



GIEWS Country Brief

The Republic of Zimbabwe

Reference Date: 18-October-2023

FOOD SECURITY SNAPSHOT

- Forecasts point to high probability of below-average rainfall amounts in 2023/24
- Official production estimates put 2022/23 cereal harvest at above-average level
- Food inflation in double digits throughout 2023
- Significantly high levels of food insecurity in 2023/24

Forecasts point to high probability of below-average rainfall amounts in 2023/24

Planting of 2024 cereal crops is expected start in November, with the harvest period beginning next April. There are significant concerns regarding cereal production in 2024, largely due to expectations of cumulatively below-average seasonal rainfall amounts, underpinned by the prevailing El Niño event. The weather outlook indicates high probabilities of below-average rainfall amounts between October 2023 and February 2024, which may adversely affect the extent of plantings and yields. The confluence of above-average temperatures, which are also forecast this season, raises the risk of heat stress on crops, a further factor weighing on production prospects.

With the aim to bolster production, the government is distributing agricultural inputs, including seeds of short cycle maize varieties and fertilizers, targeting 3.5 million beneficiaries. However, the persistent currency weakness and associated double digit inflation rates registered in 2023 are severely diminishing farmers' ability to purchase agricultural inputs and services, particularly those outside of support programmes.

A poor rainy season would also be expected to have negative impacts on livestock body conditions, due to the reduced quality and availability of pasture resources.

Above-average cereal harvest in 2023

Based on official figures, cereal production is estimated at an above-average level of 2.9 million tonnes in 2023, including favourable production prospects for the winter wheat crop that will be harvested by November. Production of maize, the main food staple, is estimated at an above-average level of 2.3 million tonnes in 2023, reflecting overall conducive weather conditions in the key producing northern provinces. However, localized shortfalls in cereal production occurred in southern and western

Zimbabwe

Crop Calendar

(*major foodcrop)



Zimbabwe

Cereal Production

	2018-2022 average	2022	2023 estimate	change 2023/2022
	000 tonnes			percent
Maize	1 530	1 550	2 300	48.4
Wheat	217	375	325	-13.3
Sorghum	123	144	160	11.1
Others	102	92	142	55.2
Total	1 972	2 161	2 927	35.5

Note: Percentage change calculated from unrounded data.

areas, where amounts and temporal distribution of rains were less beneficial for crops.

Based on the official cereal production estimates, national import needs in the 2023/24 marketing year (April/March) are foreseen at below-average levels. The government announced the removal of import duties on maize in September 2023 with the aim to help shore-up domestic supplies in view of a likely reduced harvest in 2024.

Food inflation in double digits throughout 2023

Following a short-lived decline in August 2023, maize meal prices increased again in September and were more than four times higher on a yearly basis. Reflecting the importance of the product in national diets and, therefore, its large weight in the consumer price index, the annual food inflation rate accelerated to 23 percent from 18 percent in August. This increase follows a moderate depreciation of the national currency, which has been a key factor underpinning rapid price growth in the last couple of years. The food inflation rate throughout 2023 has consistently been in double-digits figures.

Significantly high levels of food insecurity in 2023/24

Nearly 3.5 million people are projected to be acutely food insecure and in need of urgent assistance up until at least March 2024. The primary cause of the high prevalence of food insecurity are the exceptionally high food prices that, combined with a weak economic growth, have significantly eroded the purchasing power of households. Reduced agricultural outputs in southern and western provinces is a further factor stressing food insecurity.

In view of the likely negative effects of El Niño during the 2023/24 agricultural season, anticipatory actions should be scaled up to minimize its impact on farmers' livelihoods and limit repercussions in terms of food insecurity.

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This brief was prepared using the following data/tools:

FAO/GIEWS Country Cereal Balance Sheet (CCBS)

<https://www.fao.org/giews/data-tools/en/>

FAO/GIEWS Food Price Monitoring and Analysis (FPMA) Tool

<https://fpma.fao.org/>

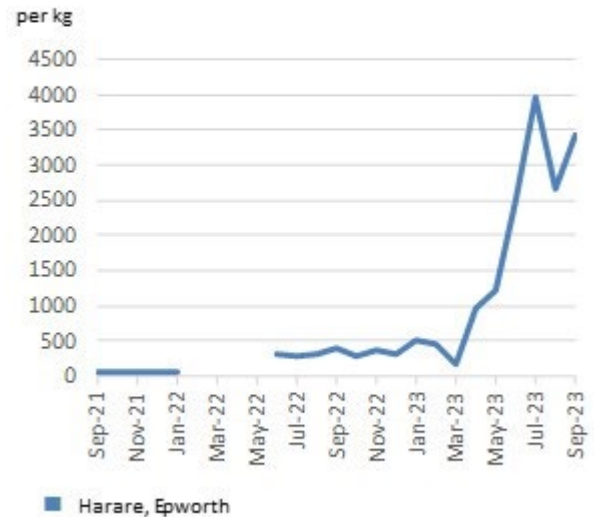
FAO/GIEWS Earth Observation for Crop Monitoring

<https://www.fao.org/giews/earthobservation/>

Integrated Food Security Phase Classification (IPC) <https://www.ipcinfo.org/>

Zimbabwe

Retail prices of maize meal in Zimbabwe





GIEWS Country Brief Zimbabwe

Reference Date: 03-October-2022

FOOD SECURITY SNAPSHOT

- Above-average rainfall amounts forecast for 2022/23 cropping season
- Adverse weather conditions resulted in below-average cereal outturn in 2022
- Food inflation still at exceptionally high levels
- Significantly high levels of food insecurity in 2022/23

Favourable rainfall forecasts for 2023 cereal crops

Planting of the 2023 cereal crops will begin in October 2022 and the harvest is expected to start in May next year. Current weather forecasts point to a higher-than-normal likelihood of above-average rainfall amounts between October 2022 and March 2023, boosting production prospects. However, the high prices of agricultural inputs, including fertilizers and fuel, are going to increase production costs and reduce application rates, with a likely adverse impact on farmers' planting intentions and yields.

Below-average cereal production in 2022

Total cereal production, including a forecast of the winter wheat crop that will be harvested from October, is pegged at 2 million tonnes in 2022, 4 percent below the five-year average. Production of maize, the main food staple, is estimated at about 1.6 million tonnes, slightly below the five-year average. The lower-than-average cereal outturn reflects unfavourable weather conditions, characterized by an uneven temporal distribution of rains, which resulted in low yields and offset the positive effects of an above-average area planted.

Imports expected to rise in 2022/23

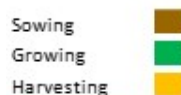
To compensate for the low cereal outturn in 2022, import requirements in the 2022/23 marketing year (April/March) are estimated to increase on a yearly basis, but remain lower than the recent five-year average. Maize imports are expected to rise between 100 000 and 200 000 tonnes in 2022/23, while a drawdown in stocks, which had been built up to above-average levels in the previous two years, will also help meet national consumption needs.

Imports of wheat in 2022/23 are foreseen at below-average levels due to a likely drawdown in domestic stocks. By contrast, imports

Zimbabwe

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Zimbabwe

Cereal Production

	2017-2021	2021	2022	change
	average			
	000 tonnes			percent
Maize	1 651	2 717	1 550	-6.1
Wheat	174	330	200	14.9
Sorghum	130	244	144	11.0
Others	113	150	90	-20.2
Total	2 068	3 441	1 984	-4.1

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

of rice, which is not produced in significant quantities in the country, are foreseen to rise to a level above the five-year average, as international prices are comparatively stable.

Food inflation rates at high levels

The annual food inflation rate was estimated at 353 percent in August 2022 and the country has experienced triple-digit inflation rates since April 2022. The exceptionally steep price increases have been underpinned by the sharp depreciation of the currency and elevated international prices of key food staples and energy.

In the second and third quarters of 2022, the government introduced a number of measures to curb inflationary pressure, raising to the benchmark interest rate and removing of import duties on several key food commodities, including cooking oil, maize meal and rice, for a period of six months from May. These policies contributed to slightly ease the monthly food inflation rate, which was estimated at 14 percent in August compared to 29 percent in July.

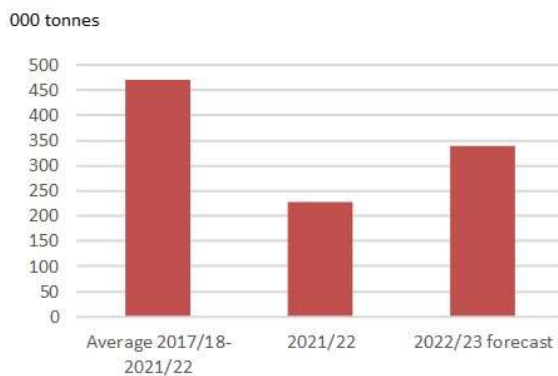
Significantly high levels of food insecurity in 2022/23

According to a recent national assessment, about 3.8 million people are projected to face acute food insecurity during the upcoming peak lean season (January–March 2023). This figure is 30 percent higher compared to the corresponding period in 2022. The worsening conditions reflect predominately the persisting macroeconomic challenges and high food prices.

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Cereals Imports



Notes: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.



GIEWS Country Brief Zimbabwe

Reference Date: 03-June-2022

FOOD SECURITY SNAPSHOT

- Low rainfall amounts caused cereal production to decline to slightly below-average level of 1.9 million tonnes in 2022
- Good opening cereal stock levels seen to partly compensate for reduced harvests, but imports still forecast to rise in 2022/23
- Food price increases accelerated in April, amid effects of exceptionally high international prices
- Food security conditions likely to deteriorate in 2022/23 compared to conditions in preceding year

Cereal production drops to slightly below-average level in 2022

Harvesting of the 2022 cereal crops is underway and it is expected to be completed in early July, later than normal due to a delayed start of the rains. The cropping season was largely characterized by an uneven temporal distribution of rainfall, with abundant precipitation in January, followed by dry spells in the subsequent months. Total seasonal rainfall amounts were also below average in all provinces.

Despite an above-average planted area of 1.9 million hectares, the 2022 production of maize (the main food staple) is officially estimated at about 1.6 million tonnes, slightly below the five-year average and 45 percent down from the bumper harvest in 2021. The lower output predominantly reflects the impact of unfavourable rains on yields, coupled with the effects of high temperatures.

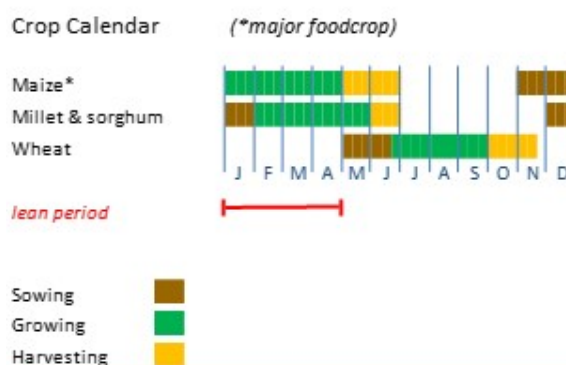
Yields of other cereal crops were similarly affected by the adverse weather conditions and the 2022 outputs of sorghum and millet are estimated to be around 40 percent below their respective averages. Production of groundnuts, sweet potatoes and beans are also estimated to have declined from the high levels of the previous year and this may limit the capacity of farming households to substitute cereals in their consumption patterns.

Overall, cereal production in 2022 is pegged at 1.9 million tonnes, 4 percent below the short-term average.

Imports expected to rise in 2022/23

To compensate for the lower cereal outturn in 2022, import requirements in the 2022/23 marketing year (April/March) are

Zimbabwe



Source: FAO/GIEWS, FEWSNET.

Zimbabwe

Cereal Production

	2017-2021	2021	2022	change
	average		forecast	2022/2021
	000 tonnes			percent
Maize	1 651	2 717	1 550	-43.0
Wheat	174	330	200	-39.4
Sorghum	130	244	144	-41.0
Others	113	150	90	-39.9
Total	2 068	3 441	1 984	-42.3

Note: Percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

estimated to increase on a yearly basis. Maize imports are expected to rise to a level between 100 000 and 200 000 tonnes in 2022/23, while a drawdown in stocks, which had been built up to above-average levels in the previous two years, will contribute to meet the national consumption needs.

Imports of wheat, with the domestic harvest normally accounting for about two-thirds of the national utilization, are foreseen to fall in 2022/23 to a below-average level. The expected decline reflects a likely drawdown in domestic stocks, as well as the effects of high international wheat prices and global supply chain disruptions due to the war in Ukraine, which are likely to constrain trade options. By contrast, imports of rice, which is not produced in significant quantities in the country, are foreseen to rise to a level above the five-year average, with international prices comparatively stable.

Food inflation accelerates

The official monthly food inflation rate was estimated at 18 percent in April, with a sharp uptick compared to March's rate of 6 percent. On a yearly basis, food prices had doubled. Although changes in the value of the national currency against the US dollar continued to be the key driver of price movements, the rising prices of foods and energy in the international market, fuelled by the war in Ukraine, contributed to the recent steep increase.

To alleviate the upward price pressure, the Government of Zimbabwe suspended the import duties on a number of food items, including rice and maize meal, for six months from mid-May. In February, the government had also lifted the import ban on maize grain, amidst poor harvest expectations.

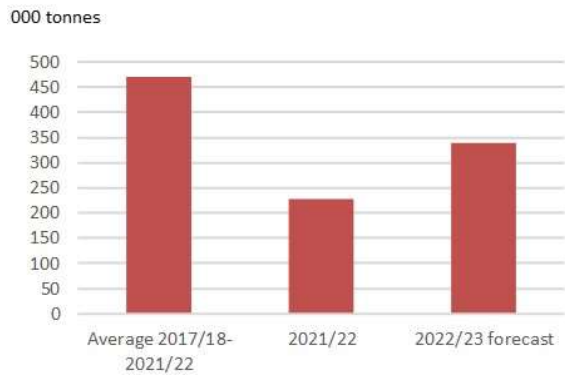
Likely deterioration in food insecurity in 2022/23

Projections on the number of food insecure people are not yet available for 2022/23. However, based on the current situation, the prevalence of food insecurity is foreseen to increase from the latest FEWS NET assessment that estimated 2.5 to 3 million people in need of humanitarian assistance during the peak of the lean season between February and May 2022. This most likely scenario predominantly reflects the impact of the downturn in domestic food production and rising costs of food. The forecasted slowdown in economic growth in 2022 and the lingering impacts of the COVID-19 pandemic present further downside risks to food security in 2022/23. The decline in economic growth is seen to continue to adversely affect employment and livelihood opportunities, with negative implications for households' income and their ability to purchase foods.

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Zimbabwe

Cereals Imports



Notes: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.



GIEWS Country Brief Zimbabwe

Reference Date: 18-January-2022

FOOD SECURITY SNAPSHOT

- Uncertain prospects for 2022 cereal crops following mixed start to cropping season
- Cereal production rebounded strongly in 2021 after two years of weather-reduced harvests
- Reflecting large domestic supplies, cereal imports forecast to fall steeply in 2021/22 marketing year
- Food price increases picked up at end of 2021, but remained lower than high rates in 2020
- Food security conditions improve, but access constraints remain a concern

Uncertain outlook for 2022 cereal crops

Sowing of the 2022 cereal crops is nearly complete. Conditions for planting and crop emergence have been mostly favourable, reflecting near-average rainfall amounts across the country in November and early December 2021. A reduction in rainfall in the second half of December in northern parts of the country, where the bulk of the national maize crop is produced, combined with abnormally high temperatures, is likely to have been detrimental to crop growth. Although remote sensing data depicted slightly poorer-than-average vegetation conditions in northwestern areas, reflecting the reduced rains, vegetation health was generally near average in early January 2022 in most provinces of the country.

Looking further ahead, weather forecasts for February and March 2022 point to a higher-than-normal probability of reduced rainfall amounts. These months are generally a critical period for the development of cereal grains and water stress can cause large yield reductions.

The 2022 maize production is forecast at an above-average level, but substantially below the exceptional output of 2021.

Substantial cereal harvest in 2021

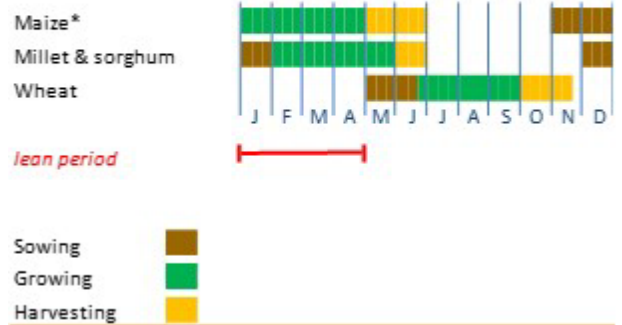
Total cereal production in 2021 is estimated at 3.4 million tonnes, nearly 2 million tonnes above the five-year average.

Production of maize, the principal food crop, is estimated at 2.7 million tonnes, more than double the five-year average. The large outturn reflects an expansion in the sown area, estimated at a well above-average level of 1.9 million hectares, and high yields. The upturn in crop productivity results from almost ideal weather conditions throughout the season and widespread distribution of subsidized agricultural inputs, mostly fertilizers,

Zimbabwe

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Zimbabwe

Cereal Production

	2016-2020	2020	2021	change
	average		estimate	2021/2020
000 tonnes				
Maize	1 210	908	2 717	199.4
Wheat	112	150	330	120.0
Sorghum	88	104	244	135.3
Others	97	90	150	67.0
Total	1 508	1 251	3 441	175.0

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

through government programmes, including the Presidential Input Scheme that targeted about 1.8 million smallholder farmers.

Outturns of other cereal crops, including sorghum and millet, are also estimated at high levels in 2021, exceeding the five-year averages. Production of wheat, which was harvested during the last quarter of 2021, is estimated at a well above-average level of over 300 000 tonnes.

Cereal import needs expected to fall in 2021/22

On account of the large domestic output, cereal import requirements in the 2021/22 marketing year (April/March) have been cut significantly. Total cereal imports, which would now almost entirely comprise of rice and wheat, with very limited quantities of maize in contrast to previous years, are forecast to be lower than 200 000 tonnes, well below the five-year average. In addition, national stocks are forecast to be built up to an above-average level, inferring a comfortable domestic supply situation.

Uptick in food price increases

The official monthly food inflation rate was estimated at 6.2 percent in December 2021, an upturn compared to rates in mid-2021 when it was as low as 1 percent in May. The increase towards the end of 2021 was largely underpinned by a period of currency weakness, particularly in the parallel market, which supported a steeper rise in prices of goods bought with Zimbabwe dollars, while prices in US dollar terms were reportedly more stable. The increase in the pump price for diesel and petrol last October was also a contributory factor. Despite the moderate rise in food price increases in the last two quarters of 2021, when compared with inflation rates in 2020, food prices were much more stable owing to the large domestic 2021 cereal harvest and an overall more stable exchange rate.

Overall improved food security situation in early 2022

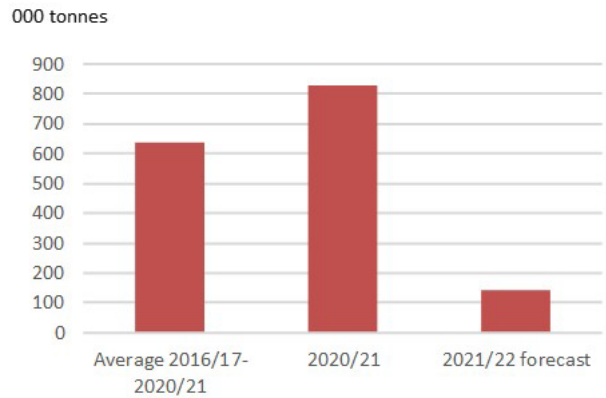
In the previous lean season between January and March 2021, the IPC acute food security analysis estimated that about 3.4 million people were in need of humanitarian assistance. Although for the current lean period in 2022 IPC estimates are not yet available, the number of people in need of support is expected to be lower, reflecting the substantial upturn in domestic production and, therefore, an increase in households' food supplies. This situation is mirrored in a reduction in government and humanitarian food assistance. For example, the government has reduced the size of food rations distributed to vulnerable households from 50 to 10 kg of cereal per person.

The most vulnerable households, however, still face high levels of food insecurity, particularly related to economic access to food. This is due to the continued increase in food prices and reductions in incomes stemming from the effects of the COVID-19 pandemic. Although overall economic growth is expected to pick up, households' incomes are not foreseen to recover significantly in 2022.

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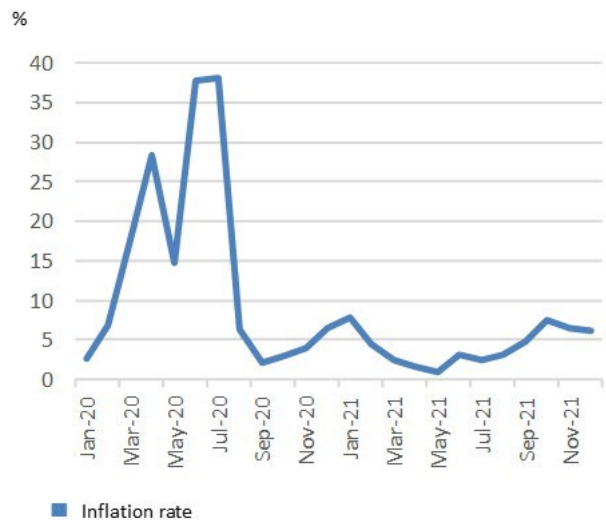
Cereals Imports



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).
Source: FAO/GIEWS Country Cereal Balance Sheets.

Zimbabwe

Inflation rate, monthly



Source: Reserve Bank of Zimbabwe.



GIEWS Country Brief Zimbabwe

Reference Date: 06-May-2021

FOOD SECURITY SNAPSHOT

- Cereal production expected to rebound strongly in 2021 after two years of weather-reduced harvests
- Cereal imports forecast to fall steeply in 2021/22 marketing year
- Food price increases eased in recent months, but price levels still remained exceptionally high
- Food security anticipated to improve in 2021 due to increased food availability, but access constraints will remain a concern

Bumper harvest expected in 2021

Harvesting of the 2021 cereal crops has begun and production is officially estimated at a significantly high level, following two years of weather-reduced outputs.

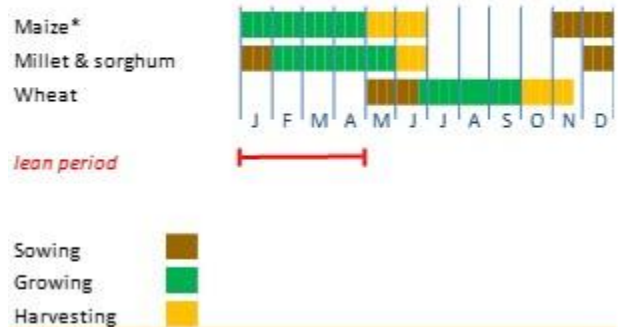
Production of maize, the principal food crop, is estimated at 2.7 million tonnes in 2021, more than double the five-year average. The expected abundant harvest reflects both an expansion in the sown area, estimated at a well above-average level of 1.9 million hectares, and excellent yield prospects. Since the start of the cropping season in October 2020, rainfall has been well distributed temporally and spatially, and cumulative levels (October-April) were average to above average. As a result, in April, values of remote sensing vegetation indices in cropped areas were near the ten-year highs, affirming expectations of high crop yields. The widespread distribution of subsidized agricultural inputs, mostly fertilizers, through government programmes, including the Presidential Input Scheme that targeted about 1.8 million smallholder farmers, have further reinforced the good yield prospects. However, a decline in rainfall amounts in late March and early April, coupled with localized outbreaks of locusts and other pests (including Fall Armyworms) in southern districts, could result in a small downward revision to the current production estimate.

