USAID FROM THE AMERICAN PEOPLE

FEWS NET FAMINE EARLY WARNING SYSTEMS NETWORK

ZIMBABWE Food Security Outlook January through June 2011

Key Messages

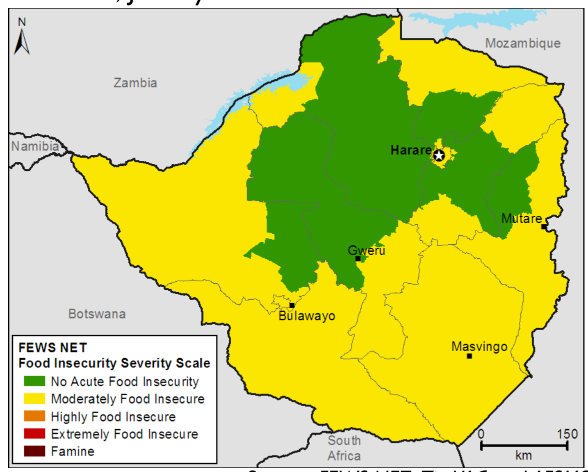
- About 1.7million people are estimated to be food insecure during the current peak lean season running from October through February. About 400,000 of the food insecure people are estimated to be in urban areas and those in the rural areas are outside of the central districts and are classified to be moderately food insecure. Food assistance program plans for the period of January through to March should be sufficient to cover the assessed needs.

- Despite farmers facing limited purchasing power to acquire inputs and the usual draft power shortages, the summer agricultural season performance in the first half of the season (October to December) was similar to last year and was better than the average performance for the past five years.

- The production forecast for the remaining half of the season remains optimistic. Consequently, most parts of the country will get the usual break from the peak lean season by the end of February following the start of the green harvest. Food stocks will be replenished with the coming of the main harvest from April through June.

- Despite the positive impact of food assistance programs, the initiation of the 2011 harvest, and the generally positive economic outlook for the whole of 2011, there are some worrying developments for the food security situation in Zimbabwe. Since food imports will continue to be a significant component of Zimbabwe's food supply in the outlook period, and a marked proportion of Zimbabweans rely on markets for their basic needs, global food and fuel price trends are likely to impact the purchasing power for very poor and poor households. Another worrying development is the poor rainfall season quality experienced in the southern districts of Masvingo and Matabeleland South provinces during the October to December half of the summer cropping season. Not only is the green harvest likely to be delayed and small, but the summer harvest may even be substantially lower than last year's.

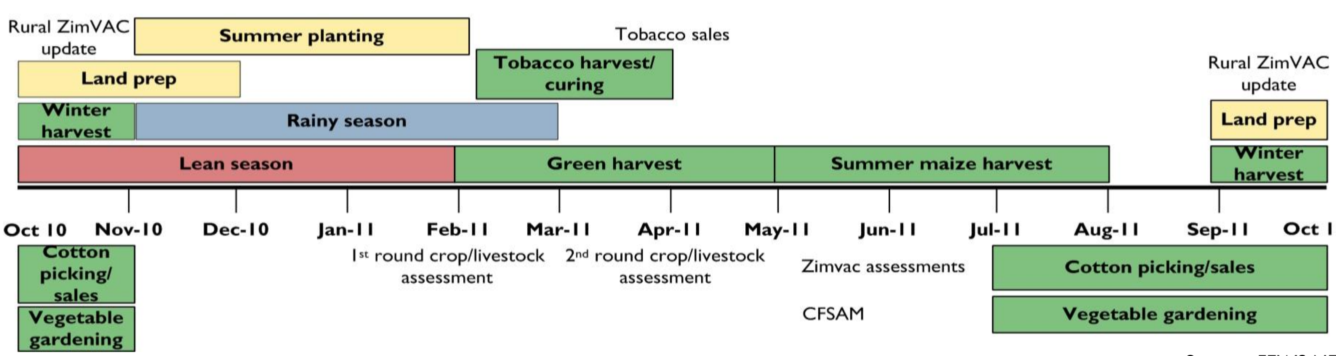
Figure 1. Current estimated food security outcomes, January 2011



Source: *FEWS NET, ZimVAC, and AFSMS*

For more information on FEWS NET's Food Insecurity Severity Scale, please see: www.fews.net/FoodInsecurityScale

