

Increasing non-staple food and other commodity prices further strain poor households' access to food

ABOUT THIS UPDATE

FEWS NET Food Security Outlook Updates in September 2018 have an extended outlook beyond the standard projection period. The end of this report includes a discussion of most-likely outcomes through the end of the next lean season for this country. Reporting for this country may follow a non-standard schedule in the coming months. Check back regularly for new analysis, subscribe for report updates, or follow us on social media.

KEY MESSAGES

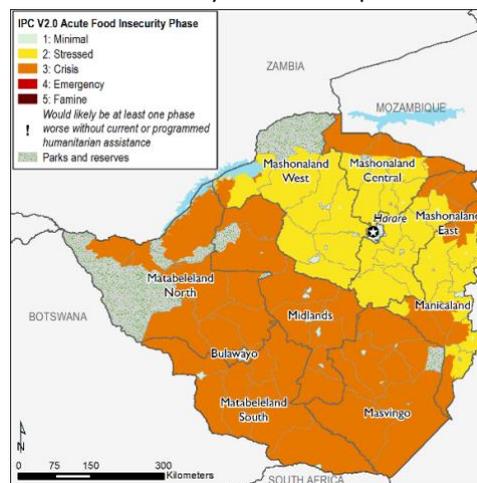
- Most deficit-producing areas in the south, west, and extreme north are currently in Crisis (IPC Phase 3) as poor households have depleted their own-produced food stocks. Crisis (IPC Phase 3) food security outcomes resulting from a poor 2017-18 cropping season and macroeconomic hardships are expected to persist throughout the 2018-19 lean season. In typical surplus-producing areas in the north and other places, mainly Stressed (IPC Phase 2) outcomes are expected, though some poor households will be in Crisis (IPC Phase 3).
- Apart from staple cereals, prices of other food and non-food items continue to increase. Humanitarian assistance is anticipated from the government and humanitarian partners, but specific plans on the areas that will be targeted are still forthcoming. Poor households have started engaging and intensifying typical consumption and livelihoods coping mechanisms.
- An El Niño is expected for the 2018-19 rainfall season and the associated poor rainfall levels are likely to adversely impact seasonal on-farm casual labor opportunities and other income sources like livestock sales throughout the 2019 lean season.

CURRENT SITUATION

National Economy

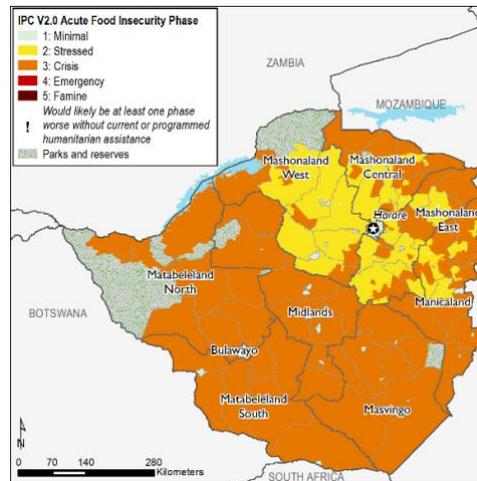
Liquidity challenges continue to affect most sectors of the economy in Zimbabwe. Foreign currency shortages in formal markets as well as reliance on black market supplies continue to affect production, prices, and service levels in the formal and informal sectors. High charge rates are being applied on non-USD modes of payments, increasing the prices of goods and services. The prices of most non-staple food items (e.g. cooking oil, salt, sugar, and bread) and essential non-food items continue to increase on the markets. This is in turn affecting poor households' food access due to low

Current food security outcomes, September 2018



Source: FEWS NET

Projected food security outcomes, October 2018 to February 2019



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.

and declining household incomes. Sugar and cooking oil prices have risen significantly compared to same time last year. Bread prices increased 10 percent by mid-September.

Food Security Situation

The proportion of poor households that have exhausted own-produced food stocks continues to increase mostly in typical deficit-producing areas, but also in some surplus areas. Most of the poor households in deficit-producing areas had own crop production that lasted between 0-3 months and are already facing food consumption gaps. These households are therefore engaging in consumption-based coping strategies such as reducing number of meals taken per day, reducing meal portions, and consuming less preferred foods as the 2018-19 lean season gets under way. Typical livelihood strategies such as casual labor, self-employment, petty trade, and remittances are being employed and intensified. However, due to the constrained economic environment, household incomes remain low, affecting poor households' access to food and other basic goods and services. Though humanitarian assistance is anticipated during the 2018-19 lean season, details on the specific areas that will be targeted are still forthcoming.