Outturns of other cereal crops, including sorghum and millet, are also estimated to increase steeply in 2021 and surpass the five-year average levels. Overall, on account of both the large planted area and good yield prospects, total cereal production is foreseen to rebound significantly to a level of over 3.2 million tonnes in 2021, well above the short-term average.

Zimbabwe

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Zimbabwe

Cereal Production

	2016-2020	2020	2021	change
	average			2021/2020
000 tonnes				
Maize	1 210	908	2 717	199.4
Wheat	112	150	150	0.0
Sorghum	88	104	244	135.3
Others	97	90	150	66.7
Total	1 508	1 251	3 261	160.6

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Cereal import needs expected to fall in 2021/22

Based on the expected strong rebound in maize production, import requirements in the 2021/22 marketing year (April/March) are foreseen to fall steeply to almost negligible levels, well below the five-year average quantity of 400 000 tonnes. In addition, national stocks are also expected to increase substantially to an above-average level. Imports of wheat and rice, which are produced in smaller quantities compared to maize, are forecast at near-average levels.

Food price increases eased, but overall levels remained high

The official monthly food inflation rate was estimated at 1.7 percent in April, lower than March's level and the exceptionally high rates registered in mid-2020, when it peaked at 38 percent. The slowdown in price increases partly reflects the relative stability of the official exchange rate since the last quarter of 2020 that has helped to temper imported inflation as well as the large quantities of grain imports, which have shored up domestic supplies. However, on a yearly basis, food prices remained significantly high and the overall annual inflation rate was estimated at 217 percent in April 2021, mostly reflecting the effects of a generally weak currency, rapid growth in money supply and poor harvests in 2020 and 2019 that caused a tight supply situation.

Food security expected to improve in 2021

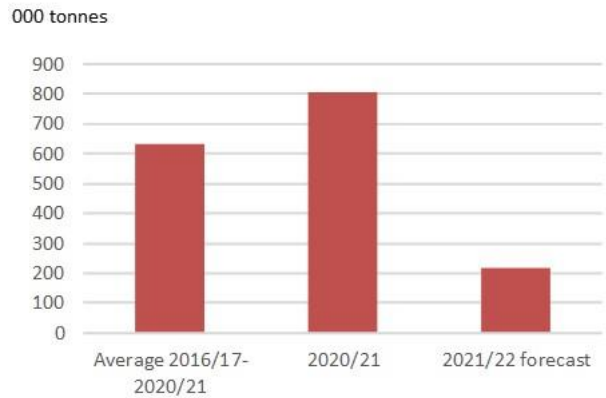
According to the latest IPC acute food security analysis, about 3.4 million people were assessed to be in need of humanitarian assistance in the January-March 2021 period, about 1 million people less than the estimate of the same period in the previous year. The country faced multiple shocks in recent years, including drought-reduced agricultural outputs and severe macro-economic difficulties. These factors reduced households' food availability and impinged on their access to food throughout 2019 and 2020. The negative effects of the COVID-19 pandemic aggravated conditions, particularly with regard to income levels due to market instability from COVID-19 lockdown measures.

The expected large harvest in 2021 is anticipated to significantly improve households' food supplies and to result in a decrease in the number of people needing assistance in the second and third quarters of the year. There are still significant concerns regarding access to food, as households' incomes are not foreseen to recover significantly, reflecting the overall poor economic growth prospects, while food prices are anticipated to remain at high levels despite likely seasonal declines in the coming months.

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Zimbabwe

Cereals Imports



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).
Source: FAO/GIEWS Country Cereal Balance Sheets.



GIEWS Country Brief Zimbabwe

Reference Date: 28-October-2020

FOOD SECURITY SNAPSHOT

- Weather outlook favourable, but economic constraints curtail production prospects
- Poor rains reduced cereal production in 2020
- Large quantity of cereal imports needed in 2020/21 marketing year
- Food prices increased sharply throughout 2020
- More than 5 million people food insecure in 2020

Weather outlook favourable, but economic constraints curtail production prospects

Land preparation and planting activities for the main 2020/21 cropping season (October-June) are underway. Early rainfall amounts in October were estimated to be mostly above average, boosting soil moisture levels and supporting crop germination. The rainfall outlook for the November 2020-January 2021 period points to a slightly higher probability of above-normal rainfall, inferring likely conducive conditions for the 2021 cereal crops, although the risk of excessive rainfall and flood damage also increases.

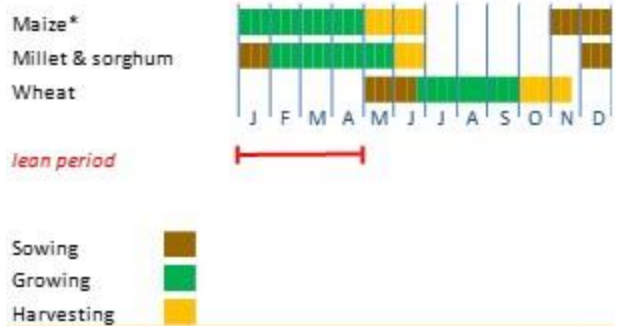
In spite of the overall favourable rainfall outlook, which could support an upturn in yields compared to the reduced levels of the previous two years, economic challenges, aggravated by the effects of the COVID-19 pandemic, are expected to limit the area planted and could adversely affect yields due to an expected reduction in input use reflecting a decline in incomes. Household-level assessments conducted in May/June showed that incomes had fallen. According to the Zimbabwe Vulnerability Assessment Committee's (ZIMVAC) evaluation, released in October, it was estimated that the average income of a rural household declined by about 25 percent in April 2020 compared to the corresponding month in 2019 (from USD 44 to USD 33). The reduced income level, in the context of exceptionally high annual inflation rates that exceeded 800 percent, is expected to hamper farmers' access to agricultural inputs, including seeds, fertilizers and labour, and could result in a reduction in the planted area compared to the average.

The Government is implementing programmes to support farmers' access to agricultural inputs, including the Presidential Input Scheme, which is targeting about 1.8 million smallholder farmers, and to promote the adoption of conservation agriculture techniques.

Zimbabwe

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Zimbabwe

Cereal Production

	2015-2019 average	2019	2020 estimate	change 2020/2019
	000 tonnes			percent
Maize	1 177	777	908	16.9
Wheat	92	80	150	87.5
Sorghum	75	41	104	150.6
Others	92	76	90	18.9
Total	1 436	974	1 251	28.5

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Increased rainfall amounts in the next months are also expected to improve the availability of pasture and water resources for livestock. Mortality rates of cattle were estimated to have increased in 2020 compared to the previous year, largely attributable to the negative impact of dry weather conditions on pasture resources and an increase in the incidences of livestock diseases.

Poor rains reduced cereal production in 2020

Production of cereals in 2020 is estimated at 1.25 million tonnes, about 13 percent below the five-year average. This output includes the winter wheat crop, which is currently being harvested and is expected at an above-average level, mostly on account of an increase in the planted area.

Production of cereals from the main summer season, with crops generally harvested by June, is estimated at a below-average level of 1.1 million tonnes, despite increasing moderately compared to the previous year's low level. The reduced harvest was primarily the result of low yields, driven by poorly distributed seasonal rains. Increased outputs of sorghum and millet prevented a larger decline in the national cereal output, reflecting area expansions, as farmers, supported by national institutions, opted to increase production of these drought-tolerant cereal crops.

Large quantities of cereal imports needed in 2020/21 marketing year

Due to a second consecutive below-average cereal harvest in 2020 and the low level of domestic stocks, cereal import requirements in the 2020/21 marketing year (April/March) are estimated at about 1.1 million tonnes, more than 50 percent above the five-year average. This quantity is mostly comprised of maize grain, estimated at over 750 000 tonnes, nearly double the average.

Although export availabilities in the region have increased in 2020 compared to the previous year, reflecting large outputs in South Africa and Zambia, the weak currency and the macro-economic challenges that the country faces pose difficulties in terms of the capacity to access sufficient imports. Despite stabilizing in recent months, the national currency depreciated substantially against the US dollar since the beginning of the year and has consequently inflated import costs. Moreover, the recently increasing prices in South Africa are likely to raise import prices further; however, prices in Zambia, the second main exporter in the subregion, have been more stable and this could limit overall import costs for the country.

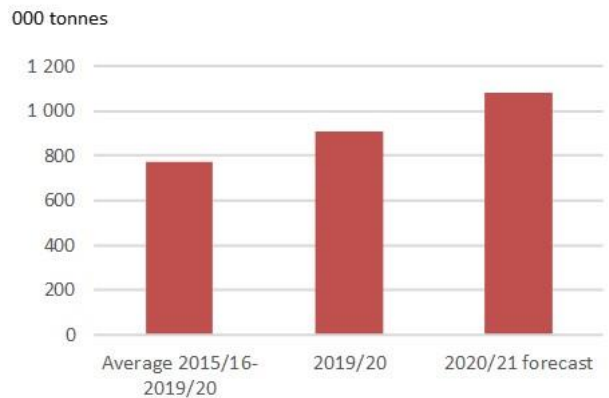
Food prices increased sharply throughout 2020

Food prices climbed steeply throughout 2020 and the annual food inflation rate in August was estimated at 865 percent. The key underlying factor behind the high prices has been the instability and the weakness of the national currency. The low domestic harvests exerted additional upward pressure on prices and resulted in substantial import needs that have accentuated the effects of imported inflation on domestic food prices.

To limit further price increases, the Government introduced an auction exchange rate system in June to stymie losses of the value of the currency and narrow the gap between the official and parallel market exchange rates. According to data from the

Zimbabwe

Cereals Imports



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Reserve Bank of Zimbabwe, the currency depreciation decelerated in July and August, and this is reflected in a slowdown in the monthly inflation rate in August.

Over 5 million people food insecure

The country has faced multiple shocks in recent years, including drought-reduced agricultural outputs and severe macro-economic difficulties. These factors have reduced households' food availability and impinged on their access to food, causing a sharp and sustained deterioration in food insecurity. The negative effects of the COVID-19 pandemic have further worsened the situation, particularly on account of a widespread loss of income and jobs, notably from the closure of informal markets due to the COVID-19 lockdown measures. According to results from the ZIMVAC, 5.5 million people in rural areas are projected to be food insecure in the first quarter of 2021, prior to the start of the main 2021 cereal harvest.

These numbers are expected to be updated with more recent assessments, including an ongoing IPC analysis and a new ZIMVAC evaluation focused on urban populations.

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GIEWS Country Brief Zimbabwe

Reference Date: 25-June-2020

FOOD SECURITY SNAPSHOT

- Production of maize estimated at below-average level in 2020 on account of poor weather conditions and limited access to inputs
- Large quantities of cereal imports required in 2020/21 marketing year (April/March) to bridge domestic deficit
- Prices of cereals well above year-earlier levels driven by weak currency and tight supplies
- Prior to COVID-19 pandemic, about 4.3 million people estimated to be food insecure in first half of 2020

Production of maize in 2020 estimated at below-average level

Harvesting of the 2020 main season cereal crops, mostly maize, is expected to conclude by the end of June.

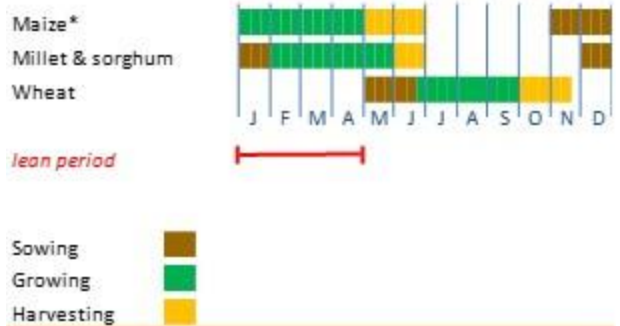
Production of maize is estimated at about 910 000 tonnes in 2020, about 25 percent below the five-year average although higher than the previous year's low level. The reduced output is primarily the result of low yields, with the national average estimated at 0.6 tonnes per hectare in 2020 compared to a five-year average of nearly 1 tonne per hectare. The low crop productivity reflects poor temporal rainfall distribution that particularly affected yields in the communal farming sector, where the use of agriculture inputs, notably fertilizers, is limited. In the northeastern Mashonaland provinces, which normally produce about 50 percent of the national maize output, precipitation was erratic across the season and seasonal rainfall was approximately 30 percent below the average. In the minor cereal-producing southern parts of the country, similar rainfall deficits resulted in permanent wilting of early-planted maize crops in localized areas. In addition to the reduced yields, a small contraction in the planted area, reflecting limited access to mostly imported agricultural inputs, amid sustained currency weakness and high inflation rates, further contributed to the low maize output in 2020.

By contrast, outputs of sorghum and millet increased significantly in 2020 and are estimated at 103 700 tonnes and 49 000 tonnes, respectively. The increases mainly reflect expansions in the areas sown as farmers, supported by national institutions, opted to increase production of drought-tolerant cereal crops.

Zimbabwe

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Zimbabwe

Cereal Production

	2015-2019 average	2019	2020 forecast	change 2020/2019
	000 tonnes			percent
Maize	1 177	777	908	16.9
Wheat	92	80	100	25.0
Sorghum	75	41	104	150.6
Others	92	76	90	18.7
Total	1 436	974	1 201	23.4

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

With an expected near-average output of the winter wheat crops to be harvested in October and November, the 2020 aggregate cereal production is forecast at 1.2 million tonnes in 2020, 15 percent below the five-year average but above the low level of 2019, when production was severely affected by extreme weather events, including drought and the passage of Cyclone Idai.

The below-average seasonal rains, which ended earlier than normal in 2020, affected rangeland conditions, particularly in the provinces of Matabeleland North, Matabeleland South, Midlands (especially in southern districts) and Masvingo. As a consequence, mortality rates of cattle increased in 2020 compared to the previous year, largely attributable to the impact of the dry weather conditions and an increase in the incidences of livestock diseases.

Large quantities of cereal imports needed in 2020/21 marketing year

Due to a second consecutive year with a below-average cereal outturn and the low level of domestic stocks, cereal import requirements in the 2020/21 marketing year (April/March) are estimated at about 1.1 million tonnes, more than 50 percent above the five-year average. This quantity is mostly comprised of maize grain, estimated at over 750 000 tonnes, nearly double the average.

In addition to the increased import needs, there are concerns regarding the country's ability to access international supplies given the shortages of foreign exchange reserves and the loss of value of the national currency that has inflated import costs. With the aim to contain the deterioration of the country's import capacity, in March 2020, the Government decided to switch from a managed floating exchange rate to a fixed rate, pegging the Zimbabwean dollar (ZML) at a rate of ZML 25 per US dollar. Furthermore, in December 2019, the Government decided to lift the ban on imports of Genetically Modified (GM) grains in order to allow traders to access increased quantities of cereals from South Africa, the main exporter in the region, which predominantly produces GM grains.

Prices of food continued to increase sharply in 2020

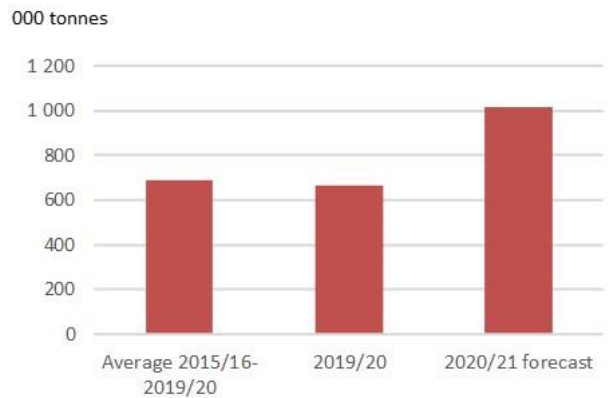
A combination of sustained currency weakness and low domestic supplies have exerted strong upward pressure on food prices since the second half of 2019, causing abrupt increases and sustaining high levels. Despite modest declines in December 2019 and January 2020, reflecting the implementation of price subsidies and improved market supplies due to the removal of the import ban on GM grains, prices continued to rise sharply since February. The annual inflation rate in May was estimated at nearly 800 percent. The increases in recent months have also been underpinned by the effects of the COVID-19 pandemic. To ease pressure on import prices, given the expected large import requirements in the 2020/21 marketing year, the Government temporarily suspended the import tariffs on wheat and maize products from May 2020.

About 4.3 million people estimated food insecure in first half of 2020

Prior to the outbreak of the COVID-19 pandemic in the country, the number of people assessed to be food insecure in the February-June 2020 period was estimated at about 4.34 million,

Zimbabwe

Cereals Imports



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

accounting for 45 percent of the rural population, according to the latest IPC analysis released in March 2020. The high levels of food insecurity were mostly the result of reduced availability of grains and the high food prices that severely constrained access to food.

Considering the negative effects of the COVID-19 pandemic and the associated containment measures, the prevalence of food insecurity is expected to increase from the third quarter of 2020 to early 2021. Shocks on both the demand side (reduced household incomes due to an expected economic contraction) and on the supply side (logistical bottlenecks hindering the normal flow of food commodities) are expected to curtail the households' access to food. In addition, although there was a small upturn in the cereal harvest, production in 2020 remains below average and consequently farm-derived incomes are also likely to remain below average. In addition, there was also a decline in tobacco production, a key cash crop for farming households and an important export commodity. This output decline is foreseen to further reduce income-generating opportunities from crop sales and lower export earnings for the country as a whole.

COVID-19 and measures adopted by the Government

The confinement and movement measures enforced in late March 2020 were progressively eased and finally lifted in mid-June. Some essential services were allowed to operate during the lockdown period, including productive and commercial activities along the food value chain, with the exception of informal street vendors. The relaxation of measures allowed the resumption of informal markets, which are currently operational.

In April 2020, the Government launched a USD 2.2 billion domestic and international humanitarian appeal, of which USD 956 million is intended for food security programmes and USD 20.8 million for social protection measures, mostly cash-based transfer programmes. In early May 2020, the Government announced a broad economic recovery package, which will allocate ZWL 6 billion to provide liquidity support to the agriculture sector and ZWL 3.9 billion to expand social protection and food grants coverage.

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GIEWS Country Brief Zimbabwe

Reference Date: 25-June-2020

FOOD SECURITY SNAPSHOT

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Production of maize in 2020 estimated at below-average level

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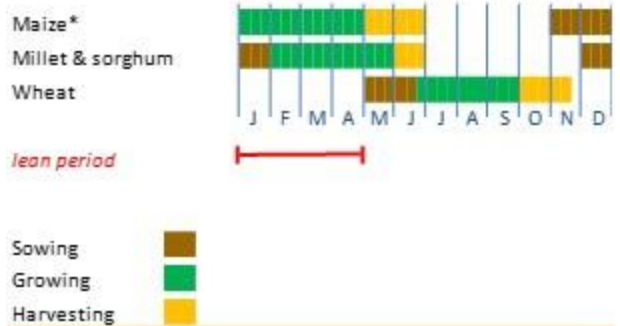
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Zimbabwe

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Zimbabwe

Cereal Production

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In addition to the increased import needs, there are concerns regarding the country's ability to access international supplies given the shortages of foreign exchange reserves and the loss of value of the national currency that has inflated import costs. With the aim to contain the deterioration of the country's import capacity, in March 2020, the Government decided to switch from a managed floating exchange rate to a fixed rate, pegging the Zimbabwean dollar (ZML) at a rate of ZML 25 per US dollar. Furthermore, in December 2019, the Government decided to lift the ban on imports of Genetically Modified (GM) grains in order to allow traders to access increased quantities of cereals from South Africa, the main exporter in the region, which predominantly produces GM grains.

Prices of food continued to increase sharply in 2020

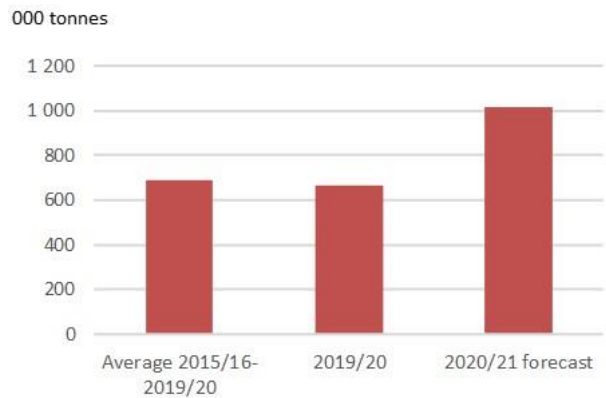
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Prior to the outbreak of the COVID-19 pandemic in the country, the number of people assessed to be food insecure in the February-June 2020 period was estimated at about 4.34 million,

Zimbabwe

Cereals Imports



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

accounting for 45 percent of the rural population, according to the latest IPC analysis released in March 2020. The high levels of food insecurity were mostly the result of reduced availability of grains and the high food prices that severely constrained access to food.

Considering the negative effects of the COVID-19 pandemic and the associated containment measures, the prevalence of food insecurity is expected to increase from the third quarter of 2020 to early 2021. Shocks on both the demand side (reduced household incomes due to an expected economic contraction) and on the supply side (logistical bottlenecks hindering the normal flow of food commodities) are expected to curtail the households' access to food. In addition, although there was a small upturn in the cereal harvest, production in 2020 remains below average and consequently farm-derived incomes are also likely to remain below average. In addition, there was also a decline in tobacco production, a key cash crop for farming households and an important export commodity. This output decline is foreseen to further reduce income-generating opportunities from crop sales and lower export earnings for the country as a whole.

COVID-19 and measures adopted by the Government

The confinement and movement measures enforced in late March 2020 were progressively eased and finally lifted in mid-June. Some essential services were allowed to operate during the lockdown period, including productive and commercial activities along the food value chain, with the exception of informal street vendors. The relaxation of measures allowed the resumption of informal markets, which are currently operational.

In April 2020, the Government launched a USD 2.2 billion domestic and international humanitarian appeal, of which USD 956 million is intended for food security programmes and USD 20.8 million for social protection measures, mostly cash-based transfer programmes. In early May 2020, the Government announced a broad economic recovery package, which will allocate ZWL 6 billion to provide liquidity support to the agriculture sector and ZWL 3.9 billion to expand social protection and food grants coverage.

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GIEWS Country Brief Zimbabwe

Reference Date: 23-March-2020

FOOD SECURITY SNAPSHOT

- Unfavourable production prospects for 2020 cereal crops
- Large volumes of cereal imports needed in 2019/20 marketing year (April/March)
- Cereal prices as of January 2020 up to ten times higher than year-earlier levels
- Number of food insecure people estimated 5.5 million in October-December 2020 period

Unfavourable production prospects for 2020 cereal crops

Harvesting of the 2020 cereal crops, mainly maize, is expected to commence in May and production prospects are generally unfavourable.

