest is expected to start, and this will improve outcomes to **Stressed (IPC Phase 2)** after humanitarian assistance ends in March.

Mwenezi Chivi South Midlands Communal Livelihood zone (MCSMC), focus on Mwenezi District, Masvingo Province

Current Situation

This zone is situated in the Lowveld in south-central Zimbabwe. It encompasses communal lands in several districts including Mwenezi, Chivi, southern Mberengwa and southern Zvishavane. The area is classified as Natural Region V. Annual rainfall is low, around 500-600mm, and soils are poor and prone to erosion. Despite being better suited for animal husbandry, crop production is dominant. The key to food security in this zone is the capacity of households to earn enough cash to purchase food during the year. Livelihoods in this zone depend on crop production, livestock production, casual employment (e.g. at the Mwenezana Estates, and in the local community) and remittances, as well as, to a small extent, on gold panning. The area is resource-poor and chronically food insecure. Consequently, humanitarian assistance is distributed with regular frequency in this zone (an estimated 4-7 out of every 10 years). Additional information on the major characteristics of the zone can be found in the [Zimbabwe Livelihood Zones Profile](#).

Figure 9. Reference map for MCSMC Livelihood zone.



The 2016-17 cereal production in Mwenezi was above average, mainly due to above-average rains and the contribution of wards that have resettlement farms (Wards 17,16,15,14,13). The Ministry of Agriculture reported that Mwenezi maize production was estimated at 13,725 MT, which is 239 percent above the district's five-year average and approximately 34 times the size of last season's poor production. Main season production was enough to meet the annual cereal needs of the entire district, with some surplus. However, some communal wards that are part of MCSMC experienced below average production. Wards 1, 3-7, 11, 12 and 18 were estimated to have cereal deficits this consumption year. On average, production in the livelihood zone is adequate for about seven months of the consumption year, leaving five months of reliance on market purchases. Based on FEWS NET's recent field assessment, most of the poor in this zone harvested enough to supply household consumption for about four months (May-August).

Current Food Consumption: Based on FEWS NET's field assessment in September, food consumption patterns for poor households were generally poor in the livelihood zone. Households were consuming about two meals a day comprised of staple *sadza* and vegetables or cowpea leaves. Some households were receiving cowpeas through social safety-net assistance. Pulses, including groundnuts, roundnuts, as well as *marula* nuts were also being consumed in small amounts by some households.

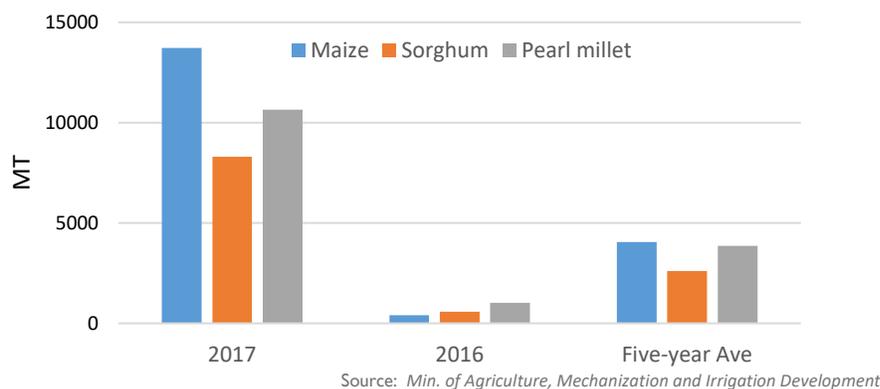
Current Livelihoods Change: Livelihood activities in the zone included the selling of vegetables, crop sales (mainly groundnuts, roundnuts, and small grains), as well as the sale of small livestock. Due to the cash challenges being faced by the households, these livelihood activities are mainly yielding bartered commodities instead of cash payments. A bundle of vegetables was being bartered for a cup of *marula* nuts, used clothes for a plate of cereal, a bundle of thatching grass for 4kgs of cereal in some areas. A limited number of households participated in brick-molding and beer brewing activities because of the effect of cash shortages. There were also reported occurrences of temporary labor migration to resettlement farms to work for food or to orange farms in South Africa in search of labor opportunities and cash. Based on findings from the September focus group discussions conducted by FEWS NET, the food security situation has deteriorated for poor and very poor households and livelihood options in this area have been adversely affected by national cash shortages.

