FEWS NET
FAMINE EARLY WARNING SYSTEMS NETWORK

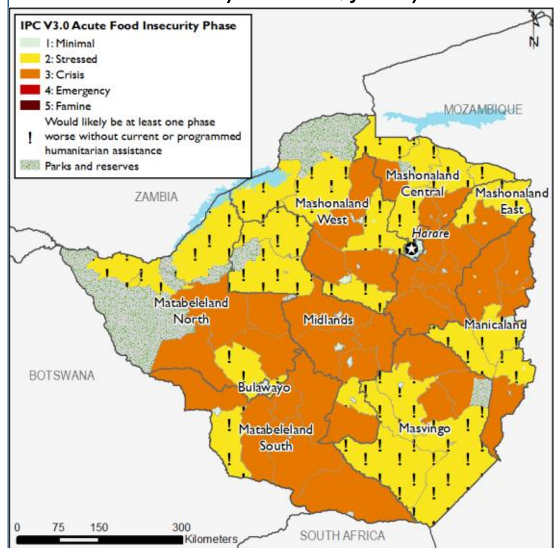
ZIMBABWE Food Security Outlook Update January 2020

Consecutive years of drought conditions expected to significantly impact crop and livestock prospects

KEY MESSAGES

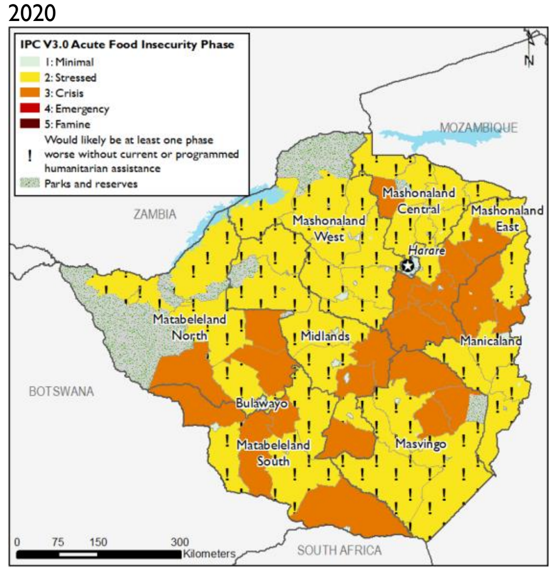
- As a result of the poor and volatile macroeconomic conditions, humanitarian assistance delivery mostly shifted modalities from a mix of cash and in-kind food assistance to purely in-kind assistance in late December. Despite the modality shift, funding shortfalls, and resultant delays in assistance distribution in January, Stressed! (IPC Phase 2!) outcomes are present in parts of the country. Areas not receiving significant levels of assistance or no assistance at allare currently experiencing Crisis (IPC Phase 3). Humanitarian partners have indicated plans to scale-up assistance beginning in February. As a result more areas will most likely be in Stressed! (IPC Phase2!). The anticipated below normal harvest in May/June is expected to drive Crisis (IPC Phase 3) outcomes in worst-affected areas.
- Rainfall in mid-January resulted in improved crop conditions in parts of the country, mainly across the Mashonaland Provinces, following prolonged dry spells. The rest of the country received little to no rainfall resulting in continued drought conditions in most areas. This has resulted in significantly below normal cropped areas, permanent and near-permanent crop losses, persistent water and pasture challenges, and continued cattle deaths. As of late January, a high proportion of farmers in some districts have yet to start planting. Fall Armyworm is being reported across most of the country with African Armyworm incidences reported in parts of the Midlands Province.
- Most markets across the country have very little to no maize grain and maize meal. Where maize grain is available, mostly in key urban markets such as Mbare in Harare and Renkini in Bulawayo, prices are significantly above average and unaffordable for poor households. Most commercial millers have not been producing maize meal as national maize grain supply is critical and also resulting from operational challenges experienced in the implementation of government's maize grain subsidy program. Limited stocks of maize meal are available on the black market but at exorbitant prices.

Current food security outcomes, January 2020



Source: *FEWS NET*

Projected food security outcomes, February to May 2020



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

After prolonged dry spells between October to December 2019, which ranked among the driest on record in most parts of the country, some northern surplus producing areas including the Mashonaland Provinces recorded significant rainfall in mid-January thereby decreasing rainfall deficits. Little to no rainfall was received through the end of January. The mid-January rains resulted in improved crop condition though cropped area remains significantly below normal. Some farmers' intent to replant or increase cropped area are being hampered by poor access to crop inputs. Short-season seed varieties are encouraged for late replanting; however, these are generally not available on the markets, or if they are, prices are not affordable for most households. There has been a slight improvement of water and pasture conditions in the