A poor economic environment, including high inflation rates and sustained currency weakness, hindered access to agricultural inputs and increased production costs. In addition, seasonal rainfall was below average during the planting period in November and December 2019 in the main producing provinces, hampering planting operations. The combination of these factors resulted in a contraction in the sown area of the 2020 maize crop, the main cereal grown in the country. Conversely, for sorghum and millet, indications point to an increase in sowings, as farmers, with support from national institutions, opted to increase production of the more drought-tolerant cereal crops.

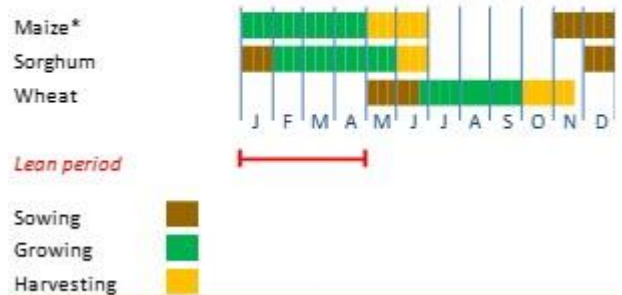
Precipitation improved in January and February 2020, reducing seasonal rainfall deficits in some areas, but soil moisture levels still remained inadequate in most provinces. In the northeastern Mashonaland provinces, which produce about 50 percent of the national maize output, seasonal rainfall amounts until February 2020 were approximately 25 percent below the average, causing stressed crop conditions in parts. In minor producing southern parts of the country, rainfall deficits were even larger, resulting in permanent wilting of cereal crops in localized areas.

For the March-May 2020 period, weather forecasts indicate a higher probability of below-average rainfall in the main cereal producing provinces in the centre and north, and average rainfall across the minor-producing south. Based on current conditions and the unfavourable weather outlook, production of cereals in

Zimbabwe

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Zimbabwe

Cereal Production

	2014-2018 average	2018	2019 estimate	change 2019/2018
	000 tonnes			percent
Maize	1 313	1 701	777	-54.3
Sorghum	94	78	41	-46.6
Millet	62	58	35	-39.6
Others	83	161	91	-43.6
Total	1 552	1 997	944	-52.7

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

2020 is forecast at a below-average level, reflecting low plantings and expected below-average yields.

Large volumes of cereal imports required in 2019/20 marketing year to cover 2019 reduced cereal production

Production of cereals in 2019 was estimated at a well below-average level of 944 000 tonnes due to unfavourable weather conditions. To guarantee adequate consumption levels, cereal import requirements in the 2019/20 marketing year (April/March) were estimated at over 900 000 tonnes, about 35 percent above the five-year average. The high volume mainly reflects the larger import needs for maize grain as the 2019 maize harvest was estimated to satisfy only the 40 percent of the national consumption requirement, nearly half if compared to the previous five years.

The estimated quantity of imports remains below the import requirement, indicating that national supplies are likely to remain very limited until the main harvest period. This is mainly due to a shortage of foreign exchange supplies for importers, in addition to the weaker domestic currency. So far, over 160 000 tonnes were imported from South Africa, an estimated 100 000 tonnes was reported to have been delivered from the United Republic of Tanzania and about 5 500 tonnes were sourced from Zambia. In addition, there are likely to have been informal imports but not at significant levels.

In order to increase imports, the Government lifted the ban on imports of Genetically Modified (GM) grains in December 2019, introducing the rule that grains must first be put into quarantine before being milled into flour.

Cereal prices increased sharply throughout 2019

The combination of a sustained currency weakness and low domestic supplies exerted strong upward pressure on food prices in 2019, causing abrupt increases and sustaining the high levels. In December 2019 and January 2020, however, some markets registered moderate monthly price declines, marking the first decrease since March 2019, reflecting the implementation of price subsidies and improved market supplies due to the removal of a ban of imports of GM grains. Despite this slight decline, nominal prices of maize meal and wheat flour, which is almost entirely imported, were up to ten times higher on a yearly basis in January 2020. Similarly, rice and bread prices are also at elevated levels.

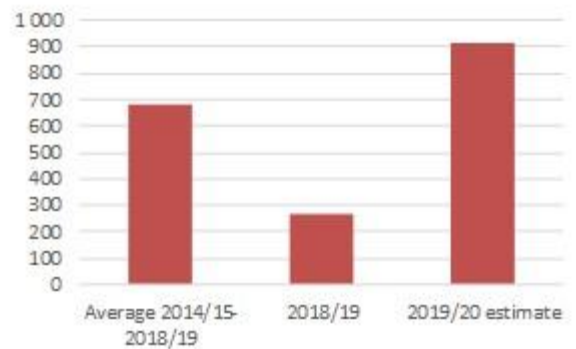
Significant number of people require food assistance

The number of food insecure people for the January-March 2020 period was estimated at about 5.5 million, the highest number on record, according to results from the Zimbabwe Vulnerability Assessment Committee released in July 2019. The high levels of food insecurity mostly resulted from the reduced availability of grains and the high food prices that severely constrained access to food. The low output not only reduced food availability for rural households, but also it cut incomes from agricultural-related activities, due to lower crop sales from households' own production.

Zimbabwe

Cereals Imports

000 tonnes



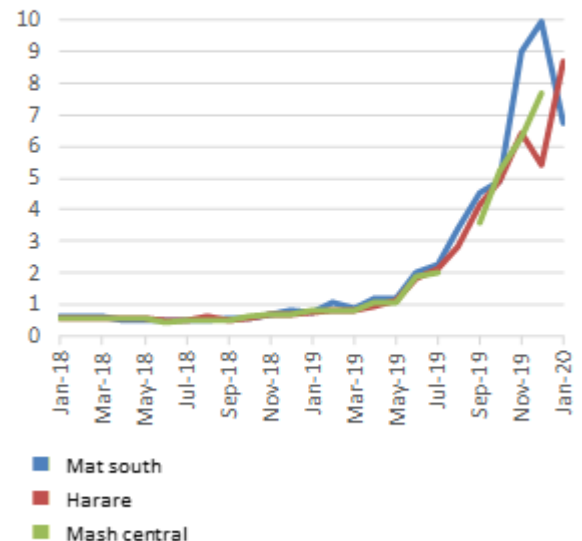
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Zimbabwe

Retail prices of maize meal

Zimbabwe Dollar per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

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GIEWS Country Brief Zimbabwe

Reference Date: 16-October-2019

FOOD SECURITY SNAPSHOT

- Favourable weather forecasts for main cereal producing areas, but economic difficulties could curb 2020 cereal plantings and hinder early crop growth
- Reflecting weather-reduced 2019 harvest, imports of cereals forecast to rise to well above-average level in 2019/20 marketing year
- Prices of cereal staples increased sharply and, as of August 2019, were more than four times higher on yearly basis
- Number of food insecure people projected to rise to 5.5 million in January-March 2020 period

Weather forecasts indicate favourable rains in northern areas but likely reduced rains in south

Planting of the 2020 cereal crops, mainly maize, is expected to start in November and the harvest period is foreseen to begin in April next year. Weather forecasts for the October-December 2019 period indicate a higher probability of average to above-average rainfall in the main cereal producing provinces of the north, auguring well for planting prospects and early crop growth. By contrast, the weather outlook for the same period in the southern provinces point to a higher likelihood of average to below-average precipitation, conditions that could delay plantings. However, a factor that is adversely weighing on the overall crop prospects is the economic difficulties that are pervading the country, including severe shortages of foreign currency reserves to pay for imported agricultural inputs, especially fertilizers, and the significantly high inflation rates. These conditions are constraining farmers' access to agricultural inputs in 2019 and have increased the general cost of production, factors that are likely to curtail plantings.

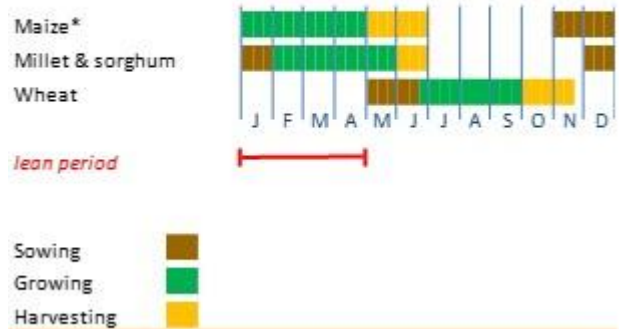
Below-average rains resulted in sharply reduced 2019 harvest

The 2019 cereal crops, mostly maize, were harvested by June and the aggregate cereal output is estimated at about 944 000 tonnes, approximately 40 percent below the five-year average. The production decline reflects unfavourable rainfall, with erratic distribution and below-average seasonal amounts, which caused both a decrease in the area harvested and average yields. In addition, the landfall of Cyclone Idai in March triggered heavy rainfall and flash floods in localized areas in eastern provinces,

Zimbabwe

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Zimbabwe

Cereal Production

	2014-2018 average	2018	2019 estimate	change 2019/2018
	000 tonnes			percent
Maize	1 313	1 701	777	-54.3
Sorghum	94	78	41	-46.6
Millet	62	58	35	-39.6
Others	83	161	91	-43.6
Total	1 552	1 997	944	-52.7

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

causing losses of standing crops.

Cereal import requirements forecast at above-average level

Total cereal import requirements are forecast at 958 000 tonnes in the 2019/20 marketing year (April/March), 40 percent above the five-year average. This high volume mainly results from larger needs of maize as the 2019 domestic harvest is estimated to satisfy only 40 percent of the national consumption requirements compared to an average of 80 percent over the previous five years. Imports of rice and wheat, which are produced in small quantities in the country, are forecast at 205 000 tonnes and 150 000 tonnes, respectively, about 10 percent above the five-year average.

Prices of cereal products rose steeply in 2019

Prices of maize meal and wheat flour have followed sustained upward trends since October 2018, with sharper monthly increases taking place between April and August 2019. As of August, prices of maize meal and wheat flour, which is almost entirely imported, were more than four times higher on a yearly basis. Prices of rice have also risen sharply since June 2019. The extreme price increases have been mostly driven by the depreciation of the national currency as well as the reduced domestic supplies of grain, due to the below-average harvest and shortages of foreign currency reserves that have curbed the country's capacity to import (please see the [GIEWS Update](#) for further information).

Significantly high levels of food insecurity

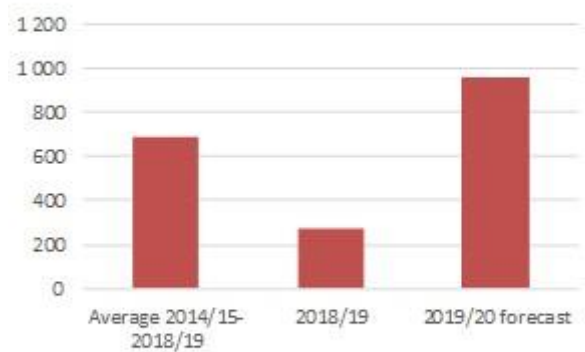
During the January-March 2020 period, the number of food insecure people is projected to increase to about 5.5 million, the highest number on record. The unprecedented levels of food insecurity mostly results from the reduced availability of grains and the very high food prices that are severely constraining access to food. The lower harvests have not only reduced food availability for rural households, but also cut incomes from agricultural-related activities, further compounding negative effects of the inflated food prices.

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Zimbabwe

Cereals Imports

000 tonnes



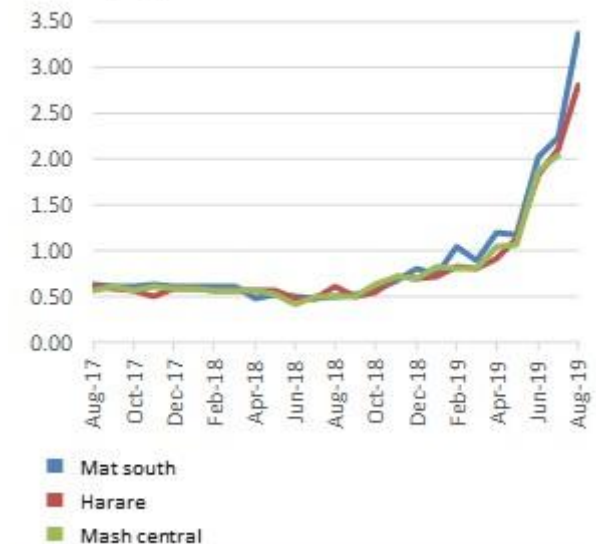
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Zimbabwe

Retail prices of maize meal

US Dollar per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Zimbabwe

Reference Date: 07-January-2019

FOOD SECURITY SNAPSHOT

- Production outlook for 2019 cereal crops diminished by unfavourable weather conditions at start of cropping season
- Supplies of cereals mostly satisfactory due to above-average 2018 harvest and large carryover stocks
- Steep price increases for wheat flour and rice in October
- Number of food insecure projected to reach 2.4 million between January and March 2019

Below-average rains adversely impact 2019 crop conditions

Planting of the 2019 cereal crops is underway and it is expected to conclude in early January. Precipitation since the start of the main cropping season (October-June) has been generally below average across most of the country, with more significant rainfall deficits in western areas. As a result, large portions of the country recorded reduced soil moisture levels and below-average vegetation conditions as of December 2018, inferring delayed plantings and retarded crop development. In the key cereal-producing northeastern provinces, between mid-November and mid-December 2018 seasonal rains were above normal in some parts, helping to alleviate moisture stress and boost crop conditions. However, follow-up rains are still required to ensure crop germination and establishment.

In addition to the generally unfavourable weather conditions, economic challenges, including liquidity constraints and foreign currency shortages, have adversely affected availability and access to inputs. These conditions are expected to have also hindered planting activities. The Government continues to implement programmes to reinforce access to agricultural inputs, including the Presidential Crop Input Scheme, which targets about 1.63 million smallholder farmers.

Although it is still early in the season, the current conditions have diminished the production outlook for the 2019 cereal crops. Moreover, weather forecasts for the January-March 2019 period, a key development period for cereal crops, point to a slightly higher probability of below-average precipitation.

Zimbabwe

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Zimbabwe

Cereal Production

	2013-2017 average	2017	2018 estimate	change 2018/2017
	000 tonnes			percent
Maize	1 133	2 156	1 701	-21.1
Sorghum	93	182	78	-57.4
Millet	58	107	58	-45.7
Others	72	91	101	11.0
Total	1 356	2 535	1 937	-23.6

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Above-average cereal production in 2018

Cereal production in 2018 is estimated at 1.94 million tonnes, 24 percent below last year's output, albeit still well above the previous five-year average. Maize production, which accounts for nearly 90 percent of the total cereal output, was estimated at an above-average level of 1.7 million tonnes, but 21 percent lower than 2017's harvest.

The reduced output in 2018 was mainly a result of a mid-season dry spell in January 2018, which caused a decline in yields, while unfavourable weather conditions at the start of the season contributed to a small contraction in the area planted.

For wheat, which is grown during the winter months, production is estimated to have increased in 2018 to an above-average level in excess of 100 000 tonnes, supported by Government programmes to increase access to inputs.

Imports of cereals forecast to remain low in 2018/19

Total cereal imports are forecast to remain at a below-average level in the 2018/19 marketing year (April/March), as the above-average 2018 harvest and large carryover stocks from 2017's bumper output are expected to satisfy the bulk of this year's consumption requirements. However, compared to the previous year imports are expected to increase.

Prices of wheat flour and rice climbed rapidly in late 2018

Following generally stable trends throughout most of 2018, prices of wheat flour climbed sharply in October 2018. The rapid rise was underpinned by foreign exchange shortages that acutely constrained the capacity to import adequate quantities of grains and by a steep drop in the value of the local currency (bond notes were introduced two years ago to alleviate liquidity constraints) against the US dollar. The reduced import volumes had reportedly limited milling operations, further pressuring prices. Following the sharp increases in October, prices of wheat flour were double their year earlier values. Prices of rice also increased sharply, but by lesser margins. Although inflationary pressures amplified the seasonal price increases, the price of maize meal, the country's main food staple, were broadly unchanged on a yearly basis due to overall adequate domestic supplies.

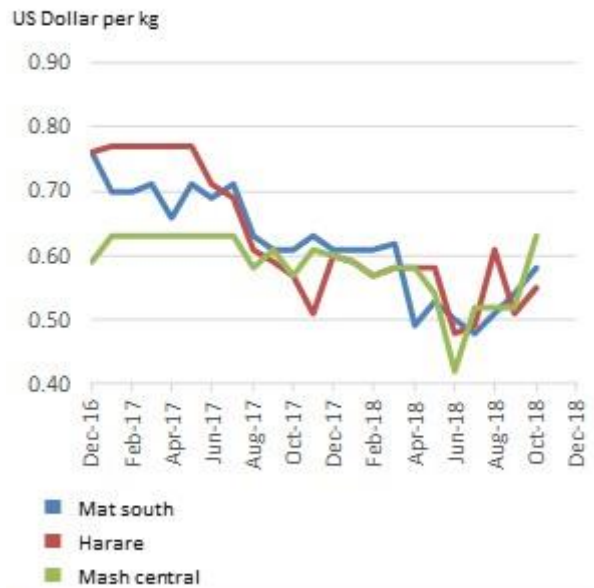
Reduced agricultural output and low purchasing power aggravates food insecurity

During the peak of the lean season (January-March 2019), about 2.4 million people are projected to be in IPC Phase 3, approximately 28 percent of the rural population, and would require humanitarian food assistance. This marks a deterioration compared to the 1.05 million people in the previous year, but is below the levels of 2015 and 2016, when between 3 and 4 million people were in need of assistance, mostly reflecting sharply reduced agricultural outputs.

Most food insecure people are in the northwest, where unfavourable climatic conditions resulted in reduced harvests. The poor food security conditions are also underpinned by

Zimbabwe

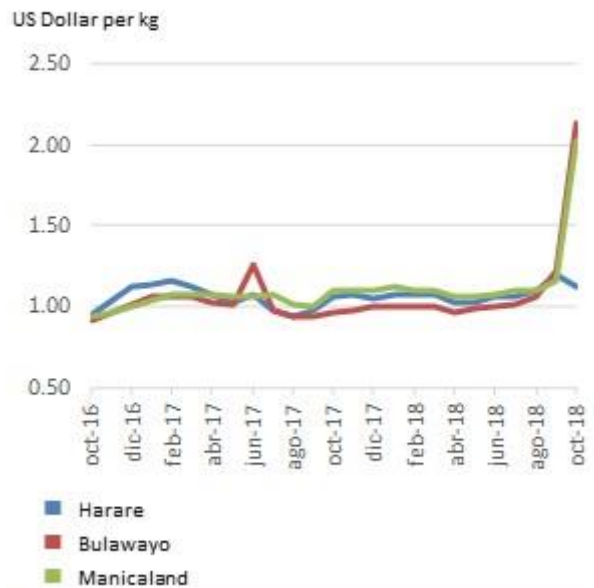
Retail prices of maize meal



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

Zimbabwe

Retail prices of wheat flour



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

reduced purchasing power that is acutely constraining households' access to food.

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GIEWS Country Brief Zimbabwe

Reference Date: 11-July-2018

FOOD SECURITY SNAPSHOT

- Production of maize estimated above average, but well below the 2017 bumper harvest
- Prices of maize generally stable, with slight decrease in April 2018
- Number of food insecure expected to increase in 2018/19, with highest prevalence of food insecurity in southern and western provinces

Cereal production in 2018 estimated to remain above average

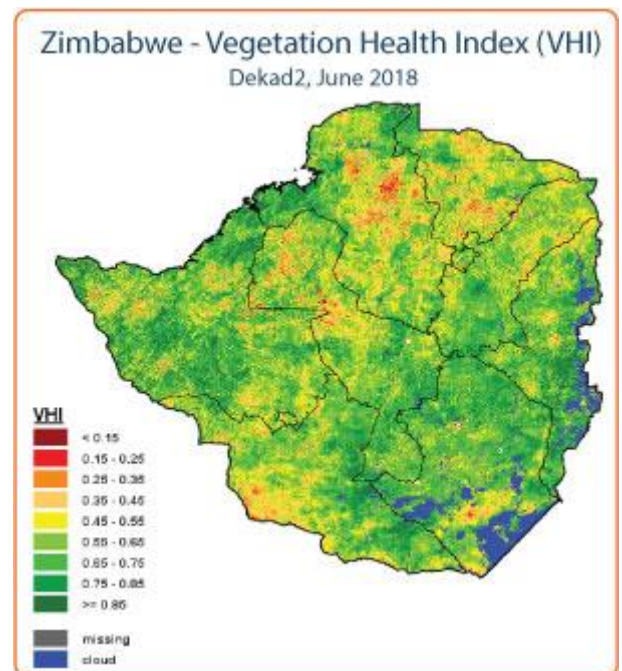
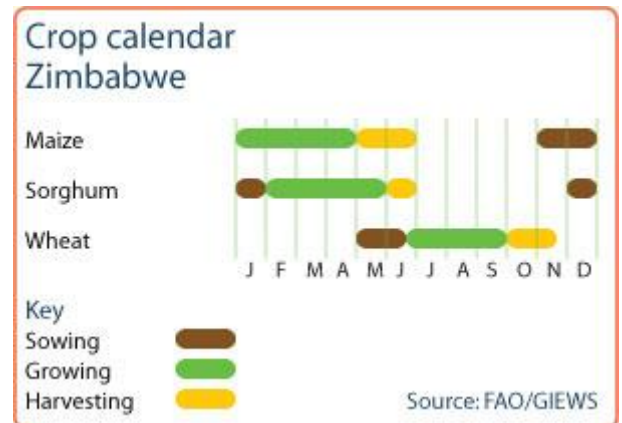
The 2018 maize, millet and sorghum harvest was recently completed, while planting of the winter wheat crops just began.

The 2018 cereal production is forecast at just under 2 million tonnes, 24 percent lower on an annual basis, but still above the previous five-year average. Maize production is expected to decrease by 21 percent in 2018 on a yearly basis, while production of sorghum and millet is foreseen to be around half of the high levels registered in 2017. At the subnational level, the largest maize production decreases are foreseen in the southern and western provinces, which experienced comparatively poorer weather conditions.

Crops were affected by a mid-season dry spell in January, which caused a reduction in yields, while unfavourable weather conditions at the start of the season also contributed to a small contraction in the area planted. Rains improved from mid-February and were at above-average levels in northern provinces, partly reversing the damage caused by earlier water deficits and averting a larger decrease in yields. As of June, only localized areas of Matabeleland South and Mashonaland West provinces continued to show water stress (see Vegetation Health Index).

Production estimates for cash crops also point to favourable outcomes. Tobacco and cotton harvests are forecast to increase by 3 percent compared to the last year's high levels, and the soybean output is foreseen at about 60 000 tonnes, 67 percent up on a yearly basis and a well-above average level, reflecting a larger harvested area that more than offset a reduction in yields.