Seasonal calendar and critical events timeline



Source: *FEWS NET*

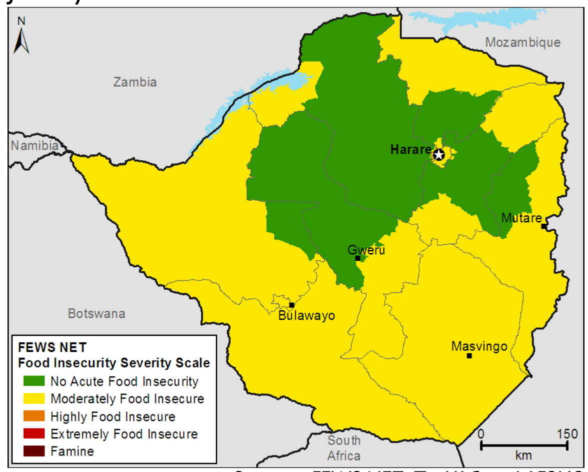
FEWS NET Zimbabwe
Harare
Tel: 263-4-744894/744878
zimbabwe@fews.net

FEWS NET Washington
1717 H St NW
Washington DC 20006
info@fews.net

Most likely food security scenario, January through March 2011

The general food security situation in both rural and urban areas of Zimbabwe has been generally stable as a result of a stable economic environment, stable food supply on the market, and food assistance to rural households in need by the Government of Zimbabwe and the humanitarian community. The Zimbabwe Vulnerability Assessment Committee (ZimVAC) estimated that about 1.3 million rural households will be food insecure between January and March. The Food and Agriculture Organization (FAO)/World Food Programme (WFP) Crop and Food Supply Assessment Mission estimated that an additional 400,000 people in the urban areas will not be able to meet their food needs in the 2010/11 consumption year. This brings the estimate of food insecure people in Zimbabwe to roughly 1.7 million. While the availability of food is not a constraint to food access, limited purchasing power continues to restrict the ability of very poor and poor households to access enough food.

Figure 2. Most likely food security outcomes, January-March 2011



Source: *FEWS NET, ZimVAC, and AFSMS*

For more information on FEWS NET's Food Insecurity Severity Scale, please see: www.fews.net/FoodInsecurityScale

The urban food insecure households are mostly concentrated in peri-urban areas and high-density suburbs. Outside of the urban areas, the food security areas of concern through the end of the lean season in February include: Beitbridge, Gwanda, Matobo, Mangwe, Bulilima, Hwange, Kariba, Binga, Chiredzi, Chivi, Zaka, Gutu, Bikita, Buhera, Chimanimani, Nyanga, Rushinga, Mudzi, and Mberengwa. These areas also have projected low acute malnutrition levels over the outlook period. The Zimbabwe Nutrition Survey in the 2009/10 consumption year, a consumption year similar to the current one, found acute malnutrition levels in Zimbabwe's 60 rural districts to average 2.1 percent and range between 0.1 percent and 5.2 percent. However, the National Nutrition Survey in 2010 found chronic malnutrition levels (measured by stunting levels) to be at the medium to high levels according to the World Health Organization (WHO) standards. This situation is expected to persist throughout the outlook period. According to the ZimVAC projection for the 2010/11 consumption year, in the January to March outlook period these districts are likely to experience a relatively high prevalence of food insecure people due to low household level purchasing power. These districts recorded maize grain prices ranging between USD 0.30/kg and USD 0.57/kg against a national average of USD 0.29/kg in December. Income indicators such as livestock-to-maize terms of trade and casual labor opportunities in these areas were lower than expected and in some cases their contribution was decreasing between November and December.

Food assistance programs ranging from general vulnerable group feeding to special targeted feeding by the government and the humanitarian community have plans to cover about 1.6 million people between January and March. The government will be supporting cash for work programs whilst the humanitarian community will be distributing food aid. While these plans appear adequate to cover the assessed needs, particularly in the rural areas, it is critical to monitor pipe line supply performance in the outlook period.