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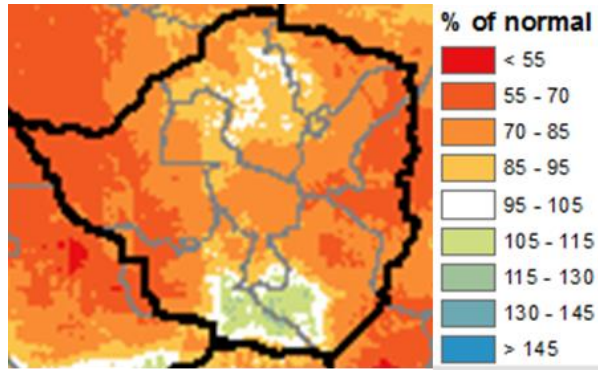
Mashonaland Provinces and surrounding areas following the mid-January rains. However, the prevalence of tickborne disease among cattle has also increased due to the wet spell and challenges in the availability and access to dipping chemicals.

Across most typical arid areas in Matebeleland North and South, Midlands, Masvingo, and Manicaland Provinces, predominantly dry conditions continue, resulting in increased rainfall deficits ranging between 15 to 45 percent below average. Any rainfall incidences in these areas have been highly erratic in space and time, and mainly showery. Cropped areas remained significantly below normal due to the dryness and poor access to crop inputs. By late-January, a high proportion of farmers in some districts had not yet planted. Total and near-total crop losses have been experienced in most areas. Water and pasture availability and access continue to deteriorate, and cattle deaths are still being recorded due to prevailing drought conditions, with Matabeleland South Province among the worst affected.

Figure 1. Rainfall anomalies as a percent of average for October 1, 2019 to January 25, 2020



Source: *USGS*

Fall Armyworm (FAW) has been reported in most districts across the country with some incidences of African Armyworm in parts of Midlands Province. Access to chemicals to control the pests is poor due to very high costs and significantly below average incomes. This will likely impact production; however, the extent of the damage has not yet been fully assessed.

Poor rainfall has also affected typical seasonal casual labor opportunities nationwide which remain well below normal. Causal labor availability is very high, and this is driving down labor rates, impacting poor households' incomes and access to food.

National maize grain supplies are critically low as a result of poor 2019 harvest and limited ability for imports. Additionally, maize meal availability is extremely limited across the country following operational challenges experienced following the December 2019 re-introduction of the maize grain subsidy program. Most commercial millers have stopped producing both unrefined and refined maize meal. Where available maize meal is being sold on the black market at prices beyond the reach of most poor households. The situation is of most serious concern in typical grain-deficit areas of the south and west where maize meal normally replaces maize grain as the primary purchased cereal. The supply of vegetables on the markets has also been very low especially in the southern and western areas, resulting in above-average prices beyond poor households' reach.

The poor macroeconomic environment continues to be one of the key drivers of food insecurity in both rural and urban areas. The parallel market exchange rates in US Dollar and ZWL Dollar terms continue to increase, influencing the prices of goods and services. Cash shortages in the formal markets continue to affect poor households as well as some middle and better-off households, especially as non-cash prices in the informal and parts of the formal sectors attract high premiums up to 50 percent above cash prices. Increasing fuel and transport costs are impacting livelihoods and access to food, mostly affecting poor households.

As a result of poor food access, some poor households are significantly limiting portion sizes or going for days without the preferred staple meal *(sadza)*. Other households are resorting to preparing just porridge or *maheu/amahewu* (cereal-based drink), which requires little portions of maize or other small grain meal. Typically, during the peak of the lean season, most poor households' basic food consumption comprises a meal or two of staple *sadza* and vegetables per day. The availability and consumption of seasonal wild foods and own-produced vegetables/relishes is poor across most parts of the country due to the dry conditions. There are reports of increases in borrowing and begging for maize and other grains among neighbors, relatives, and friends.

In December, WFP reached nearly 1.4 million people in 36 districts with cash and food distributions using a ration size meeting an estimated 62 percent of a household's daily kilocalorie needs. WFP indicated in late December the lean season assistance would shift modalities from a mix of cash and in-kind food to solely in-kind food assistance. This shift was a necessary result of the volatile and poor macroeconomic conditions; however, this also led to a delay in distribution of food assistance in some areas in January. WFP planned to distribute in-kind food assistance to slightly over 2.6 million people across all 60 rural districts in January. FEWS NET assumes areas that received significant assistance in December and January have improved household food consumption. As a result, these areas are in Stressed! (IPC Phase 2!). It is expected that since assistance is not reaching the entire population in need some households are still in Crisis (IPC Phase 3) in these areas. Areas that received insignificant or no assistance remain in Crisis (IPC Phase 3).