Infestations of Fall Armyworm (FAW) persisted in the country. According to the 2018 Zimbabwe Vulnerability Assessment



Committee's (ZimVAC) annual evaluation, the pest mainly affected the late-planted maize crops, while the majority of farmers reported to not have had sufficient funds to adequately take control actions. The ZimVAC results also indicate that a larger number of households reported FAW presence in 2018 compared to the previous year, although the data does not quantify the impact on production, it is expected to be minimal at the national level.

The Government continued to support agricultural production through several programmes in 2017/18. The Command Programme supports maize and, from April 2018, wheat production of large-scale farmers (with more than 200 hectares of arable land) through the delivery of fertilizers and assistance with irrigation facilities. In 2018, about 67 000 hectares are expected to be planted to wheat, which, if favourable weather prevails, could boost production compared to the previous year. The Command Programme also expanded its support to include cotton, soybean, livestock and fishery production.

Imports are forecast to remain low in 2018/19

Total cereal imports are forecast to remain at below-average levels in the 2018/19 marketing year (April/March), on account of sufficient domestic availabilities, reflecting both the above-average 2018 harvest and large carryover stocks from the 2017's bumper output. However, an import ban on maize, the Government stopped issuing import permits in early 2017, is still in place. Wheat import needs are foreseen to remain more or less unchanged on a yearly basis.

Maize meal prices generally stable

Overall, prices of maize meal have remained stable since the beginning of 2018, continuing the previous year's trend. In April, prices generally declined across the country and were at values below their year-earlier levels. The major change was registered in Matabeleland South province, with a 21 percent month-on-month decrease and a 25 percent year-on-year decline. The lower and generally stable prices largely reflected the ample national supplies.

The Grain Marketing Board (GMB), the Government parastatal managing the strategic grain reserves, is procuring maize at a fixed price of USD 390 per tonne in 2018/19, unchanged from the previous year, while the private traders are offering a lower price reported to be around USD 300. The GMB is selling grain to millers at a subsidized price of between USD 240 and 270 per tonne.

Lower agricultural output expected to intensify food insecurity in 2018/19

The results of ZimVAC's evaluation indicate a year-on-year increase in the proportion of food insecure during the peak hunger period (January-March 2019), when an estimated 2.4 million people, about 28 percent of the rural population, are expected to be in need of food assistance. This marks a deterioration compared to 1.05 million people in the previous year, but is well below the levels of 2015 and 2016, when between, approximately, 3 million and 4 million people were in need of assistance, mostly reflecting the sharply reduced agricultural outputs.

At the subnational level, the provinces with the highest

Zimbabwe

Cereal production

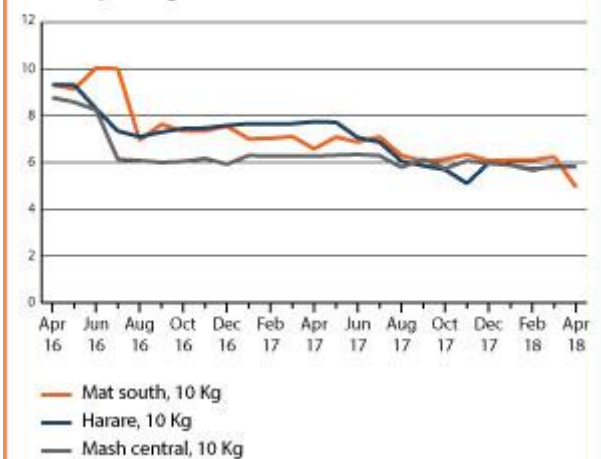
	2013-2017	2017	2018 forecast	change
	average			2018/2017
	000 tonnes			percent
Maize	1 133	2 156	1 701	-21
Sorghum	93	182	78	-57
Millet	58	107	58	-46
Others	72	91	101	11
Total	1 356	2 535	1 937	-24

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Zimbabwe

Retail prices of maize meal

US Dollar per 10 Kg



Source: ZIMSTAT

prevalence of food insecurity are Masvingo, Matabeleland South and North provinces, traditionally low cereal producing areas.

The deterioration is mainly reflective of the lower 2018 agricultural output and therefore reduced cereal availability for households. In addition, continuing cash shortages and generally constrained economic growth, weighs negatively on households' purchasing power, partly offsetting the effect of stable and generally lower year-on-year grain prices.

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GIEWS Country Brief Zimbabwe

Reference Date: 12-February-2018

FOOD SECURITY SNAPSHOT

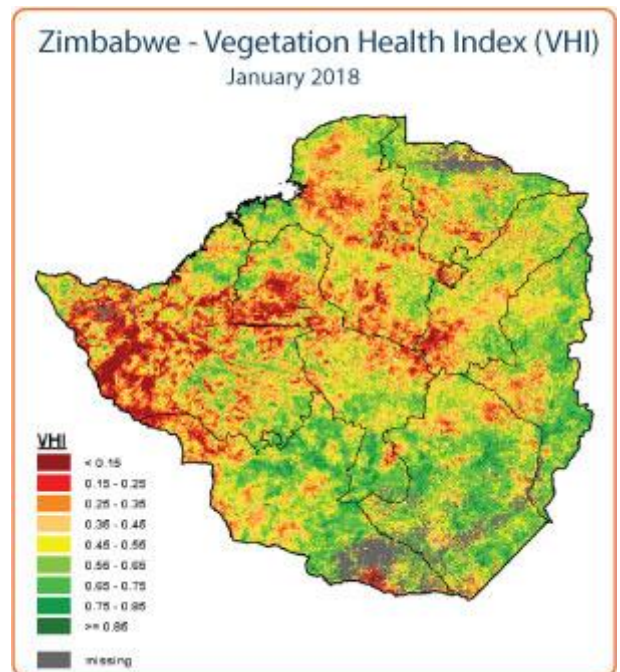
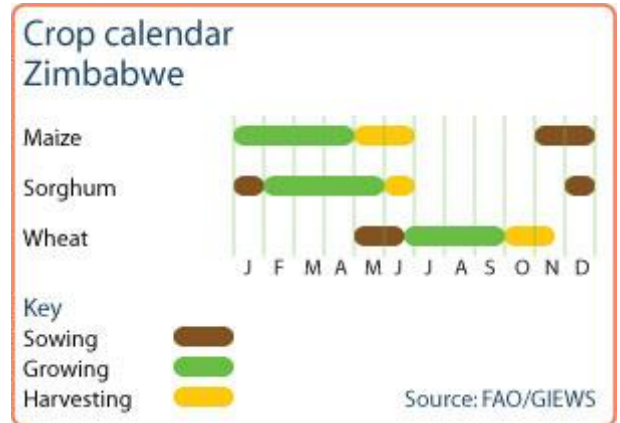
- Dry conditions lower production prospects for 2018 cereal crop
- Prices of maize remained stable in 2017, mostly on account of favourable supplies following bumper harvest
- Food security situation improved in 2017/18 compared to previous year, but decrease in agricultural production in 2018 likely to stress conditions

Below-average rains cause water stress and lower production prospects for 2018 cereal crops

Harvesting of the 2018 cereal crops is expected to begin in April. Most of the country received below average rainfall between October 2017 and January 2018. Several provinces recorded aggregate seasonal rainfall volumes of less than 30 percent compared to the average. The only exception is the large maize-producing province of Mashonaland East, where rains have been above average. Water stress has notably affected the early-planted maize crop in Matabeleland North and Mashonaland West provinces (see VHI map for January). However, in late January and early February, heavy rains were observed throughout most of the country partially alleviating the impact of the moisture stress. Moreover, above average rains are forecast for the remainder of February and this could help to partly reverse the damage caused by the water deficits, mainly for the later-planted maize crops.

The infestation of Fall Armyworm, which has spread to all provinces, also poses a further risk to this year's maize output. Reports indicate that the pest has already affected an estimated 20 percent of the maize crop in the Midlands Province.

The Government has continued to support agricultural production through several initiatives, including the Command Programme, where the Government contracted larger scale farmers to produce maize. As of 17 January, a total of 392 000 hectares of irrigated and rainfed land were registered for maize production, compared to the initial target area of 290 000 hectares. The Command Programme has also been expanded in 2017/18 to include wheat, livestock, soybeans, fisheries and irrigation rehabilitation. In addition, the Government is supporting



1.8 million vulnerable households with subsidized distribution of agricultural inputs.

Overall, maize production in 2018 is expected to decrease compared to the previous year's well above-average level. This decrease would mostly reflect a reduction in yields and, to a lesser extent, an anticipated decrease in the area harvested. However, the 2018 maize output is still preliminarily forecast to remain above the previous five-year average.

Cereal production reached bumper level in 2017

Maize production in 2017 is officially estimated at a well above-average level of 2.2 million tonnes, significantly higher than the drought-reduced output of 2016. The large year-on-year increase is reflective of an expansion in plantings (estimated at about 1.9 million hectares compared to 1.2 million in 2016) and an upturn in yields, instigated by good rains and extensive input support programmes. On a geographic basis, large increases were estimated in the main-producing Mashonaland provinces in the northeast, while significant annual gains were also estimated in Midlands and Masvingo provinces.

Total cereal production in 2017 is estimated at 2.54 million tonnes, more than double the average.

Imports forecast to fall in 2017/18

Total cereal imports are forecast to fall substantially in the 2017/18 marketing year (April/March), mostly on account of the lower requirements for maize (estimated to be below 10 000 tonnes) from external sources, due to the large domestic harvest gathered in 2017. In the previous marketing year, about 1 million tonnes of maize were imported to cover the supply shortfall following the sharply drought-reduced 2016 output.

Maize meal prices stable

Prices of maize meal were generally stable throughout most of 2017, having seasonally declined between May and September. As of December 2017, maize meal prices across the country were below their year-earlier levels. The lower and stable prices largely reflected favourable national supplies. Maize grain prices have begun to rise seasonally since the end of 2017, but still remain lower on a yearly basis.

For the 2017/18 marketing year (April/March), the Government designated the Grain Marketing Board (GMB), a Government parastatal tasked to manage the strategic grain reserves, as the sole buyer of maize grain, procuring the commodity at a fixed price of USD 390 per tonne. The GMB is then selling maize grain at a subsidised price of USD 240 per tonne. So far, with less than two months of the marketing year remaining, a total of 1.2 million tonnes of maize has been procured by the GMB.

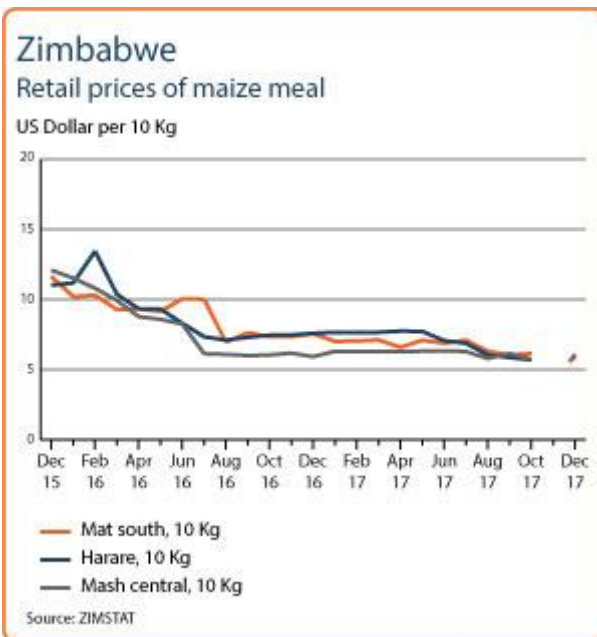
Larger agricultural output improves food security in 2017/18

The results of the 2017 Zimbabwe Vulnerability Assessment Committee's (ZimVACs) evaluation showed a significant decrease in the number of food insecure. During the current peak of the lean period (January-March 2018), about 1.05 million people are estimated to be in need of food assistance, compared to 4.07 million in the previous year. The year-on-year

Zimbabwe
Cereal production

	2012-2016 average	2016	2017 estimate	change 2017/2016
	000 tonnes			percent
Maize	895	512	2 156	321
Sorghum	69	36	182	406
Millet	46	29	107	269
Others	69	59	91	54
Total	1 080	636	2 535	299

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



improvement is primarily on account of the larger 2017 agricultural output and the lower grain prices. The food insecure population is mainly concentrated in Midlands, Masvingo and Matabeleland North provinces.

With cereal production forecast to fall in 2018, food security conditions are expected to worsen in 2018/19. However, the larger carryover stocks for 2018/19 marketing year will help to partially cushion the impact of a fall in cereal production.

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GIEWS Country Brief Zimbabwe

Reference Date: 27-June-2017

FOOD SECURITY SNAPSHOT

- Maize production forecast to increase significantly in 2017 to well above-average level
- Import forecast for grains cut sharply in 2017/18 marketing year
- Food security conditions expected to improve on account of large agricultural output and lower cereal prices

Maize production forecast at bumper level in 2017

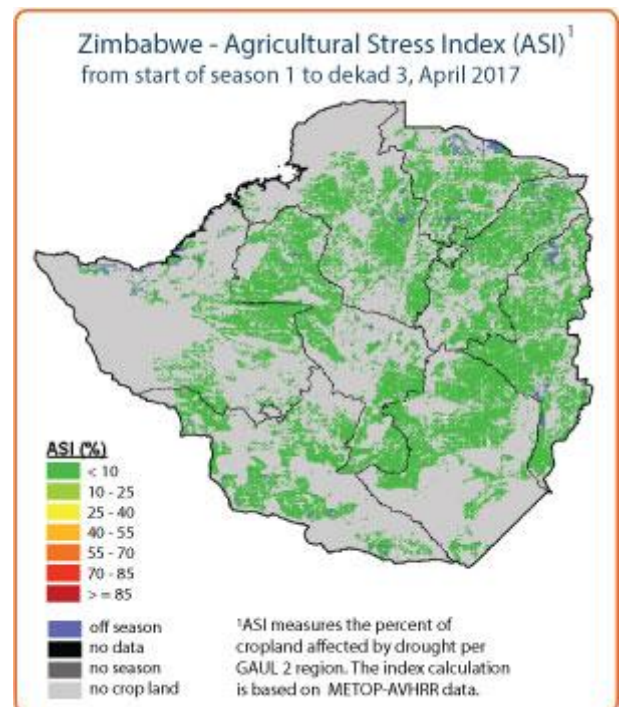
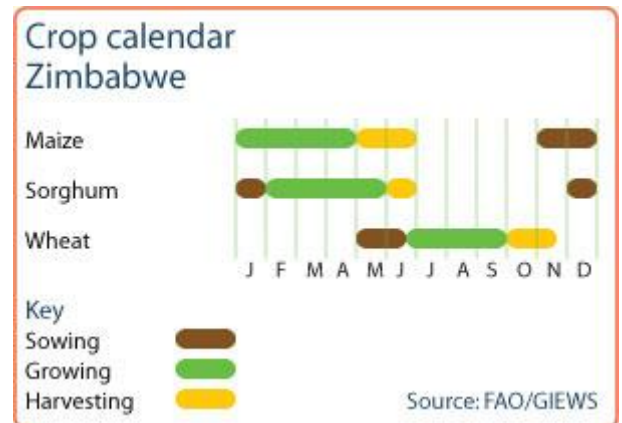
Harvesting of the 2017 summer cereal crops is nearing completion, with the winter wheat crop to be harvested in the last quarter of the year.

Maize production in 2017 is officially forecast at a well above-average level of 2.1 million tonnes, significantly higher than the drought-reduced output of 2016. The large year-on-year increase is reflective of an expansion in plantings (estimated at about 1.9 million hectares compared to 1.2 million in 2016) and an upturn in yields, instigated by good rains and extensive input support programmes. On a geographic basis, large increases are expected in the main-producing Mashonaland provinces in the northeast, while significant annual gains are also forecast in Midlands and Masvingo provinces.

Although most of these increases would originate from the communal farming sector, large-scale farms are also expected to contribute to the steep production gains as they were supported by the Government's Command Agriculture Scheme. Under this programme, large-scale farmers were committed to providing 5 tonnes of maize per hectare to the Government as repayment for inputs and agricultural equipment. This programme is in addition to the Presidential Input Support Scheme that mainly targeted small-scale farmers.

Total cereal production in 2017 is forecast at 2.5 million tonnes, with a significant increase in sorghum production also contributing to this year's improved performance.

Cash crop production is also estimated at a high level in 2017. Production of cotton, a key crop, is estimated at 125 000 tonnes, compared to 36 000 tonnes in 2016. Good weather conditions and the continuation of free input distribution through the Government's support programme are the main drivers behind



this year's growth.

Imports forecast to decrease significantly in 2017/18

As a result of the large increase in domestic production in 2017, the import forecast for the 2017/18 marketing year (April/March) has been cut significantly to less than 5 000 tonnes, which would mainly consist of informal cross-border trade. Currently the Government has also placed a ban on imports. In the previous marketing year, just under 1 million tonnes of maize were imported to cover the supply shortfall following the sharply drought-reduced 2016 output.

The parastatal Grain Marketing Board (GMB) has been purchasing maize from local producers at a cost of USD 390 per tonne this marketing year. With a current budget of USD 200 million to procure maize, the GMB is set to purchase approximately 0.5 million tonnes to replenish national reserves.

Maize meal prices at low and stable levels

Prices of maize meal continued to remain stable at the beginning of 2017 and were well below their year-earlier levels as of April. The strengthening of the US dollar (the main currency used in the country) against the rand of South Africa (a key source of grain imports) was a significant contributing factor for the low and stable prices during 2016, particularly given the increased level of imports in total domestic supplies. However, with a more stable exchange rate in 2017, prices have remained more or less unchanged in recent months.

Liquidity constraints in the country had also dampened domestic demand and constrained economic performance, lessening inflationary pressure, while the larger agricultural output in 2017 is likely to sustain the downward pressure on food prices.

Food security situation expected to improve in 2017/18

The results of the 2017 Zimbabwe Vulnerability Assessment Committee's (ZimVACs) evaluation are expected to be released in July. Given the significant improvement in the performance of the agriculture sector and the lower grain price, food security conditions are similarly expected to improve in 2017/18. Based on the Government's latest crop assessment, at the provincial level, this year's cereal harvest is expected to be sufficient to cover the population's consumption needs until at least the end of the year. However, in some districts of Midlands, Masvingo and Matabeleland North provinces, production is forecast to only cover the next four to six months.

In 2016/17, ZimVAC estimated that 4.07 million people (44 percent of the rural population) were food insecure at the peak of the lean period between January and March 2017, about 44 percent higher than the 2.83 million people estimated in the first quarter of 2016.

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Zimbabwe

Cereal production

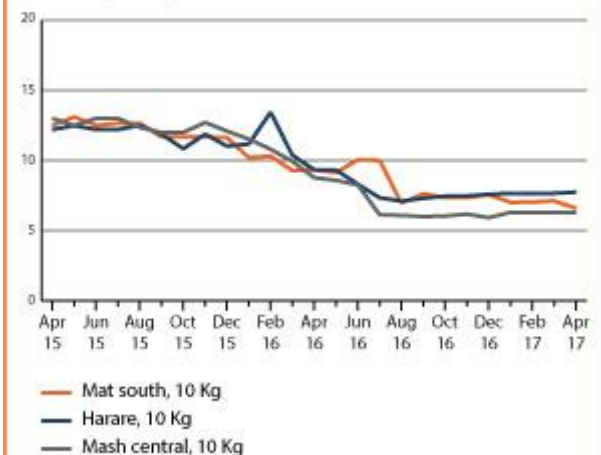
	2012-2016	2016	2017 forecast	change
	average			2017/2016
	000 tonnes			percent
Maize	895	512	2,156	321
Sorghum	69	36	182	406
Millet	46	29	107	269
Others	69	59	91	54
Total	1,080	636	2,535	299

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Zimbabwe

Retail prices of maize meal

US Dollar per 10 Kg



Source: ZIMSTAT



GIEWS Country Brief Zimbabwe

Reference Date: 07-March-2017

FOOD SECURITY SNAPSHOT

- Forecasts point to production recovery in 2017, but fall army worm outbreak and heavy rains likely to restrain bigger gains
- Maize imports rise in 2016/17 to boost domestic supplies following sharp production decrease in 2016
- Estimated 4.1 million people food insecure in rural areas, but conditions expected to improve with 2017 harvest beginning in April

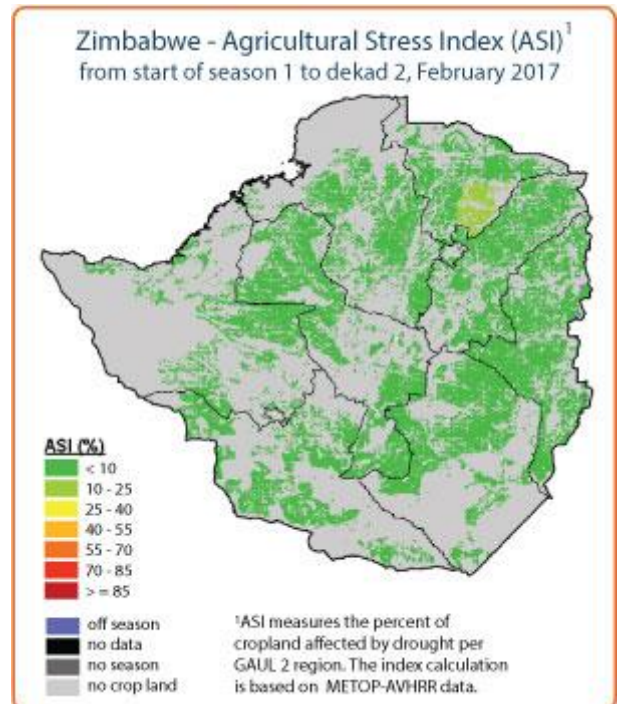
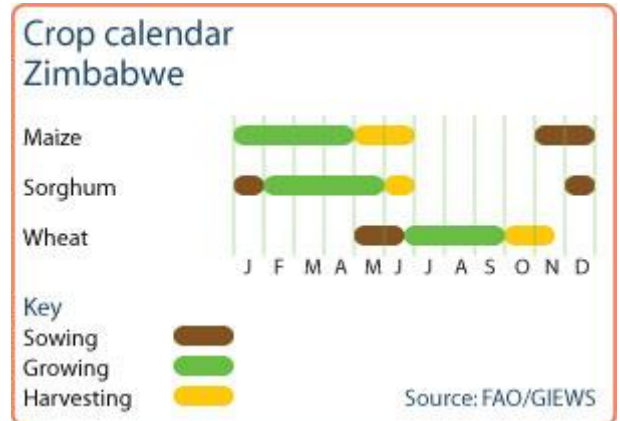
Maize production in 2017 forecast to recover from 2016's drought-reduced output

Harvesting of the 2017 cereal crops is expected to commence in April, with the bulk of the maize crop to be harvested in May and June. Early production forecasts for maize point to a strong rebound from last year's reduced output. The more positive outlook this season mostly reflects wetter conditions, which are predicted to continue until harvesting. Additionally, an increase in the area planted to maize, estimated at a near-average level of 1.2 million hectares, is also anticipated to contribute to a larger output in 2017. However, although the above-average cumulative rainfall volumes since October 2016 have benefitted crop and pasture development, heavy rains have also resulted in localized flooding causing crop losses, while waterlogging is likely to constrain yield potentials in the affected areas, particularly for the late-planted crop that is more susceptible to the impact of excessive moisture. In addition, an outbreak of fall army worm, an invasive species to the subregion, is likely to also further limit year-on-year production gains; an estimated 130 000 hectares of maize have been affected.