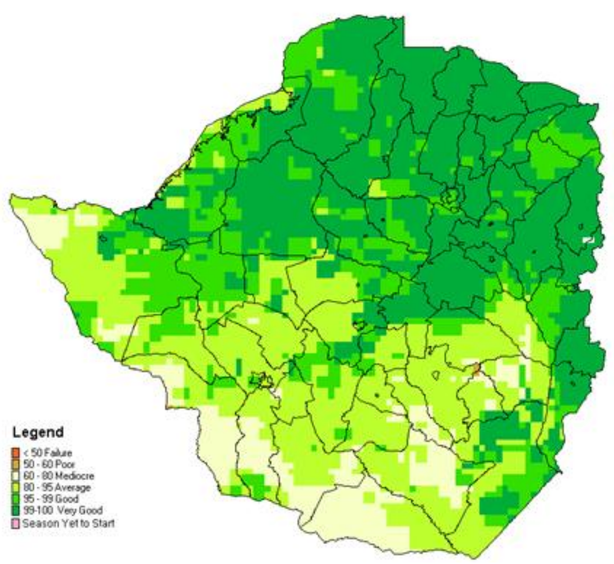
Most likely food security scenario, April through June 2011

From mid-February, most areas of the country, including urban areas, are likely to start accessing the green harvest from their fields, and from April to June, the summer harvest is likely to add to most household food stocks. Regardless of some input access challenges farmers faced at the beginning of the season, the performance of the first half of the summer season has been similar to that for last year in most parts of the country and even better than last year in some southern districts of the country (Figure 3).

The forecasted performance of the second half of the season running from January to March is favorable with increased chances of normal to above-normal rains expected. Last summer season's cereal harvest was above the recent five-year average by about 30 percent. Cotton production, a major cash crop for smallholder farmers, was near the average. The other import cash crop, tobacco, which smallholder farmers in the agro-ecological regions of the Mashonaland, Manicaland,

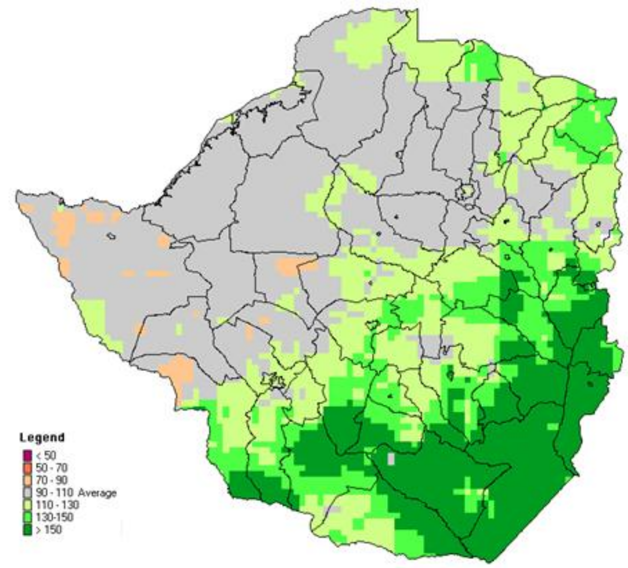
and Midland provinces rushed to produce due to better returns in the previous year, experienced almost double production compared to the preceding year. Production of this crop is expected to increase by over 30 percent from last year's harvest of about 125 million kilograms.

Figure 3a. Forecast Maize Water Requirement Index (WRSI) for 21 January-31 March 2011



Source: *USGS*

Figure 3b. Forecasted WRSI for 21 January–31 March compared to the same time last year

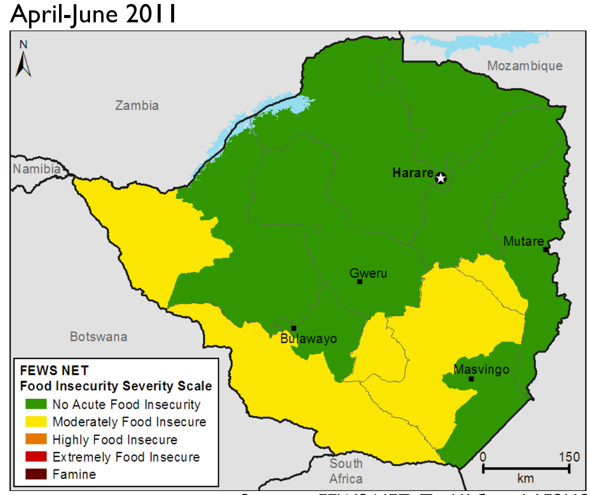


Source: *USGS*

Therefore, in March to June, the prevalence of food insecure households is expected to decrease to its usual low levels mainly on account of the positive summer crop harvest. The 2009 and 2010 ZimVAC Rural Food Security Assessments estimated that about 200,000 rural people were to be food insecure between April and June and these were mostly people from very poor households that were labor constrained for various reasons that include: being chronically ill, elderly, and/or child headed. Special targeted food assistance programs that usually continue when general group feeding stops in April are expected to continue benefiting most of these people, and local community safety nets are likely to fully complement these initiatives. No areas of concern are therefore anticipated in the April through June outlook period. While acute malnutrition levels are likely to remain low and chronic malnutrition levels are likely to be in the medium to high levels, the prevalence of food insecure people in these areas is likely to be above 10 percent as a result of reduced crop output due to a mediocre rainfall season experienced in the October to December period.