UPDATED ASSUMPTIONS

The assumptions used to develop FEWS NET's most likely scenario for the Zimbabwe Food Security Outlook for October 2019 to May 2020 remain unchanged, except for the following updates:

- Depending on the availability of resources WFP plans to scale up assistance from the 2.6 million in January to 3.5 million starting in February and most likely continuing through April. However, based on the shift in modality and some funding gaps, FEWS NET assumes distributions from February to April will reach at least 2.6 million people. Other humanitarian assistance partners are likely to have plans to distribute assistance in February to April; however, at the time of FEWS NET's analysis this information was unavailable.

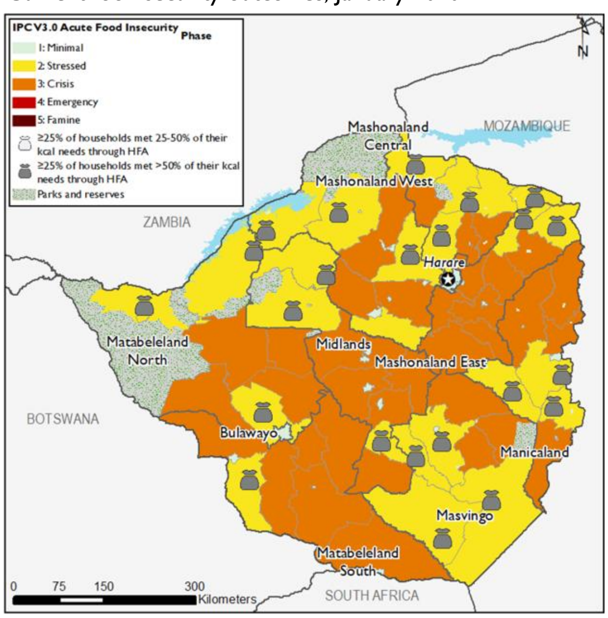
PROJECTED OUTLOOK THROUGH MAY 2020

Humanitarian assistance will most likely improve food security outcomes to Stressed! (IPC Phase 2!) in most areas of the country. However, it is expected that there will still be households in Crisis (IPC Phase 3) in areas that are receiving insignificant assistance. Starting in February/March the green harvest will likely become available and the main harvest will likely start in late-April/May although both are expected to be significantly below average. There are some households across the country that will most likely have no harvest at all as a result of the poor rainfall season as well as a lack of access to agriculture inputs. Following the main harvests in April/May, Stressed (IPC Phase 2) outcomes are expected in typical high-producing areas although own produced stocks will be limited. In typical deficit-producing areas, Crisis (IPC Phase 3) outcomes are expected in the post-harvest period due to significantly below normal harvests and as humanitarian food assistance is only expected to continue through April.

MOST LIKELY FOOD SECURITY OUTCOMES AND AREAS RECEIVING SIGNIFICANT LEVELS OF HUMANITARIAN ASSISTANCE*

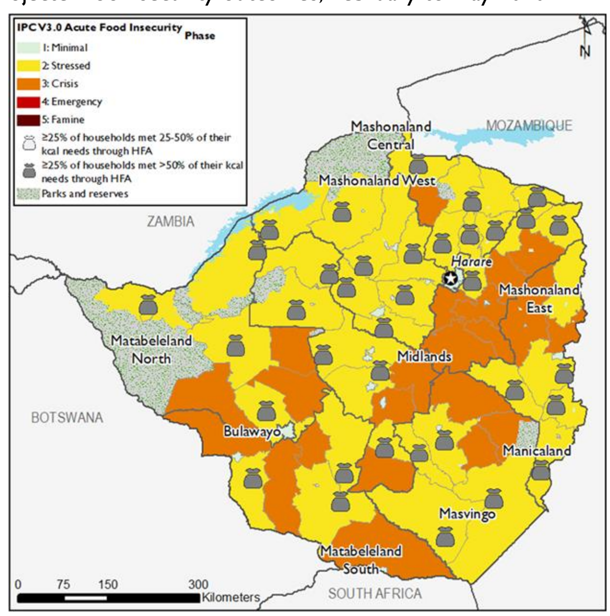
Each of these maps adheres to IPC v3.0 humanitarian assistance mapping protocols and flags where significant levels of humanitarian assistance are being/are expected to be provided. indicates that at least 25 percent of households receive on average 25–50 percent of caloric needs from humanitarian food assistance (HFA). indicates that at least 25 percent of households receive on average over 50 percent of caloric needs through HFA. This mapping protocol differs from the (!) protocol used in the maps at the top of the report. The use of (!) indicates areas that would likely be at least one phase worse in the absence of current or programmed humanitarian assistance.

Current food security outcomes, January 2020



Source: *FEWS NET*

Projected food security outcomes, February to May 2020



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ABOUT THIS UPDATE

This report covers current conditions as well as changes to the projected outlook for food insecurity in this country. It updates the FEWS NET's Food Security Outlook, which is published three times per year. Learn more about our work here.