

## Zimbabwe Food Security Outlook Update

May 2010

Food security conditions are stable with good harvests from the 2009/10 season

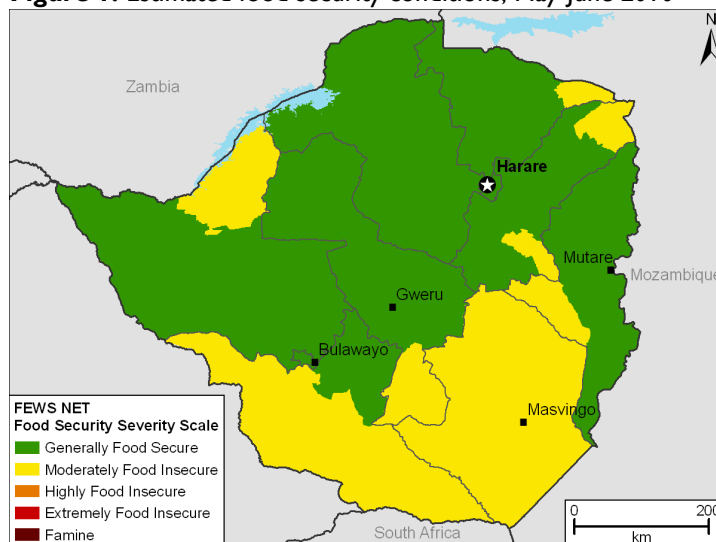
### Key Messages

- Staple cereals (maize, sorghum, and millet) are generally available throughout the country as a result of above average cereal production realized in the 2009/10 agricultural season. The supply of basic food stuffs on the market has remained stable. This condition is expected to prevail through to September 2010.
- Disposable income for the majority of poor urban households is likely to remain low given limited income generating opportunities and low wages. Access to food will remain suppressed for these poor households.
- Conducive market policy is likely to prevail throughout the outlook period; this will enable the continuous supply of basic commodities on the market. Domestic production continues to complement imports.

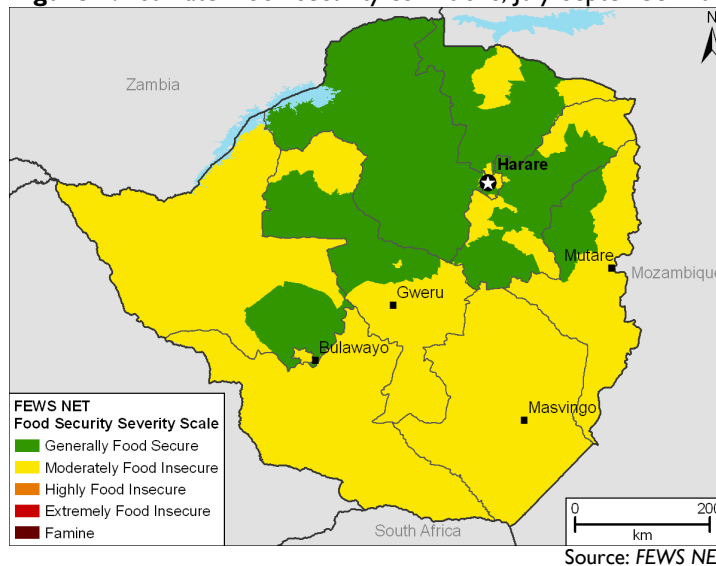
### Updated food security outlook through September 2010

The 2009/2010 harvest is slightly better compared to last year. As a result, the 2010/11 national cereal deficit is estimated at about 416,328MT (table 1), taking into consideration the opening stocks from the Grain Marketing Board, food aid, and formal imports. This deficit could be much lower if on-farm stocks and informal imports were accounted for. Given the significant support and contribution provided by the Government of Zimbabwe (GoZ) and humanitarian agencies in the past years, this cereal gap is likely to be closed. The current food security conditions are stable through September 2010 for most households; however poor and very poor households particularly in the grain deficit areas will require food assistance earlier than normal. The recently completed rural food security assessment by the Zimbabwe Vulnerability Assessment Committee (ZimVAC) will provide estimates for food insecure households in the 2010/11 consumption year.

**Figure 1.** Estimated food security conditions, May-June 2010



**Figure 2.** Estimated food security conditions, July-September 2010



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

*This report provides an update to the January 2010 FEWS NET Food Security Outlook report which estimated food security conditions in Zimbabwe through June 2010. The next Outlook report will be released in April and will cover the April to September 2010 period.*

According to the Second Round Crop and Livestock report (April 2010) the majority of districts in the northern part of the country that include the Mashonaland East, West, and Central provinces have enough cereal, on average, for 10 months. Though this does not suggest the absence of cereal deficit households within these areas, it is an indication that most households from these provinces will have sufficient food to last them at least throughout the April to September outlook period before turning to the market. The food security situation in the northern parts is therefore expected to be stable in both the April to June 2010 and July to September 2010 outlook periods (Figures 1 and 2).

In the Masvingo Province, the districts of Gutu, Zaka, Bikita, Masvingo, and Mwenezi experienced poor maize crop production which will only be sufficient for two to four months starting in May 2010. Most households in these areas will be food insecure by September 2010, requiring food assistance earlier than normal. If production had been good in these districts with the current harvest going on, poor households would have generated income from on-farm activities. Given the poor crop production, casual labor opportunities are very limited. These poor households with poor crop production and limited disposable income will face food shortages and access challenges through the July to September 2010 outlook period.