Assumptions for Mwenzi Chivi South Midlands Communal Livelihood zone

In addition to the national-level assumptions, the most likely scenario for poor and very poor households in this livelihood zone are based on the following assumptions:

Household-level cereal availability: In a normal year in this area, own-produced stocks account for 60 percent (or approximately 6 months) of the food needs for a poor household. Usually for the remaining six months households must depend on in-kind wages from labor and food purchases. This consumption year, households are expected to be able to consume own-produced stocks until October. Afterwards, households will likely need to make food purchases or find labor for cash or in-kind payment. By January/February, consumption of green crops is expected and should supply food through about mid-March. Green consumption will ease the amount of grain households will need to purchase. From April through May, cereal availability levels should improve as the main harvest starts.

Figure 10. Mwenzi district crop production trends.



Integrated maize grain, maize meal, and small grain price projections: Maize grain prices for the projection period will likely be about 20 percent below average and 10 percent below last year's price due to above-average supplies and the current low grain prices. Maize meal prices will likely follow the same trend and be stable throughout the scenario period. Small grains tend to cost more than maize during the peak lean season period (November to February) and this trend is expected this year as well. Cereal prices will be lower than average because supplies are much better this year in comparison to previous years. Prices will likely peak during the period of January through March 2018.

Social safety-net programs: Government programs including the Harmonized Cash Transfer program are likely to continue assisting vulnerable households during the outlook period. The national crop input scheme for 2017/18 is also expected to target farmers in this area.

Humanitarian assistance: FEWS NET assumes humanitarian assistance is planned, funded, and will likely occur between the outlook period. Assistance from WFP through its implementing partners is planned and likely for the month of December for the district. Lean season assistance is planned to start with about 13,400 beneficiaries which will likely be increased to 25,500 beneficiaries from January through March 2018. The beneficiaries will likely receive 10kg cereal and 2kg pulses per person per month, as well as a cash transfer of \$1.90 for vegetable oil. This food basket will likely meet 80 percent of the 2,100 kilocalories requirements. The government plans to provide 6,950 households from October through December in Mwenzi district with 50kg cereal per household per month, which is likely to be increased to 8,100 households from January through March.

Most Likely Food Security Outcomes

Food consumption patterns for poor households from October through January will likely worsen from the current situation. The number of meals may remain the same (two meals per day), but the consumption of pulses will dwindle, affecting their dietary diversity. With the advent of the lean season in November, household energy needs will increase in line with increased on-farm activity, and this may lead to increased food gaps. **IPC Phase 3 or Crisis** area outcomes are expected between October 2017 and January 2018. Food assistance is planned, funded, and likely to start in December and will only ease the burden for a few households or less than 20 percent of the group of concern. Between October and January, most households will also have difficulty meeting other basic household needs.

IPC Phase 2! Or Stressed area outcomes, in the presence of humanitarian assistance, are projected for February-May 2018. The green harvest (pumpkins, maize, a variety of fruits and vegetables etc.) in February will boost household food consumption patterns (dietary diversity and number of meals consumed per day), though some households will still be unable to meet their minimum energy needs. At the same time, most poor households will still experience livelihood protection deficits between February and May. Incomes from most livelihood sources will continue to be below average, partly because of the economic challenges.

EVENTS THAT MIGHT CHANGE THE OUTLOOK

Table 3. Possible events over the next eight months that could change the most-likely scenario.

Area	Event	Impact on food security outcomes
National	Above average levels of humanitarian assistance	- Expected improvement in outcomes for populations projected to be in Phase 2 and Phase 3
National, but mainly in the south, west and extreme north	Rapid increase or spike in food prices	- Increase in the size of the population projected to be in Phase 2 and Phase 3 - Deterioration of outcomes among populations previously projected to be in Phase 2 and Phase 3

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.](#)