Production of cash crops, mainly cotton and tobacco, is also foreseen to rise in 2017, mainly supported by an expansion in the sown area.

Imports increase in 2016/17 to bridge larger national deficit

On account of the sharply reduced 2016 cereal harvest and minimal carryover stocks, the cereal maize requirement for the 2016/17 marketing year (April/March) was estimated to be close to 1 million tonnes (assuming an unchanged per caput consumption rate). As of January 2017, approximately 0.7 million



tonnes of maize was estimated to have been imported, the bulk of which originated from Mexico, South Africa and Zambia.

Lower maize meal prices

The country experienced deflation in 2016, with an annual rate of -1 percent in December. Prices of maize meal declined in the first half of 2016 and had since remained stable through to the end of the year. The impact of the US dollar's strength (the main currency used in the country), which had contributed to lowering food prices, weakened in recent months due to an appreciation of South Africa's (a main trading partner) currency. However, the decline in maize prices in South Africa, which has supplied about 160 000 tonnes of maize since May 2016, has contributed to maintain stable prices. Liquidity constraints in the country had also dampened domestic demand and constrained economic performance, lessening inflationary pressure in 2016.

Increased numbers of food insecure in 2016/17

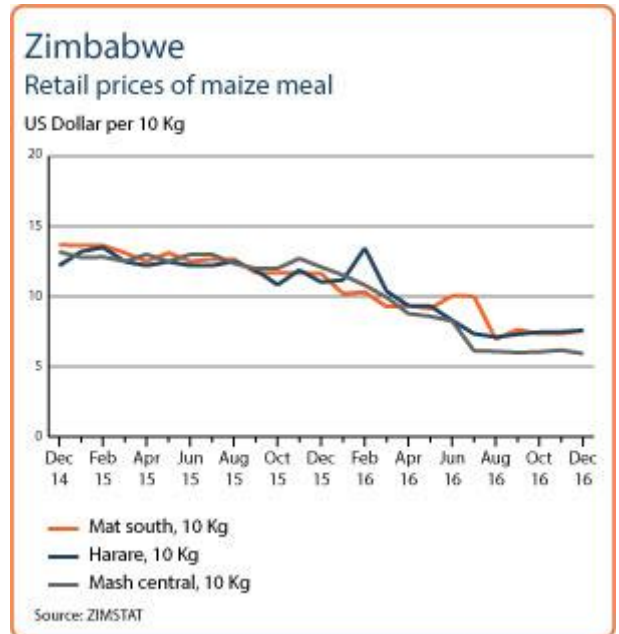
Food security conditions deteriorated significantly in 2016/17, driven by the drought-reduced agricultural production, which followed an already poor 2015 agricultural campaign. The Zimbabwe Vulnerability Assessment Committee (ZimVAC) estimates that 4.07 million people (44 percent of the rural population) are food insecure in the current peak of the lean period, between January and March 2017, about 44 percent higher than the 2.83 million people estimated in the first quarter of 2016. Government and partner organizations are targeting the entire food insecure population for assistance, with both in-kind as well as cash-based programmes.

The Government declared a state of disaster on 2 March following the impact of the floods, which left an estimated 2 000 people homeless, while infrastructure damage was also reported; the most affected districts were in Matabeleland North. With weather forecasts indicating a continuation of above-average rains until May, there is a risk of further flooding.

Zimbabwe
Cereal production

	2011-2015 average	2015	2016 estimate	change 2016/2015 percent
	000 tonnes			
Maize	1 083	742	512	-31
Sorghum	81	40	36	-10
Millet	52	27	29	7
Others	70	61	59	-3
Total	1 287	870	636	-27

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets





GIEWS Country Brief Zimbabwe

Reference Date: 16-November-2016

FOOD SECURITY SNAPSHOT

- Above-average rainfall conditions forecast for 2016/17 cropping season
- Drought-affected 2015/16 season resulted in 31 percent decrease in maize output
- Increased quantities of cereal imports required, with grain expected to be also sourced from outside subregion
- Food insecurity worsened significantly with food insecure population forecast to rise to about 4 million people in first quarter of 2017

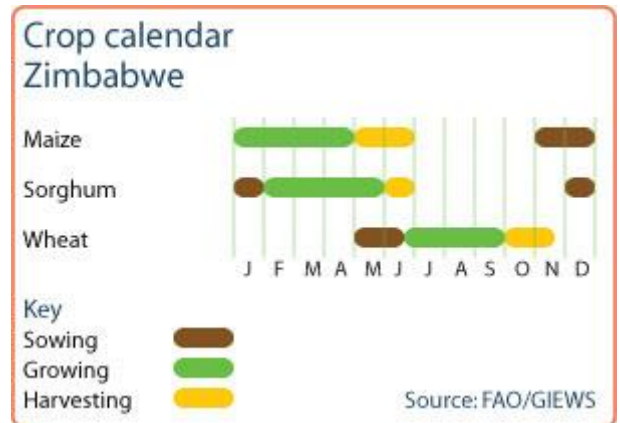
Forecasts point to enhanced chance of above-average rainfall conditions during 2016/17 cropping season

Planting of the 2017 cereal crops is underway and is expected to be completed early next year. Rainfall forecasts for the 2016/17 main summer cropping season (November-June) indicate an enhanced chance for above-average rainfall conditions; this is in contrast to the severe dryness that adversely affected the previous season.

The agricultural productive capacity of farming households is expected to be further constrained this year, particularly in regard to access to fertilizer and seed supplies that is reflective of two consecutive years of below-average harvests. In response, FAO is supporting households in the most affected southern districts with agricultural inputs, as well as subsidized stock feed. The Government is also continuing to facilitate improved access to agricultural inputs, targeting 800 000 vulnerable smallholder farmers through the Presidential Input Scheme as well as commercial farmers through the Command Agriculture Programme. In addition the Government is investing in the rehabilitation of irrigation infrastructure. Although an expansion in 2017 maize plantings is not foreseen, based on the current weather forecast, yields for the 2017 crop are expected to rise above the reduced levels of 2016.

El Niño drought caused decline in 2016 cereal output

Total cereal production is estimated at about 636 000 tonnes, 27 percent down from the drought-reduced 2015 harvest and approximately half of the previous five-year average. The bulk of



Zimbabwe
Cereal production

	2011-2015 average	2015	2016 estimate	change 2016/2015
	000 tonnes			percent
Maize	1 083	742	512	-31
Sorghum	81	40	36	-10
Millet	52	27	29	7
Others	70	61	59	-3
Total	1 287	870	636	-27

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

the decrease reflects a reduced maize harvest, estimated at 512 000 tonnes, 31 percent down on a year-on-year basis. Aggregate small grains (millet and sorghum) production is also estimated to be at a well below-average level, although only slightly down from the previous year's output. The poor 2016 production was largely driven by El Niño-induced drought conditions that particularly affected southern and western provinces.

Larger import needs following two consecutive seasons of well below-average harvests

On account of the reduced 2016 cereal harvest and minimal carryover stocks, the cereal maize requirement for the 2016/17 marketing year (April/March) is estimated to be close to 1 million tonnes (assuming an unchanged per caput consumption rate). The country is expected to satisfy a large proportion of their import needs with supplies from South Africa and Zambia, which has, however, recently implemented an export ban. Given the limited exportable availabilities within the subregion, imports are also expected to be sourced from outside of Southern Africa.

Although the strong US dollar (the country's dominant currency in the multi-currency system) has lessened imported inflation, particularly from South Africa, liquidity constraints have dampened domestic demand and constrained economic performance. In response, the Government is planning to issue bond notes in November to boost liquidity and help augment the country's import capacity.

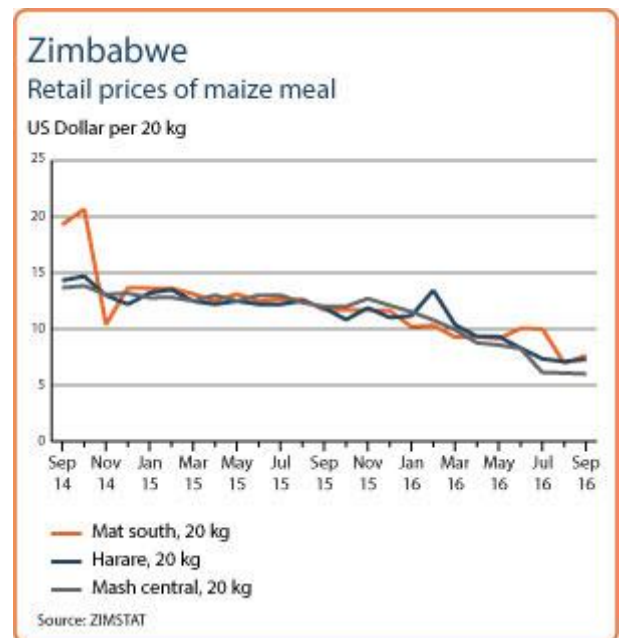
Maize meal prices decrease

Maize meal prices, in contrast to neighbouring countries, have been stable and declining during much of 2016. In September 2016, prices of maize meal were between 40 and 55 percent lower than their year-earlier values. Overall, the country has experienced deflationary conditions in 2016 that were mainly sustained by the stronger US dollar compared to the South Africa rand (the country's main trading partner) and liquidity constraints that has contributed to limiting demand.

Increased numbers of food insecure in 2016/17

Food security conditions deteriorated significantly in 2016, driven principally by the drought-reduced agricultural production, which followed an already poor 2015 agricultural campaign. The consecutive poor harvests have severely eroded households' productive capacity, increasing their vulnerability to further shocks. The Zimbabwe Vulnerability Assessment Committee (ZimVAC) projected that an estimated 4.07 million people (44 percent of the rural population) would be food insecure during the peak of the lean period, between January and March 2017, approximately 44 percent higher than the 2.83 million people estimated in the first quarter of 2016. In the current October-December period, 33.1 percent (approximately 3 million people) of the rural population are estimated to be food insecure. The highest rates of food insecurity are in the provinces of Midlands, Masvingo and Matabeleland North, corresponding to the areas that were most affected by seasonal dryness; these provinces also had the highest levels of food insecurity in 2015/16.

Government and partner organizations are targeting the entire food insecure population for assistance, with both in-kind as well



as cash-based programmes, which have been harmonized between the implementing organizations so that the transfer value is USD 7, reflecting the latest market assessments.



GIEWS Country Brief Zimbabwe

Reference Date: 18-July-2016

FOOD SECURITY SNAPSHOT

- El Niño-related drought causes sharp reduction in 2016 cereal output
- Increased cereal import requirements in 2016/17
- Approximately half of rural population in southern provinces are food insecure on account of drought impact

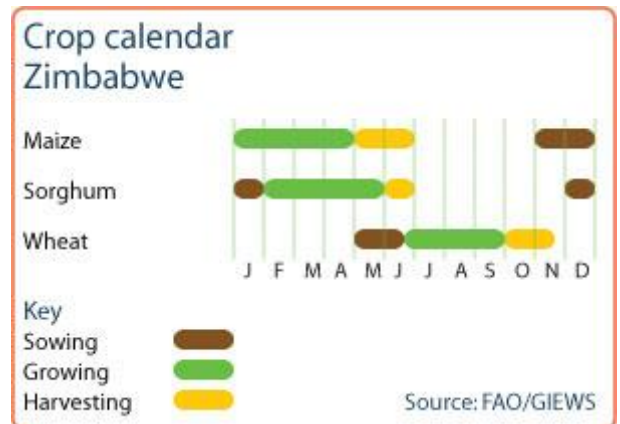
Sharply lower crop production in 2016, driven by El Niño drought conditions

Harvesting of the 2016 cereal crop was recently concluded in June. Total cereal production is estimated at about 636 000 tonnes, 27 percent down from the already drought-reduced 2015 harvest and approximately half of the previous five-year average. The bulk of the decrease reflects a reduced maize harvest, forecast at 512 000 tonnes, 31 percent below 2015's level. Aggregate small grains (millet and sorghum) production is also estimated to be at a well below-average level, although only slightly down from the previous year's output. The poor 2016 production was largely driven by El Niño-induced drought conditions that particularly affected southern and western provinces. Higher-than-normal temperatures compounded the impact of the suppressed seasonal rainfall, resulting in crop failures, lower yields and a reduction in the area harvested.

Similarly, the drought resulted in the loss of 23 000 cattle in the most affected districts, while the low water supplies also affected power generation and potable water availability from boreholes for human consumption.

Cereal import requirements in 2016/17 forecast to rise significantly, on account of two consecutive well below-average harvests

On account of the reduced 2016 cereal harvest and minimal carryover stocks, the cereal import requirement for the 2016/17 marketing year (April/March) is estimated to be close to 1 million tonnes (assuming an unchanged per caput consumption rate). Given the tight supply situation and limited exportable availabilities within the region, the bulk of the maize import requirement is expected to be sourced from outside of southern Africa, while some quantities will also be procured from South Africa and Zambia; approximately 45 000 tonnes of maize, mostly white, were imported from South Africa since May.



Zimbabwe
Cereal production

	2011-2015 average	2015	2016 estimate	change 2016/2015
	000 tonnes			percent
Maize	1 083	742	512	-31
Sorghum	81	40	36	-10
Millet	52	27	29	7
Others	70	61	59	-3
Total	1 287	870	636	-27

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Although the strong US dollar (the country's main currency) against neighbouring countries' currencies has helped to lessen imported inflation, particularly from South Africa, recent shortages of US dollars in the domestic market is constraining economic performance. This prompted the Government and the Reserve Bank to implement a number of measures to address the low currency supplies and with the objective to boost domestic production, including restricting foreign currency withdrawals and the introduction of import licences for a number of food items, including some cereal products. Increased tobacco sales in 2016, up 6 percent compared to 2015, are expected to moderately boost US dollar supplies.

Maize meal prices remain stable but at high levels

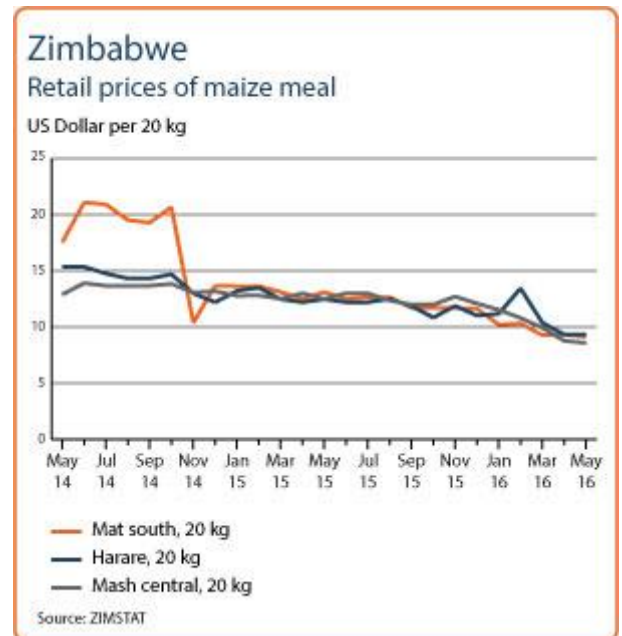
Maize meal prices, particularly when compared to neighbouring countries, have been stable and declining during much of 2016. In May 2016, prices levelled off and were between 15 and 35 percent lower than their year-earlier values. The strength of the US dollar has contributed to the stable trend in 2016, however, prices of maize meal are generally higher than in neighbouring Zambia.

Food insecurity worsen significantly in 2016 due to drought

The overall food security situation has deteriorated significantly in 2016, driven principally by the drought-reduced agricultural production. This follows an already poor 2015 agricultural campaign. The consecutive poor harvests have severely eroded households' productive capacity, increasing their vulnerability to further shocks.

The recent evaluation by the Zimbabwe Vulnerability Assessment Committee (ZimVAC) projected that during the peak of the lean period, between January and March 2017, an estimated 4.07 million people (44 percent of the rural population) would be food insecure. This is approximately 44 percent higher than the 2.83 million people estimated in the first quarter of 2016. During the current July-September period, 20 percent of the rural population are estimated to be food insecure. The highest rates of food insecurity are in the provinces of Midlands, Masvingo and Matabeleland North, corresponding to the areas that were most affected by seasonal dryness; these provinces also had the highest levels of food insecurity in 2015/16.

Government and partner organizations are targeting the entire food insecure population for assistance. Approximately USD 723 million are required to address the food security and agriculture needs, however, only 5 percent of the total financial requirements have been secured.



Reference Date: 08-January-2016

FOOD SECURITY SNAPSHOT

- Delayed and erratic rains adversely impact early development of 2016 cereal crops and hinder cropping activities
- Large volumes of maize imported from Zambia, on account of lower domestic production in 2015
- Food insecurity remains acute in southern provinces

Cereal production outlook in 2016 has weakened due to El Niño-associated dry conditions

Planting of the 2015 maize crop is still ongoing in some locations due to the late start of seasonal rains, with the bulk of harvesting activities expected to commence from May.

Rains since the start of the cropping season in October/November have been erratic and, despite heavier downpours in mid-December, cumulative precipitation levels remain below-average. Higher temperatures have also exacerbated the impact of rainfall deficits. As a result, vegetation conditions are generally below-normal across most of the country, implying retarded crop development, with some areas in the south reportedly already experiencing crop failure. The poor start to the cropping season has caused a reduced rate in maize plantings, with plantings about one-third lower as of December 2015 compared to the same period of the previous year, which could result in a contraction in the total planted area. Overall, current production prospects for the 2016 cereal crops are unfavourable.

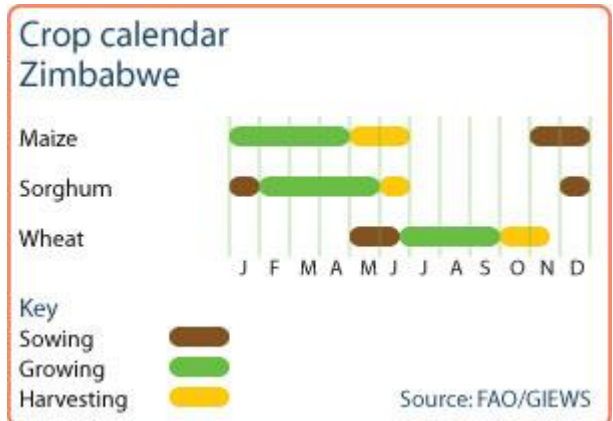
Dry spell caused a sharp decrease in 2015 cereal output

Total cereal production in 2015 is estimated at 870 000 tonnes, about 50 percent below the 2014 output and approximately 40 percent lower than the five-year average. The steep decline is mostly the result of an extended dry period in the first quarter of 2015 that resulted in crop losses and a reduction in yields. The less productive southern and western provinces of Midlands, Masvingo, Matabeleland North and South, were the worst-hit areas, with maize harvests decreasing between 66 and 84 percent compared with the 2014 outputs. Maize, sorghum and millet production registered declines of 50 percent and more.

Cash crop production in 2015 was also estimated at lower levels compared to the previous year. Production of tobacco and cotton, the two main cash crops, decreased by 26 and 41 percent, respectively, mostly reflecting the erratic weather conditions.

Significant imported volumes of maize in 2015/16

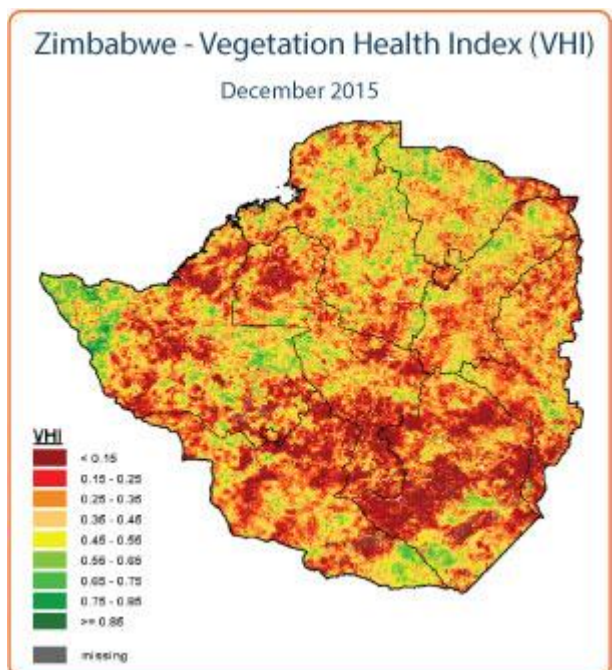
As a result of the reduced 2015 maize harvest, the import requirement for the 2015/16 marketing year (April/March) is estimated between 650 000 and 700 000 tonnes (assuming an unchanged per caput consumption rate), well above the reduced level of last year. As of October, approximately 400 000 tonnes were imported from Zambia, at the rate of 57 000 tonnes per month. If this rate would continue until



Zimbabwe Cereal production

	2010-2014 average	2014	2015 estimate	change 2015/2014
	000 tonnes		percent	
Maize	1,206	1,456	742	-49
Sorghum	100	137	40	-71
Millet	59	88	27	-69
Others	74	72	61	-15
Total	1,439	1,753	870	-50

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



March 2016, the country would be expected to fully satisfy its consumption needs.

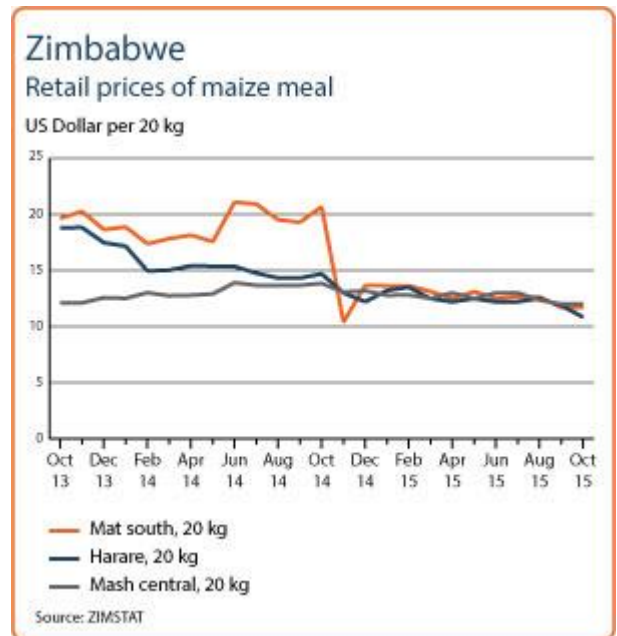
Maize meal prices remain stable

Prices of maize meal were generally below their year-earlier levels as of October 2015 and had remained stable since January, with limited disparities between regions. The overall stable trend has been helped by large import volumes and generally stable prices in Zambia. However, upward pressure is expected in the coming months as national stocks decrease and recently increasing prices in Zambia filter through to the country.