The rains received towards the end of the rainy season will promote gardening in most parts of the country including the Masvingo and Manicaland provinces. Most households are expected to engage in gardening as the main income generating activity. Income generated from gardening is also expected to be used to access cereals from the market by most households in these provinces. Cereal prices are expected to remain stable up to June and will go up as the onset of the hunger season approaches around August. The majority of households who engage in gardening are therefore expected to have better access to food compared to those with limited income generating options.

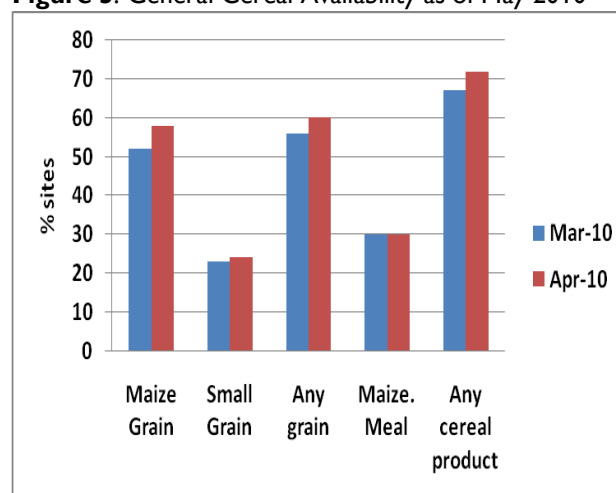
Generally cereals are available at the household level as well as in markets, especially in high crop potential areas in the northern and central parts of the country. This situation is expected to prevail through to September 2010. According to the Agriculture and Food Security Monitoring Systems (AFSMS, April 2010), over 70 percent of the sites indicated that cereal was available either as grain or flour. The supply of maize meal remained at the same level from March to April (Figure 3) and the same is likely to prevail through June as well as the July - September outlook period. In April 2010, monitored sites reflected that close to 36 percent of households were relying on cereals from own production, followed by purchases at 31 percent, casual labor at 19 percent, and food aid at 9 percent. It is anticipated that as the season progresses, household cereal stocks from own production will run out and purchases, casual labor, and food aid will contribute significantly to household cereal sources.

**Table 1. Cereal (Maize, Sorghum, and Millet) Balance Sheet, April 2010/March 2011, as of April 2010**

DESCRIPTION		MT
A	Human requirements	1,640,000
B	Livestock and other uses	350,000
C	Seed	40,000
D	<b>Total Annual Requirements (A+B+C)</b>	<b>2,030,000</b>
E	Production	1,521,460
F	Strategic Grain Reserves	45,000
G	Commercial imports (SAGIS)	19,952
H	Food aid imports	27,260
I	Opening stocks (F+G+H)	92,212
J	<b>Total Available Cereals (E+I)</b>	<b>1,613,672</b>
K	<b>Deficit (D-J)</b>	<b>-416,328</b>

Source: Ministry of Agriculture Mechanization and Irrigation Development, SAGIS, WFP, and C-SAFE

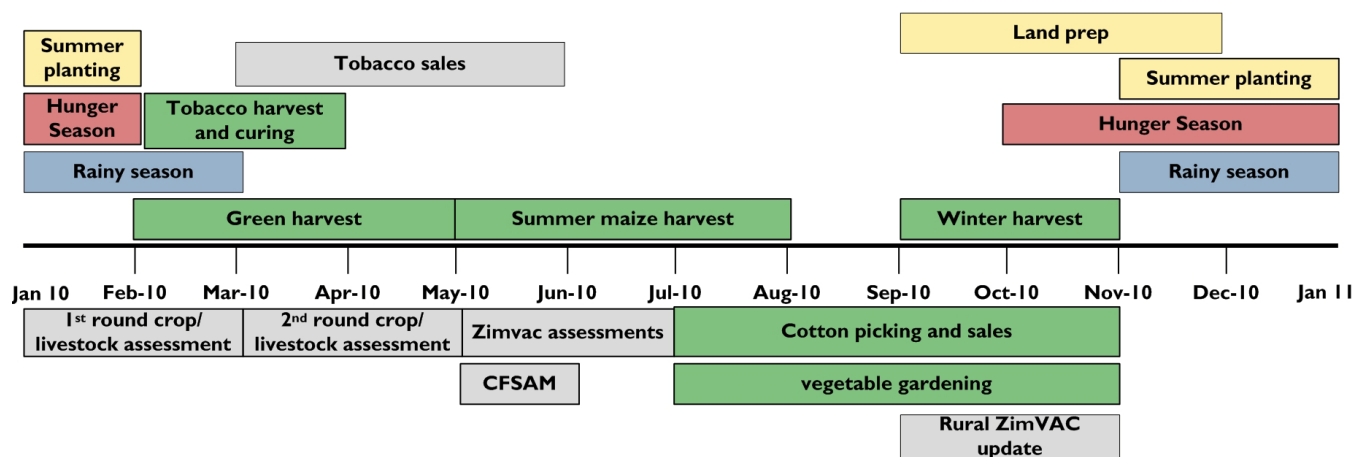
**Figure 3: General Cereal Availability as of May 2010**



Sources: AFSMS

Considering the better harvests experienced in the 2009/10 season, most poor urban households are currently food secure. However, income for the majority of poor urban households is likely to remain low given limited income generating activities and low wages. Access to food and non food will remain suppressed for these poor households through the July-September 2010 outlook period.

Seasonal calendar and critical events timeline



Source: FEWS NET



Maize grain, maize flour, cooking oil, and sugar represent the most important food commodities consumed by poor households. The Mbare market in Harare is where a very large percentage of the most vulnerable households procure their basic commodities.

Monthly prices are supplied by FEWS NET enumerators, local government agencies, market information systems, UN agencies, NGOs, and other network and private sector partners.