Throughout the outlook period, increases in world food and oil prices are of concern given their direct impact on the food security situation in Zimbabwe. While staple cereal prices and the general cost of living for low-income households have been stable for most of the current consumption year, these indicators have shown some signs of increasing in the last two months. The November year-on-year inflation rate measured by the Zimbabwe Central Statistical Office (CSO) increased by 0.6 percent from the October rate of 3.6 percent. The low-income urban earner's monthly basic basket for December monitored by the Consumer Council of Zimbabwe (CCZ) was two percentage points higher than it was at the same time last year (Figure 5). Both average rural and urban market maize grain prices for December were higher than they were at the same time last year. The sustained strengthening of

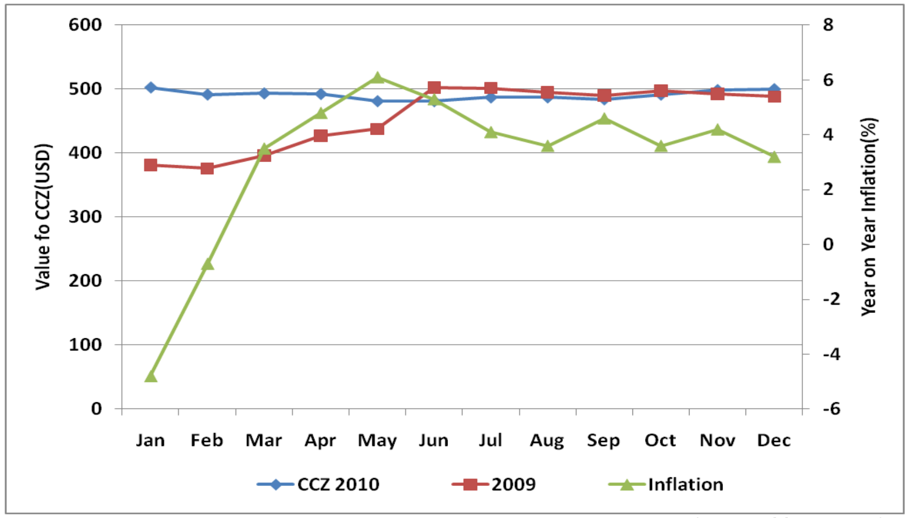
Figure 4. Most likely food security outcomes, April-June 2011



Source: *FEWS NET, ZimVAC, and AFSMS*

For more information on FEWS NET's Food Insecurity Severity Scale, please see: www.fews.net/FoodInsecurityScale the South Africa Rand (SAR) against the United States Dollar (USD) could worsen price trends, particularly for foods such as maize, chicken, sugar, and cooking oil which Zimbabwe imports from South Africa. These developments are likely to exert additional pressure on the purchasing power of very poor and poor households that are dependent upon the market for their food needs.

Figure 5. Trends on the CCZ and ZimSTAT Inflation in 2010



Source: *CCZ and ZimSTAT*

Table 1: Less likely events over the next six months that could change the above scenarios

Area	Event	Impact on food security outcomes
National	Government initiating restrictions on private sector trade of staple cereals	If the government restricts private sector trade of staple cereals, availability of staple cereals is likely to go down in rural markets resulting in increased prices thus reducing household access.
Districts of Matabeleland South	Livestock disease outbreak affecting cattle, goats, and poultry	Possible livestock disease could drastically reduce livestock holdings for over 70 percent of households in these areas who consider cattle, goats, and poultry sales as a major source of income. Furthermore, the terms of trade between livestock and staple cereals could turn in favor of staple cereals for these cereal-deficit households.
National	Reversal of importation regulations	If the waiver on import duty for basic commodities is dropped, access to food commodities might be a challenge for poor rural and urban households with limited disposable incomes.
National	Campaigns and elections planned for mid-2011	The campaigns could impact the general population in a variety of ways. On one hand the competing parties could work hard to be seen to be responsive to the food security concerns of the electorate by providing some food, the means to produce it, or the means to improve incomes. On the other hand, the campaigning period could be associated with violence that could hinder economic recovery resulting in reduced employment opportunities and incomes. Possible interference with humanitarian food assistance could reduce its effectiveness significantly in affected areas.