Lower 2015 harvest worsens food insecurity

An estimated 1.49 million people (16 percent of the rural population) are food insecure in the January-March 2016 period, up from 0.56 million in the previous year, according to the Zimbabwe Vulnerability Assessment Committee's 2015 evaluation. The sharp increase is largely on account of the reduced cereal production and consequently lower households stocks, with the highest rates of food insecurity in the Midlands, Masvingo, Matabeleland North and South, corresponding to the provinces that registered the largest maize production decreases. Government and the UN have been distributing food to the most vulnerable families.

A consecutive poor cereal harvest in 2016, resulting from the El Niño-associated dry weather, could further worsen the poor food security situation.



Reference Date: 24-July-2015

FOOD SECURITY SNAPSHOT

- Poor rains in 2014/15 result in sharply reduced 2015 cereal harvest, with significant declines recorded in southern provinces
- Larger maize import requirement estimated in 2015/16, reflecting lower domestic production
- Food insecurity increases acutely in southern provinces

Sharp fall in 2015 cereal production

The 2015 maize crop, harvested in June, is estimated at 742 226 tonnes, about 50 percent below the bumper 2014 output and approximately one-third lower than the five-year average. The steep decline is mostly the result of an extended dry period in the first quarter of 2015 that resulted in crop losses, mainly affecting southern areas and a reduction in yields; the national average 2015 yield was one-third below last year's good level. The less productive southern and western provinces of Midlands, Masvingo, Matabeleland North and South, were the worst-hit areas, with harvests decreasing between 66 and 84 percent compared with the 2014 outputs. In main producing northern provinces, production decreases were less severe on account of more favourable weather conditions.

Sorghum and millet production in 2015 are estimated to have decreased by 71 and 69 percent, respectively. Production of all other food crops also declined, except Irish potatoes which registered a small 5 percent increase owing to a minor expansion in plantings and similar yields to the previous year.

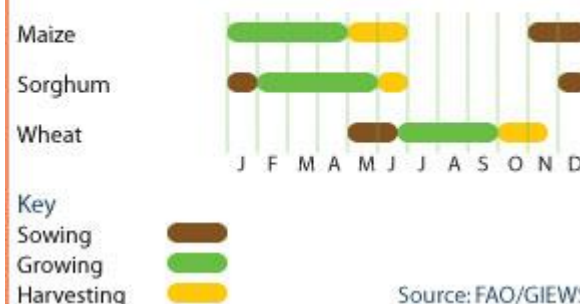
Overall, national cereal production in 2015 is estimated at about 870 000 tonnes, a significant 40 percent below the average and about half the level of the bumper 2014 crop.

Cash crop production in 2015 was also estimated at lower levels compared to the previous year. Production of tobacco and cotton, the two main cash crops, decreased by 26 and 41 percent, respectively. Most cash crops also registered production declines this year, mainly on account of the erratic weather conditions. However, sugar cane production was estimated to have increased marginally.

Maize imports in 2015/16 forecast to increase significantly

For the 2015/16 marketing year (April/March), the maize import requirement, which on average accounts for about two-thirds of the country's cereal import needs, is estimated at approximately 700 000 tonnes (assuming an unchanged per caput consumption rate), well above the reduced level of last year. This year's high estimate is a result of the sharply reduced 2015 maize harvest and consequently larger national deficit. With exports forecast to decline in the subregion's main supplier, South Africa, it is expected that Zimbabwe will mainly import from Zambia, where maize exports are forecast to reach close to 800 000 tonnes in 2015/16.

Crop calendar Zimbabwe



Zimbabwe

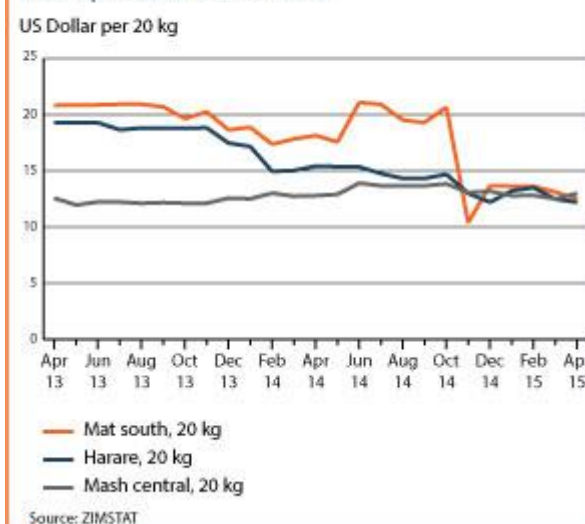
Cereal production

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Others	74	72	61	-15
Total	1,439	1,753	870	-50

Note: percentage change calculated from unrounded data. Source: FAO/GIEWS Country Cereal Balance Sheets

Zimbabwe

Retail prices of maize meal



Stable maize meal prices, but increasing grain prices

Prices of maize meal were generally below their year-earlier levels as of April 2015 and had remained stable since January, with minimal disparities between regions.

In southern provinces, maize grain prices increased between April and July, most notably in Matabeleland South where prices doubled over this period. The poor cereal output in 2015 and tighter supply outlook is expected to exert strong upward pressure on prices in 2015/16 compared to the previous year. Furthermore, with households likely to increase their reliance on market supplies, further upward pressure is expected to be applied to maize prices.

Food insecurity worsens in 2015/16 due to the poor maize harvest

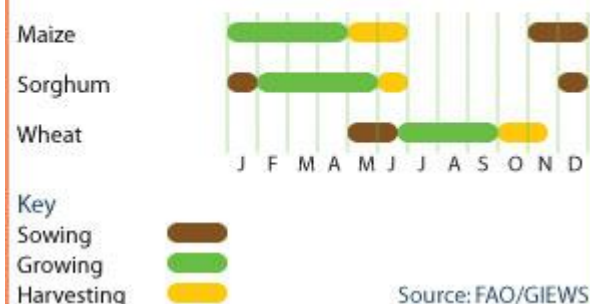
Following a strong improvement in 2014/15, the poor performance of the 2015 cereal crops resulted in a deterioration in food security conditions. The recently-released results from the Zimbabwe Vulnerability Assessment Committee's 2015 evaluation indicate that 16 percent (1.49 million people) of the rural population will be food insecure during the peak hunger period between January and March 2016, compared to 6 percent (564 599 people) in the first quarter of 2015. The higher prevalence this year mostly reflects the poor cereal harvest and consequently lower households stocks, with the highest rates of food insecurity in the Midlands, Masvingo, Matabeleland North and South, corresponding to the provinces that registered the largest maize production decreases. Compounding the situation are the increasing maize grain prices in southern provinces, while the reduced cash crop production is expected to constrain income levels, further restraining food access.

Reference Date: 17-March-2015

FOOD SECURITY SNAPSHOT

- Cereal production in 2015 forecast to decrease, largely due to drier weather in southern parts of the country
- Reflecting strong recovery in 2014 cereal output, import requirements decreased, while prices remained below their year-earlier levels
- Food security improved significantly in 2014/15, with an estimated 76 percent decline in number of people requiring assistance. However, conditions in 2015/16 are likely to be aggravated in areas where crop production is expected to decline

Crop calendar Zimbabwe



Mixed production prospects for 2015 cereal crops

Harvesting of the 2015 cereal crops will begin in May 2015 and current conditions point to mixed production prospects. Following a late onset of seasonal rains that delayed plantings, generally favourable precipitation was received in the more productive northern provinces and cereal production in these parts is expected to be average to above-average. However, in southern regions, which are often subject to prolonged dry spells, production is expected to decline from the good levels of the previous year due to generally below-average rains. Weather forecasts for March-May point to an increased likelihood that southern provinces will receive normal to below-normal rains, implying limited potential for crops to recover from water stress.

Overall, national production is expected to decrease from last year's bumper harvest on account of the anticipated declines in the south, but to remain close to the average. The Government's first crop assessment is expected to be released soon, and will provide further details on expected cereal production in 2015.

Strong recovery in 2014 maize production

In 2014, maize production recovered strongly, increasing by 82 percent to 1.46 million tonnes from the previous year's drought-reduced output. Both increased plantings and higher yields contributed to the larger output. Production of sorghum and millet also registered sharp rebounds, reflecting larger plantings. Overall, cereal production was estimated at 1.75 million tonnes in 2014.

Lower maize import requirements estimated in 2014/15

Reflecting the bumper maize output in 2014, import requirements in the 2014/15 marketing year (April/March) are estimated at approximately 200 000 tonnes, significantly below the 500 000 tonnes estimated in the previous year.

Prices of maize remained lower than a year earlier

Prices of maize are generally below their year-earlier levels as of January 2015, reflecting the improved supply situation. In addition, lower fuel prices and a stronger the US dollar (the most used currency in the country) against the South African rand, where a large proportion of food imports are sourced from, have also contributed to lessening

Zimbabwe

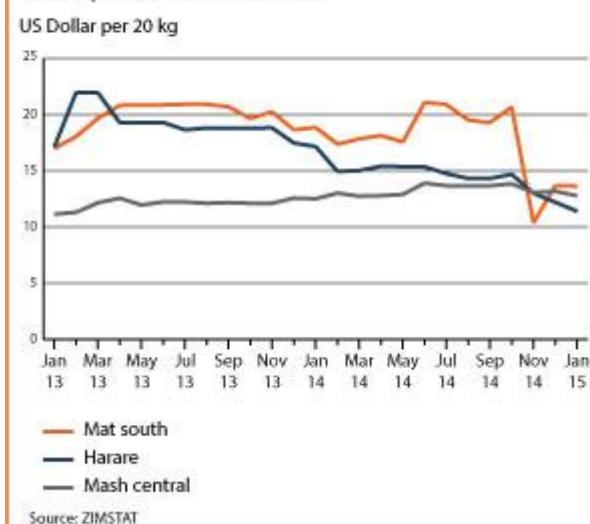
Cereal production

	2009-2013 average	2013	2014 estimate	change 2014/2013
	000 tonnes		percent	
Maize	1,168	799	1,456	82
Sorghum	103	69	137	99
Millet	57	42	88	110
Others	77	78	68	-13
Total	1,405	988	1,749	77

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Zimbabwe

Retail prices of maize meal



upward price pressure.

Food security improved, but conditions likely to worsen in 2015/16

The food security situation improved significantly in 2014/15, largely reflecting the better supply situation and lower prices of maize that have contributed to improving food access. Between January and March 2015, the number of food insecure people is estimated at about 565 000 people, down sharply from the 2.2 million persons estimated in January-March 2014. The provinces of Matabeleland North and South were assessed to have the highest proportion of food insecure households. Food insecurity is likely to be aggravated in 2015/16, particularly in southern areas, where crop production is expected to decrease.

Reference Date: 16-October-2014

FOOD SECURITY SNAPSHOT

- Planting of 2015 cereal crops is about to commence, with generally positive rainfall forecast
- 2014 maize output recovered strongly from drought-reduced harvest of the previous year
- Reflecting improved supply situation, maize prices fell sharply and, in August, were below their year-earlier levels
- Food security improves significantly in 2014/15, with an estimated 76 percent decline in number of people requiring assistance

Generally favourable rains forecast in 2014/15 cropping season

Planting of cereal crops, for harvest from May 2015, is expected to commence in November. According to the Southern African Regional Climate Outlook Forum (SARCOF), forecasts for the October 2014-March 2015 period indicate an increased probability of normal to above-normal rainfall across the country. However, forecasts generated by national weather institutions point to a higher chance of normal to below-normal rains in western and southern provinces in the first quarter of 2015; although these areas do not constitute the large producing provinces, reduced rains could negatively impact on crop production and tighten local cereal supplies.

Government support for agriculture production provides seeds and fertilizers to 1.6 million cereal farmers, and input support packages to an additional 1.6 million soybean and cowpea farmers. In regard to cash crops, 300 000 cotton farmers are expected to receive seeds, while 1.6 million livestock farming households will be provided with anti-parasitic drugs.

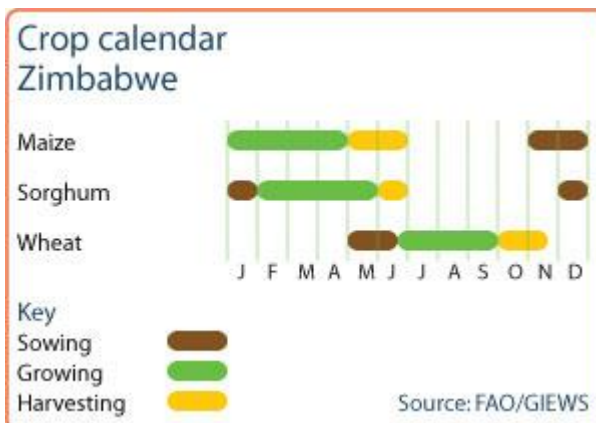
Strong recovery in 2014 maize production

Maize production recovered strongly in 2014, increasing by 82 percent to 1.43 million tonnes from the previous year's drought-reduced output. Both increased plantings and higher yields contributed to the larger output. Production of sorghum and millet also registered sharp rebounds, reflecting larger plantings. Overall, cereal production is estimated at 1.75 million tonnes, including the winter wheat crop, currently being harvested.

Tobacco production increased by 16 percent to 193 366 tonnes in 2014, following an estimated 21 percent growth in plantings that more than compensated for a small decline in yield. This contrasts with a 16 percent contraction in the cotton output, caused by a 14 percent decline in plantings, as yields remained virtually unchanged.

Lower maize import requirements estimated in 2014/15

Given the significant production gains in 2014, a sharp decline in maize imports is forecast in the 2014/15 marketing year (April/March). Imports are expected to be near 200 000 tonnes to satisfy domestic requirements, assuming a replenishment of stocks following a draw-



Zimbabwe Cereal production

	2009-2013 average	2013	2014 estimate	change 2014/2013
	000 tonnes		percent	
Maize	1,168	799	1,456	82
Sorghum	103	69	137	99
Millet	57	42	88	110
Others	77	78	68	-13
Total	1,405	988	1,749	77

Note: percentage change calculated from unrounded data.
 Source: FAO/GIEWS Country Cereal Balance Sheets



down in the previous year. Maize imports in 2013/14 (April/March) were estimated at approximately 500 000 tonnes.

Maize prices declined steeply

Reflecting the improved supply situation in 2014, prices of maize declined sharply between March and July. In August, at USD 0.29 per kg, maize prices in Harare were about 15 percent below their year-levels. Lower prices in South Africa, where a large proportion of imports are sourced from, have also exerted some downward price pressure.

Significant improvement in food security

According to the latest national vulnerability assessment committee's (ZimVAC) report, released in September, the 2014/15 food security situation has improved significantly, mainly reflecting the larger 2014 cereal output. Lower prices of maize have also improved food access. Currently, between October and December 2014, an estimated 330 972 persons (in rural areas) are not able to meet their annual food requirements. This number is projected to increase during the peak lean period (January to March 2015) to 564 599 people, down sharply from the 2.2 million persons estimated in January-March 2014. The provinces of Matabeleland North and South were assessed to have the highest proportion of food insecure households.

Reference Date: 13-March-2014

FOOD SECURITY SNAPSHOT

- Favourable production prospects for the 2014 maize crop
- Significant volumes of maize imported from South Africa in the current 2013/14 marketing year (April/March)
- High domestic maize prices following low 2013 maize output and high prices in South Africa
- The number of food insecure persons increased to 2.2 million in the first quarter of 2014 compared to 1.67 million in same period in 2013

Production prospects point to an above average 2014 maize crop

Harvesting of the 2014 maize crop is expected to begin in April/May, and current production prospects remain favourable. Preliminary planting estimates for maize indicate an 18 percent expansion, to 1.66 million hectares, based on the Government's First Crop and Livestock Assessment in February. If good rains persist until the harvest period, an above-average crop is foreseen. In addition to favourable climatic conditions, generally timely maize plantings ensured sufficient growing time for crops, while farmers benefited from assistance from both the Government and humanitarian community, with an estimated 1.6 million farmers receiving maize seed. However, just under half of the targeted quantity of fertilizer under the support programme was distributed, which may limit yield potentials in some parts. Furthermore, heavy rains in the first quarter of 2013 caused some flood damage to crops. Production of sorghum and millet are also expected to increase on last year's good outputs due to larger plantings.

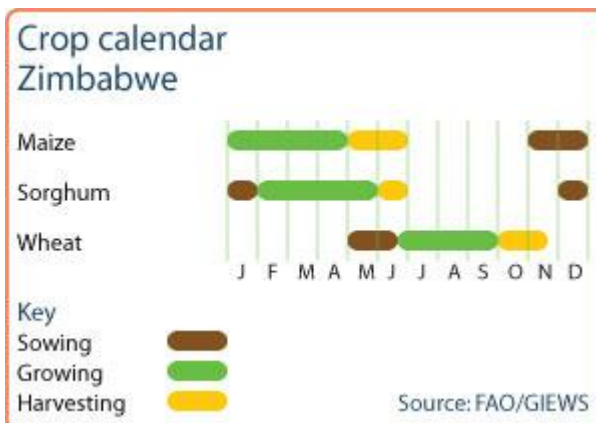
Tobacco production is anticipated to increase in 2014, following an estimated 21 percent growth in plantings. This contrasts with a 16 percent contraction in the cotton area, a second consecutive yearly fall.

South Africa supplies the bulk of import requirements

Maize import requirements increased in the 2013/14 marketing year (April/March) due to the sharply reduced 2013 maize harvest, 17 percent below the previous year's below-average level. South Africa has become the county's main supplier of maize following the reduced exportable surplus in Zambia. As of the end of February, approximately 230 000 tonnes of maize were imported from South Africa, while small volumes were also imported from Zambia.

Prices of maize increased at the end of 2013

The low domestic 2013 harvest and high maize prices in South Africa have put upward pressure on prices. In January 2014, prices of maize reached USD 0.51 per kg, about 75 percent above the previous year's level. However, the depreciation of the Rand against the US dollar is expected to have helped lessen imported inflationary pressure, given the large consignments of maize and food from South Africa.



Zimbabwe Cereal production

	2008-2012 average	2012	2013 estimate	change 2013/2012
	000 tonnes		percent	
Maize	1,138	968	799	-17
Sorghum	105	65	69	6
Millet	56	44	55	25
Others	78	79	78	-1
Total	1,376	1,156	1,001	-13

Note: percentage change calculated from unrounded data.
 Source: FAO/GIEWS Country Cereal Balance Sheets



Food security deteriorates in first quarter of 2014

The national vulnerability assessment committee (ZimVAC) estimated that 2.2 million persons (25 percent of the rural population) will be food insecure until the start of the main harvest in April 2014, mainly as a result of the lower domestic production in 2013. The current level is a significant increase compared to the 1.67 million persons assessed to be food insecure in the first quarter of 2013. Provinces in the south and west recorded the highest rates of food insecurity, reflecting poor cereal harvests in 2013. Food assistance is currently being provided through the Seasonal Targeted Assistance (STA) programme. However, funding shortfalls limited the operations of the programme with half-rations being distributed to approximately 1 million people. The start of the early harvests in March is expected to improve food security conditions.

Reference Date: 03-February-2014

FOOD SECURITY SNAPSHOT

- Overall favourable production prospects for the 2014 maize crop
- Large volumes of maize imported from South Africa in the 2013/14 marketing year (April/March)
- Maize prices were generally stable in 2013, but above levels of previous year
- The number of food insecure persons increased to 2.2 million in the first quarter of 2014 compared to 1.67 million in same period in 2013

Generally good prospects for 2014 maize crop

Overall, prospects for the 2014 maize crop, for harvest from April/May, are favourable, with generally satisfactory rains received since the start of the planting period in November 2013. Rainfall in the immediate period (February) is forecast to continue at above average levels across most of the country. Although planting estimates are not yet available, an expected recovery in maize production to near average levels is foreseen in 2014, over the reduced output in 2013. Assistance from both the government and humanitarian community for small-scale and communal farmers continued this agricultural season, with approximately USD 150 million budgeted for inputs (including seeds and fertilisers) for an estimated 1.6 million farmers.

Tobacco production is expected to increase further in 2014, as more than 83 000 farmers have registered to grow the crop, up from the 78 000 in the previous cropping season, encouraged by the favourable prices. While a contraction in cotton production is anticipated.

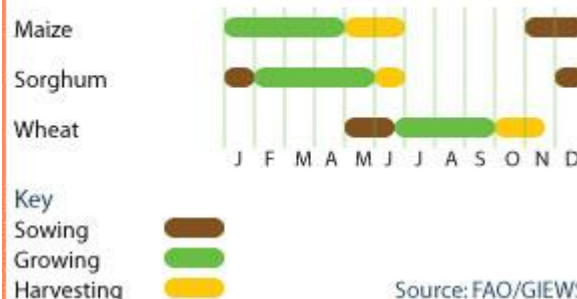
Large volumes of maize imported from South Africa in 2013/14

Following the sharply reduced 2013 maize harvest – approximately 17 percent below the previous year's output – national import requirements increased to an estimated 550 000 tonnes for the 2013/14 marketing year (April/March), about one quarter more than the volume imported in the previous year. As of January 2014, approximately 180 000 tonnes of maize have been imported from South Africa, in contrast to previous years when very limited quantities were sourced from the biggest producer in the subregion. In addition, the country is expected to import 150 000 tonnes from Zambia following a government-to-government agreement finalised in 2013.

Prices of maize increased at the end of 2013

Prices of maize in 2013 were generally stable, but at higher levels than the previous year, reflecting the reduced domestic harvest. The depreciation of the Rand against the US dollar is expected to have helped lessen imported inflationary pressure, given the large consignments of maize from South Africa. In Harare, prices of maize grain increased to USD 0.4 per kg in October and remained unchanged in November, where they were nearly 40 percent above their levels of one year earlier.

Crop calendar Zimbabwe



Zimbabwe

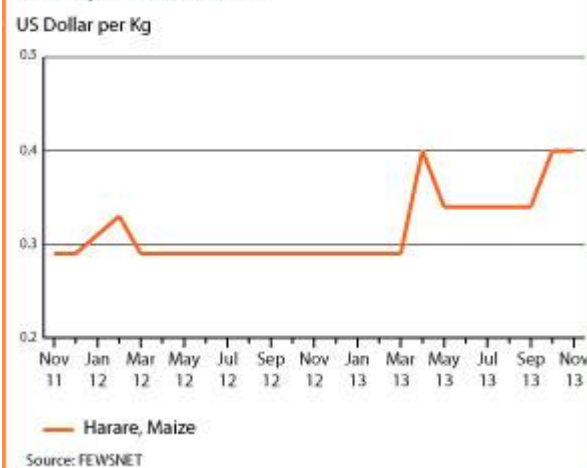
Cereal production

	2008-2012 average	2012	2013 estimate	change 2013/2012
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Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Zimbabwe

Retail prices of maize



Food security deteriorates in first quarter of 2014

The national vulnerability assessment committee (ZimVAC) estimated that 2.2 million persons (25 percent of the rural population) will be food insecure until the start of the main harvest in April, mainly as a result of the lower domestic production in 2013. The current level is a significant increase compared to the 1.67 million persons assessed to be food insecure in the first quarter of 2013, with provinces in the south and west recording the highest rates of food insecurity, reflecting those areas that experienced poor cereal harvests in 2013. Food assistance is currently being provided through the Seasonal Targeted Assistance (STA) programme. However, funding short-falls have been experienced limiting the operations of the programme; half-rations are being distributed to approximately 1 million people. The start of the early harvests in March will assist in improving food security conditions.