Agricultural Seasonal Progress

As the dry season progresses, water levels in rivers and dams continue to fall in most areas, but more so in typical arid parts of the country in the south, west, and extreme north. This dryness is affecting water availability and access for human and livestock uses, as well as for livelihood activities such as gardening, brick molding and construction. Livestock conditions are generally fair but deteriorating and pasture conditions continue to decline while crop residue is minimal or depleted, with veld fires worsening the situation in some areas. In some parts of the country, livestock diseases such as foot and mouth and Theileriosis (January disease) are compounding the situation.

Crop input assistance from the government started earlier than usual this year and targeted farmers are receiving seed and fertilizers. Although actual beneficiary figures cannot be established so far, the government is planning to provide maize/sorghum and cotton inputs to 1.8 million people and 400,000 households respectively through the Presidential Crop Input Scheme. Most farmers are yet to start on land preparation for the 2018-19 cropping season.

Trade and Market Functioning

The Grain Marketing Board (GMB) is still holding significant maize grain stocks, part of which are carry-over stocks from the 2016-17 harvest. Whereas the GMB is buying from farmers at \$390/MT, commercial millers are sourcing maize grain from the GMB at subsidized prices of between \$240-270/MT. In some areas private traders are reportedly offering immediate cash of \$150-200/MT to farmers, thereby short-changing farmers that are in desperate need of cash incomes.

Maize grain availability on the open or informal markets is lower than usual, and maize meal is more readily available in typical deficit-producing areas. In August maize grain prices averaged \$0.29/kg in FEWS NET sentinel markets, which was stable compared to July, whilst 17 percent above same time last year and 14 percent lower than the five-year average. The August average maize meal price (\$0.50/kg) also remained stable in comparison to July, but was slightly lower than same time last year (3 percent) and below the five-year average (16 percent).

UPDATED ASSUMPTIONS

Most assumptions discussed in the [June 2018 Zimbabwe Food Security Outlook](#) are still valid. In late August, the National Climate Outlook Forum (NACOF) for Zimbabwe released a forecast for normal to below-normal rainfall for the two halves (October to December and January to March) of the 2018-19 rainfall season. Prior to the release of the NACOF, in the June 2018 Outlook FEWS NET had assumed below-average rainfall with a high probability for a late start of rains and erratic spatial and temporal distribution for the Southern Africa region based on leading international climate agencies forecasts.

PROJECTED OUTLOOK THROUGH FEBRUARY 2019

September 2018: With depleted own-produced food for poor households in the south, west, and extreme north as well as poor livelihoods and household incomes, Crisis (IPC Phase 3) food security outcomes are expected during September. For

most such areas, this marks an earlier than usual start of the lean season. Usually, Stressed (IPC Phase 2) outcomes are experienced during this time of the year. In typical surplus-producing areas in the north and other localized areas, Stressed (IPC Phase 2) outcomes will prevail, though some poor households will be in Crisis (IPC Phase 3). Typical surplus-producing areas usually experience Minimal (IPC Phase 1) and Stressed (IPC Phase 2) outcomes at this time of the year because in some of these areas poor households typically realize 6-8 months of own-produced supplies—providing food up to November/December.

October 2018 to February 2019: Crisis (IPC Phase 3) outcomes will continue to prevail in typical deficit-production areas as the lean season continues. Typical seasonal on-farm labor opportunities will be constrained, especially with forecasted El Niño induced poor rains for the 2018-19 cropping season. Food purchases on the markets will be further limited due to anticipated high and increasing non-staple food prices. Seasonal price increases are expected for staple maize. Even though these price increases will be at below normal levels, they will limit household purchasing power, affecting access for poor households. Humanitarian assistance will be required to help poor households meet their basic food requirements and to save livelihoods. Most surplus-producing areas will continue to experience Stressed (IPC Phase 2) outcomes as poor households’ own stocks deplete, and as they experience challenges in meeting their other basic needs. However, some of the more critical areas are expected to experience Crisis (IPC Phase 3) outcomes and will also require humanitarian assistance.

SEASONAL CALENDAR FOR A TYPICAL YEAR