Reference Date: 18-November-2013

FOOD SECURITY SNAPSHOT

- Normal to above normal rains forecast for the start of the 2013/14 cropping season
- Maize production lower in 2013 compared to the poor crop in 2012
- Generally stable maize prices in 2013, but higher prices recorded in southern and western markets
- The number of food insecure persons is expected to increase to 2.2 million during the lean period (January-March 2014)

Favourable rains forecast for the start of 2013/14 cropping season

Land preparation and planting is underway for the 2013/14 cropping season (November-June). Preliminary rainfall forecasts point to normal to above normal rains between October and December 2013 across the whole country. In the second half of the rainy season (January-March 2014) there is an increased possibility of below average rains in southern regions. Assistance from both the government and humanitarian community for small-scale and communal farmers will continue this agricultural season, with approximately USD 150 million budgeted for inputs (including seeds and fertilisers) for an estimated 1.6 million farmers. According to the Zimbabwe Seed Traders Association (ZSTA), national maize seed supplies are estimated at about 56 000 tonnes, sufficient to plant an area of 2 million hectares, which is above the short-term average area sown to maize of about 1.6 million hectares.

Tobacco production is expected to increase further in 2014, as more than 83 000 farmers have registered to grow the crop, up from the 78 000 in the previous cropping season, encouraged by the favourable prices.

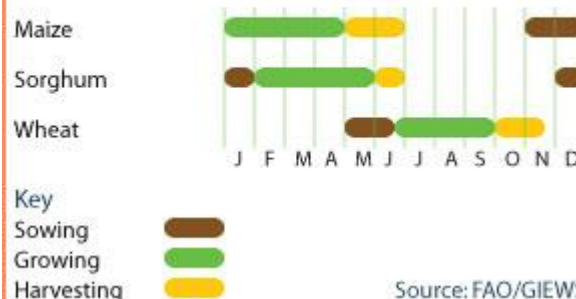
Below average maize production in 2013

Maize production in 2013 is estimated at about 799 000 tonnes, 17 percent and 30 percent lower than in 2012 and the average of the previous five years respectively. Poor rainfall during the main cropping season (November-June) in southern and western provinces, as well as an overall contraction in the area planted, contributed to this year's production decline. By contrast, production of sorghum, estimated at 69 000 tonnes, has increased by 6 percent on last year but was still 34 percent below average. While the winter wheat crop, currently being harvested, is expected at a similar level to last season's output.

Overall, the aggregate cereal harvest in 2013 is estimated at about 1 million tonnes, nearly 150 000 tonnes below 2012's output and about 27 percent below the average of the previous five years.

In contrast to cereal production, the tobacco sector recorded a second year of growth in 2013. An estimated 78 000 tobacco farmers were registered to grow the cash crop, up from 38 000 in 2012. Production is estimated to have reached 164 000 tonnes, compared to the 141 000 tonnes harvested in the previous year. Similarly, sugarcane production in 2013 is estimated above the output of last year, at 4.2 million tonnes.

Crop calendar Zimbabwe



Zimbabwe

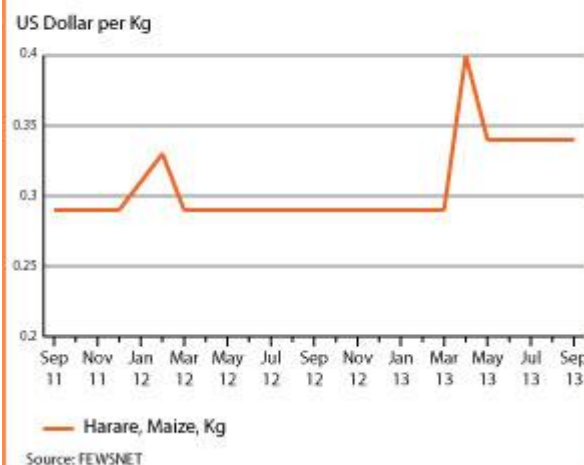
Cereal production

	2008-2012 average	2012	2013 estimate	change 2013/2012
	000 tonnes		percent	
Maize	1,138	968	799	-17
Sorghum	105	65	69	6
Millet	56	44	55	25
Others	78	79	78	-1
Total	1,376	1,156	1,001	-13

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Zimbabwe

Retail prices of maize



Maize imports forecast to increase in 2013/14

The national maize import requirement for the current 2013/14 marketing year (April/March) is estimated in excess of 550 000 tonnes, on account of a decrease in maize production and lower domestic opening stocks. In addition to negotiating to import 150 000 tonnes of maize from Zambia, just over 111 000 tonnes has been imported from South Africa between April and October.

Maize prices stable but high

In Harare, prices of maize grain remained unchanged between May and September. At USD 0.34 per kg, the prevailing price is about 17 percent above their year earlier levels, reflecting an overall reduction in the 2013 harvest, as well as increased transportation costs following a rise in excise duty on both petrol and diesel in March this year. In the southern maize deficit regions, prices have been increasing at a faster rate than in the northern surplus regions.

For the 2013/14 marketing year, the GMB raised its procurement price for maize by 28 percent to USD 379 per tonne.

Deterioration in food security in 2013/14

The results from the 2013 national vulnerability assessment (ZimVAC), released in July, indicate that currently (October-December) about 1.5 million persons in rural areas are food insecure. This number is projected to rise to 2.2 million (25 percent of the rural population) during the peak lean period (January-March 2014), mainly due to the lower domestic harvest. This is a significant increase compared to the 1.67 million persons assessed to be food insecure in the first quarter of 2013.

The provinces of the south and west have the highest rates of food insecurity, reflecting those areas that experienced unfavourable weather conditions and consequently poor cereal harvests in 2013. These provinces have also experienced the highest maize prices in the country. A close monitoring of the situation is warranted.

Reference Date: 07-October-2013

FOOD SECURITY SNAPSHOT

- Normal to above normal rains forecast for the start of the 2013/14 cropping season
- Maize production lower in 2013 compared to the poor crop in 2012
- Generally stable maize prices in 2013, but higher prices recorded in southern and western markets
- An estimated 802 603 persons are reported to be currently food insecure and expected to increase to 2.2 million during the lean period (January-March 2014)

Favourable rains forecast for the start of 2013/14 cropping season

Land preparation is underway for the 2013/14 cropping season (November-June), with planting expected to commence in the following month. Preliminary rainfall forecasts point to normal to above normal rains between October and December 2013 across the whole country. In the second half of the rainy season (January-March 2014) there is an increased possibility of below average rains in southern regions. Assistance from both the government and humanitarian community for small-scale and communal farmers will continue this agricultural season, with approximately USD 150 million budgeted for inputs (including seeds and fertilisers) for an estimated 1.6 million farmers.

Below average maize production in 2013

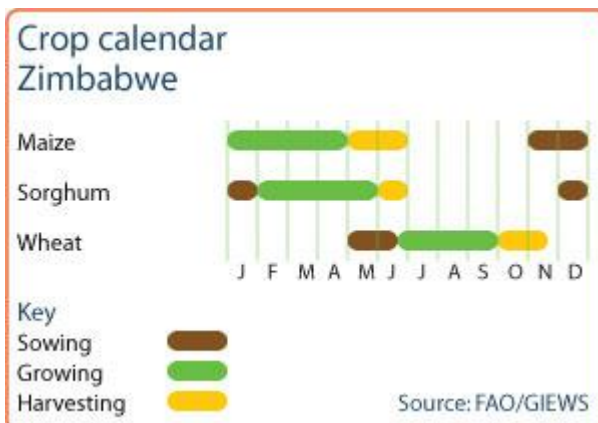
Maize production in 2013 is estimated at about 799 000 tonnes, 17 percent lower than the below-average output in 2012. Poor rainfall during the main cropping season (November-June) in southern and western provinces, as well as an overall contraction in the area planted, contributed to this year's production decline. The lower maize output is also reflected in sluggish grain deliveries to the Grain Marketing Board (GMB) between April and June, which were about 75 percent down on last year's level over the same period. By contrast, production of sorghum, which is generally more tolerant to water deficits, is estimated to have increased slightly by 6 percent to about 69 000 tonnes. While the winter wheat crop, currently being harvested, is expected at a similar level to last season's output.

Overall, the aggregate cereal harvest in 2013 is estimated at about 1 million tonnes, close to 150 000 tonnes below 2012's output and about 27 percent below the average of the previous five years.

In contrast to cereal production, the tobacco sector recorded a second year of growth in 2013. An estimated 78 000 tobacco farmers were registered to grow the cash crop, up from 38 000 in 2012. Production is estimated to have reached 164 000 tonnes, compared to the 141 000 tonnes harvested in the previous year. Similarly, sugarcane production in 2013 is estimated above the output of last year, at 4.2 million tonnes.

Maize imports forecast to increase in 2013/14

The national maize import requirement for the current 2013/14 marketing year (April/March) is estimated in excess of 550 000 tonnes,



Zimbabwe Cereal production

	2008-2012 average	2012	2013 estimate	change 2013/2012
	000 tonnes		percent	
Maize	1,138	968	799	-17
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Millet	56	44	55	25
Others	78	79	78	-1
Total	1,376	1,156	1,001	-13

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



on account of a decrease in maize production and lower domestic opening stocks. Regional supplies, particularly from Zambia, are expected to be tighter in 2013/14 due to an overall contraction in cereal production, and therefore imports are expected to be also sourced from outside the subregion. Zimbabwe had already negotiated to import 150 000 tonnes from Zambia and has acquired import permits for 25 000 tonnes of grain from South Africa.

Maize prices still high despite declines following harvest

In Harare, prices of maize grain, having spiked in April, fell to USD 0.34 per kg in May and remained stable through to August, following the arrival of the new supplies from the 2013 harvest. However, prices are still about 17 percent above their levels of last year in August, reflecting the overall reduced 2013 harvest. For the 2013/14 marketing year, the GMB raised its procurement price for maize by 28 percent to USD 379 per tonne.

The excise duty on fuel, both petrol and diesel, was increased by USD 0.05 in March and has maintained some upward price pressure on maize and other food items. Additionally, the Government has disbursed USD 500 000 to help re-establish the agricultural commodity exchange in 2013.

Deterioration in food security in 2013/14

The results from the 2013 national vulnerability assessment (ZimVAC), released in July, indicate that currently (October-December) about 1.5 million persons in rural areas are food insecure. This number is projected to rise to 2.2 million (25 percent of the rural population) during the peak lean period (January-March 2014), mainly due to the lower domestic harvest. This is a significant increase compared to the 1.67 million persons assessed to be food insecure in the first quarter of 2013.

The provinces of the south and west have the highest rates of food insecurity, reflecting those areas that experienced unfavourable weather conditions and consequently poor cereal harvests in 2013. These provinces have also experienced the highest maize prices in the country. A close monitoring of the situation is warranted.

Reference Date: 02-September-2013

FOOD SECURITY SNAPSHOT

- Maize production lower in 2013 compared to the poor crop in 2012
- Generally stable maize prices in 2013, but higher prices recorded in southern and western markets
- An estimated 802 603 persons are reported to be currently food insecure and expected to increase to 2.2 million during the lean period (January-March 2014)

Below average maize production in 2013

Maize production in 2013 is estimated at about 799 000 tonnes, 17 percent lower than the below-average output in 2012. Poor rainfall during the main cropping season (November-June) in southern and western provinces, as well as an overall contraction in the area planted, contributed to this year's production decline. The lower maize output is also reflected in sluggish grain deliveries to the Grain Marketing Board (GMB) between April and June, which were about 75 percent down on last year's level over the same period. By contrast, production of sorghum, which is generally more tolerant to water deficits, is estimated to have increased slightly by 6 percent to about 69 000 tonnes. While the winter wheat crop, to be harvested in October, is expected at a similar level to last season's output.

Overall, the aggregate cereal harvest in 2013 is estimated at about 1 million tonnes, close to 150 000 tonnes below 2012s output and about 27 percent below the average of the previous five years.

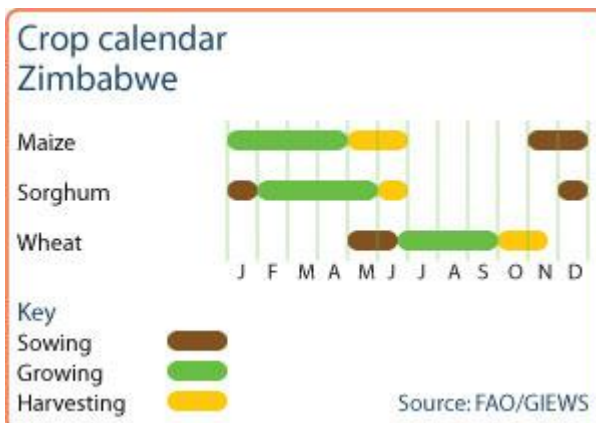
The tobacco sector recorded a second year of growth in 2013. An estimated 70 000 flue-cured tobacco farmers were registered to grow the cash crop by mid-February 2013, up from 38 000 in 2012. Production is estimated to have reached 170 000 tonnes, compared to the 145 000 tonnes harvested in the previous year.

Maize imports forecast to increase in 2013/14

The national maize import requirement for the current 2013/14 marketing year (April/March) is estimated in excess of 550 000 tonnes, on account of decrease in maize production and lower domestic opening stocks. Regional supplies, particularly from Zambia, are expected to be tighter in 2013/14 due to an overall contraction in cereal production, and therefore imports are expected to be also sourced from outside the subregion. Zimbabwe had already negotiated to import 150 000 tonnes from Zambia and has acquired import permits for 25 000 tonnes of grain from South Africa. A draw-down in stocks will also contribute to covering the larger national deficit in 2013/14.

Maize prices declined following the start of the main harvest in May

In Harare, prices of maize grain, having spiked in April, fell to USD 0.34 per kg in May following the arrival of the new supplies from the 2013 harvest. However, prices are still about 17 percent above their levels of last year in June. For the 2013/14 marketing year, the GMB raised its procurement price for maize by 28 percent to USD 379 per



Zimbabwe Cereal production

	2008-2012 average	2012	2013 estimate	change 2013/2012
	000 tonnes		percent	
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tonne.

The excise duty on fuel, both petrol and diesel, was increased by USD 0.05 in March and has maintained some upward price pressure on maize and other food items. Additionally, the Government has disbursed USD 500 000 to help re-establish the agricultural commodity exchange in 2013.

Deterioration in food security in 2013/14

The results from the 2013 national vulnerability assessment (ZimVAC), released in July, indicate that currently (July-September) 802 603 persons in rural areas are food insecure. This number is projected to rise to 2.2 million (25 percent of the rural population) during the peak lean period (January-March 2014), mainly due to the lower domestic harvest. This is a significant increase compared to the 1.67 million persons assessed to be food insecure in the first quarter of 2013.

The provinces of the south and west have the highest rates of food insecurity, reflecting those areas that experienced unfavourable weather conditions and consequently poor cereal harvests in 2013. These provinces have also experienced the highest maize prices in the country. A close monitoring of the situation is warranted.

Reference Date: 17-October-2012

FOOD SECURITY SNAPSHOT

- Planting of the 2012/13 season's crops is about to begin with favourable rainfall forecasts for northern regions
- Decline in 2012 cereal harvest following protracted dry spell and reduced plantings
- Maize prices are high in southern deficit producing areas but are stable at relatively lower levels in Harare
- An estimated 1.2 million people are currently food insecure with projections indicating a rise to 1.67 for the period January-March 2013

Mixed rains forecast for 2012/13 cropping season

Land preparations are underway and planting activities are expected to begin in November, when the first seasonal rains are forecast to start. However, reports indicate that access to inputs may be restricted this season due to financial constraints.

The rainfall forecast for the main October-March rainy season points to favourable weather conditions in northern parts of the country, which normally produce the bulk of the domestic grain output. However, below normal precipitation is forecast for the low producing southern regions.

Livestock conditions deteriorate

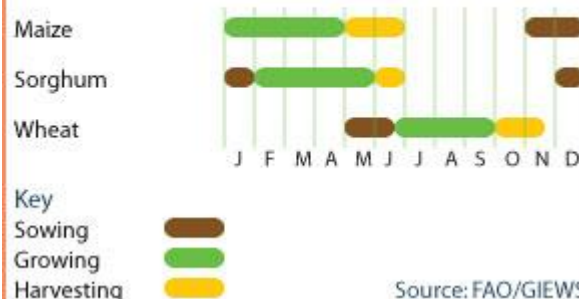
Poor water availability and precipitation in southern provinces have led to deterioration in livestock conditions. An estimated 1.33 million cattle have been affected by the dry conditions and lack of adequate pasture. Measures are being put in place to help alleviate the situation, including the distribution of stock feed and veterinary medicines.

Lower 2012 harvest, but stocks and imports help bridge national deficit

The maize output from the 2011/12 cropping season registered a sharp 33 percent decline compared with the previous season, estimated at 968 000 tonnes. Millet and sorghum production also decreased to below 2011 levels, while declines were also recorded for groundnuts, soy beans, sunflower and sugar beans. Overall, cereal production in 2012 is put at 1.13 million tonnes, nearly one third less than last year's good output. This figure also includes the winter wheat crop, estimated to be below 2011's output. Production of wheat continues to be constrained by lack of access to inputs and an unstable power supply.

The 2012 domestic cereal harvest is estimated to satisfy approximately 55 percent of total national requirements for the current 2012/13 marketing year (April/May). Although imports of cereals are set to increase, sizeable carry-over stocks from last year's good harvests has enabled the country to partially meet the national deficit through its reserves. A more conducive economic environment has led to improvements in private sector operations, and commercial imports are therefore anticipated to fill a large proportion of the deficit under the current conditions.

Crop calendar Zimbabwe



Zimbabwe

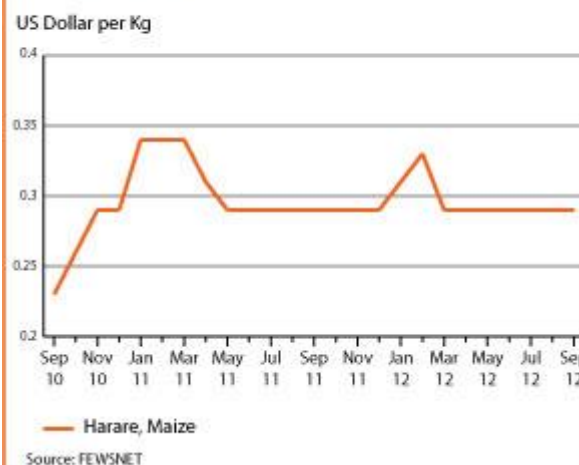
Cereal production

	2007-2011	2011	2012	change
	average		estimate	2012/2011
	000 tonnes			percent
Maize	1,135	1,452	968	-33
Sorghum	107	95	65	-32
Wheat	56	23	20	-13
Others	100	97	80	-18
Total	1,398	1,667	1,133	-32

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Zimbabwe

Retail prices of maize



Higher prices recorded in southern markets

Prices of maize grain in Harare declined from their seasonal peak of USD 0.33 per kg in March 2012 and have since stabilised through to September at USD 0.29 per kg. Prices in the south, which experienced production short-falls in 2012, are generally at higher levels, and in Gwanda, Matabeleland South, prices were nearly twice as high as Harare. Higher fuel costs are also putting upward pressure on grain prices in deficit producing regions.

An estimated 1.2 million persons are currently food insecure

The sharp drop in cereal production and poor livestock conditions have led to the deterioration of the food security situation. The findings from the national vulnerability assessment (ZimVAC) indicate that an estimated 1.2 million persons in rural areas are food insecure. This number is projected to increase during the peak of the lean season, between January and March 2013, to approximately 1.67 million people, 19 percent of the rural population. The southern provinces of Masvingo and Matabeleland South are estimated to have the highest rates of food insecurity, and higher maize prices recorded in these areas therefore represents a serious concern. In northern parts of the country, which fared better in the 2011/12 cropping season, production is estimated to be adequate to cover longer periods than those in the south and food security conditions are comparatively more stable.

Reference Date: 30-July-2012

FOOD SECURITY SNAPSHOT

- Drop in cereal production for 2011/12 cropping season following protracted dry spell in 2012
- Seasonable increase in maize prices during first quarter of 2012, but prices decline and stabilise between March to June
- The 2012 vulnerability assessment (ZimVAC) estimates that 1.67 million people will be food insecure during the forthcoming lean season (January-March 2013)

Sharp drop in maize production in the 2011/12 cropping season

Harvesting of main 2011/12 maize crop was completed in June 2012. Production forecasts, based on a Government assessment conducted in April, indicate a sharp drop in production compared with the previous season, on account of prolonged dry spell. At 968 000 tonnes, the estimated maize output in 2012 is about 33 percent below last year's level and marks a reversal of the increasing trend since 2009. An estimated 722 557 hectares of maize were written off as result of moisture deficits, while delayed and erratic rainfall at the start of the 2011/12 rainy season (October-March) had already resulted in the contraction of maize plantings by about 20 percent compared with the previous season's 2.1 million hectares. Similarly, millet and sorghum production are estimated at below 2011 levels, following reduced plantings and lower yields. Other major crops – groundnuts, soy beans, sunflower and sugar beans – also registered a decrease in production in the 2011/12 cropping season.

Overall, cereal production in 2012 is put at 1.13 million tonnes, nearly one third less than last year's good output. This estimate also includes a forecast for the winter wheat crop, to be harvested from October. Despite early indications of favourable 2012 wheat output, the continuing difficulties facing wheat farmers, most notably an erratic and insufficient power supply, as well as constrained availability of financial credit, deterred an expansion in the planted area to wheat. As a result, wheat production is forecast at a lower level than last year.

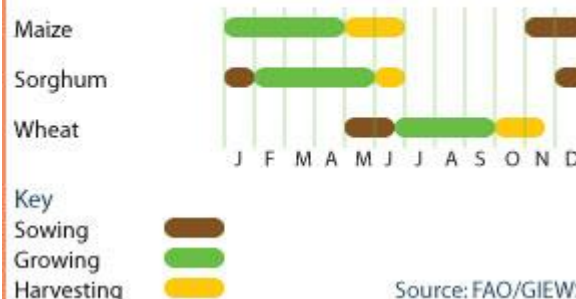
Deterioration in pasture conditions

The prolonged dry period in 2012 also negatively impacted on pasture in southern provinces. This has limited the availability of grazing land and recent reports indicate that farmers are now moving their livestock in search of pasture, which is expected to intensify demand and strain resources in these areas.

Import requirements estimated to rise in 2012/13; carryover stocks will still help bridge some of the supply gap

National cereal production is estimated to satisfy approximately 55 percent of total domestic requirements for the current 2012/13 marketing year (April/May). Although imports of cereals are set to increase, sizeable carry-over stocks from last year's good harvests (the Grain Marketing Board is estimated to hold approximately 311 000 tonnes of maize) will enable the country to partially meet the national

Crop calendar Zimbabwe



Zimbabwe

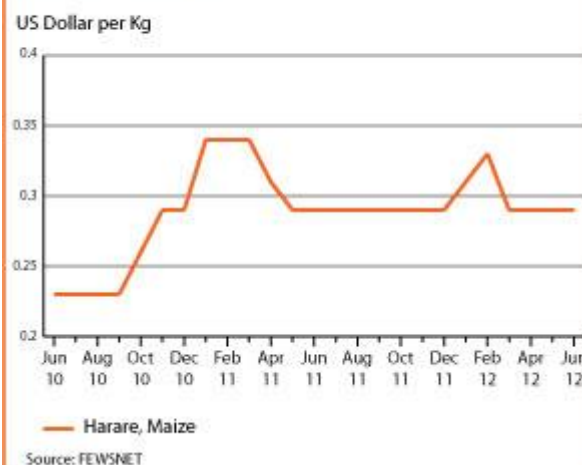
Cereal production

	2007-2011 average	2011	2012 forecast	change 2012/2011
	000 tonnes		percent	
Maize	1 135	1 452	968	-33
Sorghum	107	95	65	-32
Wheat	56	23	20	-13
Others	100	97	80	-18
Total	1 398	1 667	1 133	-32

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Zimbabwe

Retail prices of maize



deficit through its reserves. A more conducive economic environment has led to improvements in private sector operations, and commercial imports are therefore anticipated to fill a large proportion of the deficit under the current conditions.

Seasonable rise in maize prices

Maize grain prices in Harare, which remained stable between May and December 2011 at USD 0.29 per kg, began to seasonably increase in January, rising to USD 0.33 in February. In March, new supplies from the 2012 harvest lowered prices back to USD 0.29, where they remained unchanged through to June. Elsewhere in the country maize grain prices followed similar movements. However, in southern provinces, market prices remained at high levels or increased, reflecting poor production levels in these locations.

Lower production leads to an increase in number of food insecure

The recently released 2012 national vulnerability assessment (ZimVAC) report indicates that 19 percent of the rural population, around 1.67 million people, are projected to be food insecure during the peak lean period, between January and March 2013. This marks an increase over last year's level of approximately 1 million people. Southern areas were particularly affected by the dry spell and subsequent production short-falls. Consequently the southern provinces of Masvingo and Matabeleland South are estimated to have the highest rates of food insecurity. It is likely that households in these areas will deplete their stocks earlier than normal, necessitating increased market purchases. To compound the current situation - low food stocks and comparatively high prices - average incomes (April 2012) in Masvingo and Matabeleland were estimated to be the lowest in the country, further contributing to constraining food access. In northern parts of the country, which fared better in the 2011/12 cropping season, production is estimated to be adequate to cover longer periods than those in the south and food security conditions are comparatively more stable.

Reference Date: 26-June-2012

FOOD SECURITY SNAPSHOT

- Drop in cereal production for 2011/12 cropping season following protracted dry spell in 2012
- Seasonable increase in maize prices during first quarter of 2012
- Concern over deteriorating food security conditions in southern provinces grows following production short-falls

Sharp drop in maize production in the 2011/12 cropping season

Harvesting of main 2011/12 maize crop is being concluded in June 2012. Production forecasts, from a Government assessment in April, indicate a sharp drop in production compared with the previous season, on account of prolonged dry spell. At 968 000 tonnes, the estimated maize output in 2012 is about 33 percent below last year's level and marks a reversal of the increasing trend since 2009. An estimated 722 557 hectares of maize were written off as result of moisture deficits, while delayed and erratic at the start of the 2011/12 rainy season (October-March) had already resulted in the contraction of maize plantings by about 20 percent compared with the previous season's 2.1 million hectares. Similarly, millet and sorghum production are estimated to be below the levels of 2011, following reduced plantings and lower yields. Other major crops – groundnuts, soy beans, sunflower and sugar beans – also registered a decrease in production in the 2011/12 cropping season.

Overall, cereal production in 2012 is put at 1.13 million tonnes, nearly one third less than last year's good output. This estimate also includes a forecast for the winter wheat crop, to be harvested from October. Despite early indications of favourable 2012 wheat output, the continuing difficulties facing wheat farmers, most notably an erratic and insufficient power supply, deterred an expansion in the planted area to wheat. As a result, wheat production is forecast at a significantly lower level than last year.

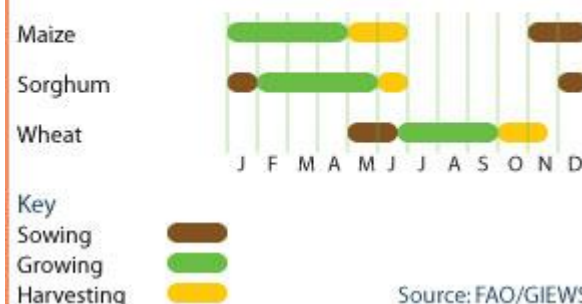
Deterioration in pasture conditions

The prolonged dry period in 2012 also negatively impacted on pasture in southern provinces. This has limited the availability of grazing land and recent reports indicate that farmers are now moving their livestock in search of pasture, which is expected to intensify demand and strain resources in these areas.

Import requirements estimated to rise in 2012/13; carryover stocks will still help bridge some of the supply gap

National cereal production is estimated to satisfy approximately 55 percent of total domestic requirements for the current 2012/13 marketing year (April/May). Although imports of cereals are set to increase, sizeable carry-over stocks from last year's good harvests (the Grain Marketing Board is estimated to hold approximately 311 000 tonnes of maize) will enable the country to partially meet the national deficit through its reserves. A more conducive economic environment has led to improvements in private sector operations, and commercial

Crop calendar Zimbabwe



Zimbabwe

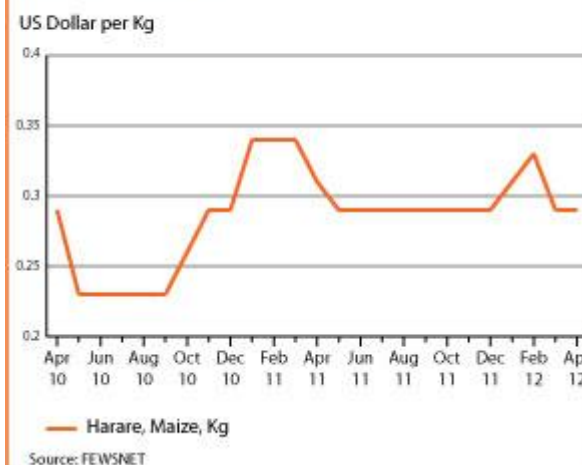
Cereal production

	2007-2011 average	2011	2012 forecast	change 2012/2011
	000 tonnes		percent	
Maize	1 135	1 452	968	-33
Sorghum	107	95	65	-32
Wheat	59	41	12	-71
Others	100	97	80	-18
Total	1 401	1 685	1 125	-33

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Zimbabwe

Retail prices of maize



imports are therefore anticipated to fill a large proportion of the deficit under the current conditions.

Seasonable rise in maize prices

Maize grain prices in Harare, which remained stable between May and December 2011 at USD 0.29 per kg, began to seasonably increase in January, rising to USD 0.33 in February. In March, new supplies from the 2012 harvest lowered prices to USD 0.29, and remained unchanged in April. Elsewhere in the country maize grain prices followed similar movements. However, in southern provinces, market prices remained at high levels or increased, reflecting poor production levels in these locations.

Southern areas affected by dry spell remain a concern

Areas affected by the dry spell and subsequent production short-falls, particularly in southern parts of Manicaland, Matabeleland South and Masvingo provinces, remain a serious concern, despite generally stable food security conditions across the country. It is likely that households in these areas will deplete their stocks earlier than normal, necessitating increased market purchases. On average, households' supplies from own production are estimated to be sufficient to cover about four months of consumption requirements. However, in northern parts of the country, which fared better in the 2011/12 cropping season, production will be adequate to cover longer periods. In Gokwe South for instance (northern part of Midlands province), cereal harvests are estimated to be sufficient for seven months. Furthermore, improved cash crop production and higher prices for tobacco may also help raise income levels for some households and increase labour opportunities.

The findings of the 2012 national vulnerability assessment (ZimVAC), to be released in July, are expected to provide clearer indications on current and projected food security conditions as well as possible food aid requirements.

Reference Date: 26-April-2012

FOOD SECURITY SNAPSHOT

- Drop in cereal production for 2011/12 cropping season following protracted dry spell in 2012
- Seasonable increase in maize prices during first quarter of 2012
- Concern over deteriorating food security conditions in southern provinces grows following production short-falls

Sharp drop in maize production in the 2011/12 cropping season

Harvesting of main 2011/12 maize crop commenced in March, and is expected to continue until June. Recently released production estimates, from a Government assessment in April, indicates a sharp drop in production compared with the previous season, on account of prolonged dry spell. At 968 000 tonnes, the estimated maize output in 2012 is about 33 percent below last year's level and marks a reversal of the increasing trend since 2009. A persistent period of below average rains since the start of 2012 caused widespread wilting of the maize crop, particularly impacting the southern provinces that are more prone to dry weather conditions. An estimated 722 557 hectares of maize were written off as result of moisture deficits, while delayed and erratic at the start of the 2011/12 rainy season (October-March) had already resulted in the contraction of maize plantings by about 20 percent compared with the previous season's 2.1 million hectares. Similarly, millet and sorghum production are estimated to be below the levels of 2011, on account of reduced plantings and lower yields. Other major crops – groundnuts, soy beans, sunflower and sugar beans – also registered a decrease in production in the 2011/12 cropping season.

Overall, cereal production in 2012 is put at 1.17 million tonnes, nearly one third less than last year's good output. This estimate also includes a forecast increase in the winter wheat crop – to be planted in May – following the government's decision to provide low-interest loans, to help facilitate greater investment in wheat production. Higher yields for tobacco and a larger planted area to cotton contributed to a marginal increase in production of about 2 percent.

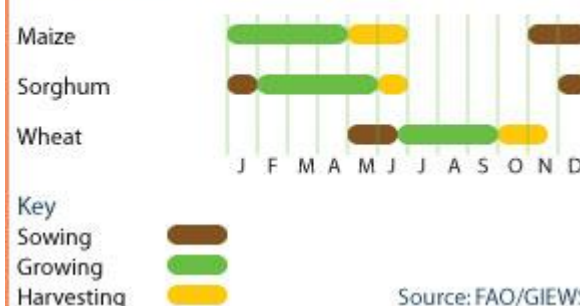
Import requirements estimated to rise, while carryover stocks will help to bridge some of the supply gap in 2012/13

National cereal production is estimated to satisfy approximately 55 percent of total domestic requirements for the just started 2012/13 marketing year (April/May). Although imports of cereals are set to increase, sizeable carry-over stocks from last year's good harvests (the Grain Marketing Board is estimated to hold approximately 311 000 tonnes of maize) will enable the country to partially meet the national deficit through its reserves. A more conducive economic environment has led to improvements in private sector operations, and commercial imports are therefore anticipated to fill a large proportion of the deficit under the current conditions.

Seasonable rise in maize prices

Maize grain prices in Harare, which remained stable between May and

Crop calendar Zimbabwe



Zimbabwe

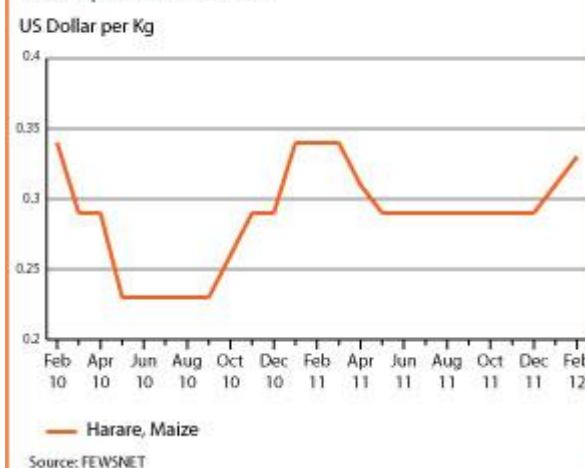
Cereal production

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Sorghum	107	95	65	-32
Wheat	59	41	60	46
Others	100	97	80	-18
Total	1 401	1 685	1 173	-30

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Zimbabwe

Retail prices of maize



December 2011 at USD 0.29 per kg, began to seasonably increase in January, rising to USD 0.33 in February. Further increases occurred in March across the country to levels above that of the previous year, but indications point to a stabilisation of prices in April. The smaller 2012 harvest, however, may contribute to maintaining higher prices compared to 2011, particularly in southern markets.

Southern areas affected by dry spell remain a concern

Areas affected by the dry spell and subsequent production short-falls, particularly in southern parts of Manicaland, Matabeleland South and Masvingo provinces, remain a serious concern, despite generally stable food security conditions across the country. It is likely that households in these areas will deplete their stocks earlier than normal, necessitating increased market purchases. However, new supplies from the 2011/12 harvest will enable households to replenish stocks, while improved cash crop production and higher prices for tobacco may also help to raise income levels for some households and increase labour opportunities. However, low-income households, with limited or no agricultural production capacity, may face continued constraints to access food following the slight increase in maize prices. The findings of the 2012 national vulnerability assessment (ZimVAC), to be released soon is expected to provide clearer indications on current and projected food security conditions as well as possible food aid requirements.

Reference Date: 13-March-2012

FOOD SECURITY SNAPSHOT

- Erratic rains and a protracted dry spell negatively affected crops in southern provinces
- Seasonable increase observed in maize prices
- The food security situation remains generally stable

Unfavourable prospects for the 2011/12 maize crop

Delayed and erratic start to the 2011/12 rainy season (October-March) resulted in a contraction of maize plantings by about 20 percent compared with the previous season's 2.1 million hectares. The reduced plantings were most notable in the communal farming sector, where many farmers were forced to replant following a cessation of rains during the planting period in parts of Mashonaland provinces and Manicaland. Uneven precipitation throughout much of the season also resulted in below average cumulative rainfall (October 2011 to February 2012). The consequent moisture deficits, particularly in Masvingo and Matabeleland South, has caused permanent crop wilting, with an estimated 500 000 hectares of maize likely to have very low yields or none at all. Water satisfaction indexes for maize, confirm poor conditions in the southern provinces. However, in the northern large producing Mashonaland provinces, more stable rains have been received and crop conditions are generally satisfactory. Preliminary indications point to a crop of between 900 000 to one million tonnes, if current conditions persist. At this level, production would be near the five-year average, but nearly one third less than the good harvest of 2011.

Maize prices increase marginally, following stable period in 2011

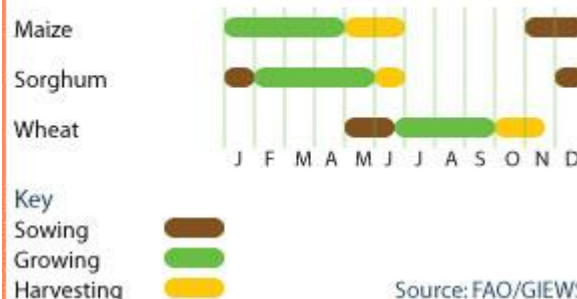
Maize prices in Harare remained stable between May and December 2011 at 0.29 USD per kg, but rose marginally in January to USD 0.31, in-line with normal seasonal patterns. The imposition of a 25 percent import surcharge on a variety of food products will put pressure on import inflation. However, the appreciation of US dollar against the South African Rand (Zimbabwe's main trading partner) over the last 12 months will help to partly offset the impact of the import tax.

Domestic maize utilization is forecast at about 1.7 million tonnes for the 2012/13 marketing year (April/May). Given the production forecast, the country could therefore face a deficit of approximately 700 000 tonnes. However, sizeable maize stocks are estimated to be available in the country, which would assist in bridging the potential supply gap next year. Furthermore, a more conducive economic environment has led to improvements in private sector operations, enabling larger quantities of food imports and facilitating improved distribution within the country. The suspension of maize exports from Malawi, however, has limited the import opportunities from within the subregion.

Generally satisfactory food security conditions

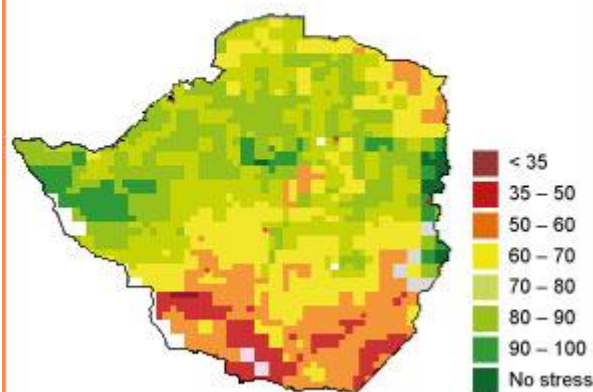
The start of the green harvest, normally from February, will help to augment household stocks until supplies from the main harvest arrive from April/May. However, harvesting activities are set to be slightly

Crop calendar Zimbabwe



Zimbabwe

Maize crop water satisfaction index (WRSI)
 February 3rd dekad 2012



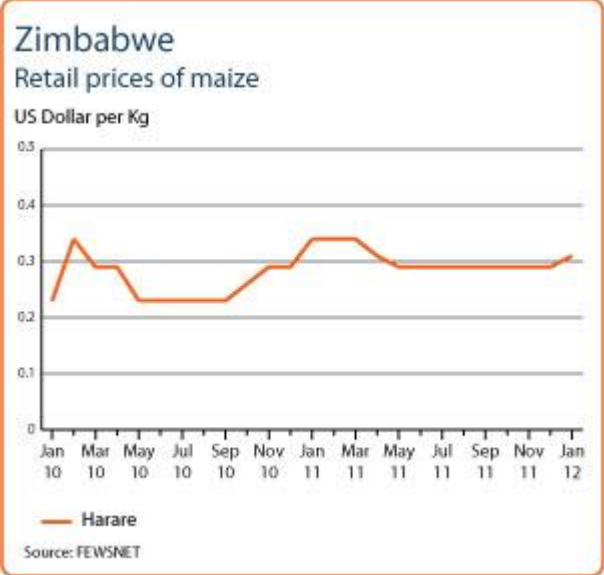
Zimbabwe

Cereal production

	2006-2010 average	2010	2011 estimate	change 2011/2010
	000 tonnes			percent
Maize	1 141	1 354	1 452	7
Sorghum	108	132	95	-28
Wheat	100	42	45	7
Others	105	103	97	-6
Total	1 454	1 631	1 689	4

Note: percentage change calculated from unrounded data.
 Source: FAO/GIEWS Country Cereal Balance Sheets

delayed following the late start of seasonal rains in 2011, which will prolong the current lean season (January to March). According to the results from the 2011 national vulnerability assessment (ZimVAC), one million rural persons are estimated to be food insecure. Although this represents 12 percent of the population, it is approximately 20 percent below the levels of the previous year. Relatively stable prices and adequate food supplies have combined to improve and stabilise the food security situation in 2011. However, the expected drop in maize production will have a negative bearing on current conditions, particularly in Masvingo and Matabeleland provinces where the rate of food insecurity are the highest in the country. These provinces are also expected to suffer from poor production levels in 2012. Food assistance is currently being delivered to the affected population.



Reference Date: 09-January-2012

FOOD SECURITY SNAPSHOT

- Most of the country received adequate rains during the last quarter of 2011 coinciding with the beginning of the 2011/12 agricultural campaign; exceptions were some areas in the north east
- Slightly higher maize prices were observed, but levels remained steady during most of 2011
- Overall food security conditions remain stable

Favourable rains over most of the country at the start of the 2011/12 cropping season

The start of the current 2011/12 rainy season (October-March) was generally favourable. Parts of Mashonaland Central and West however, received below average rains leading to some localised early season deficits. Planting is virtually complete, with the bulk of the planting normally occurring during November and early December. Above normal rains are forecast from January to March 2012.

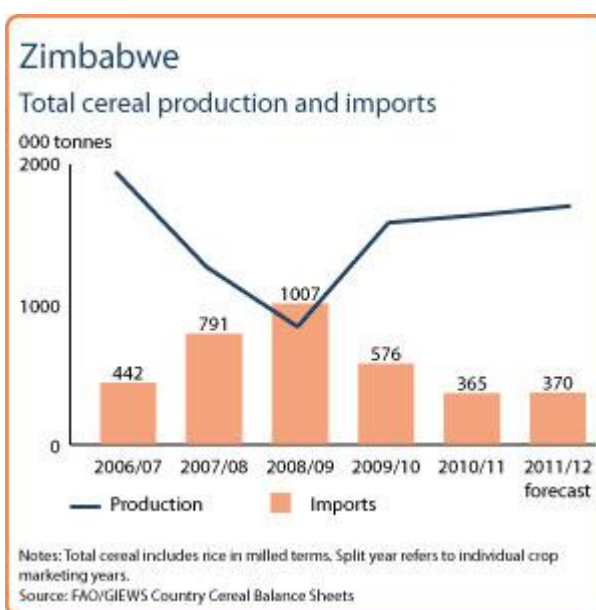
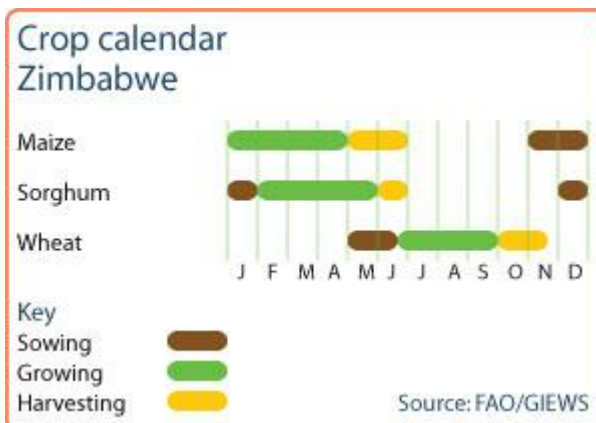
Improvement in the agriculture sector, reflected in improved availability of agricultural inputs, has been observed. National maize seed supplies were estimated at over 80 000 tonnes, about 25 000 tonnes in excess of the country's requirement, leading to the lifting of the seed export ban. In total, more than 488 000 households have been targeted for support through government and donor programmes and an additional 300 000 will receive training. Although the number of beneficiaries is below last year, input packages are larger for the current 2011/12 agricultural campaign in an effort to facilitate an expansion in households' production above the level of subsistence. Despite the more than adequate supplies, higher fertiliser prices may restrict farmers' access to inputs outside the humanitarian and government support programmes.

Increased cropped area supported larger maize harvest in 2010/11

National maize production in 2010/11, estimated at approximately 1.45 million tonnes, is about 7 percent above the 2010 output, marking a third consecutive annual increase. The crops benefited from generally adequate rains during the 2010/11 agricultural season, except a dry spell in February that negatively impacted productivity in southern provinces of Masvingo and Matabeleland South, as well as some southern parts of Manicaland and Midlands. Overall, national cereal output is estimated at 1.7 million tonnes, 4 percent higher than last season's output.

Stable, but slightly higher maize prices

Maize prices in Harare have remained stable between May and November, at 0.29 USD per kg. Inflation has also increased in 2011 following higher food prices and increasing housing and rental costs. The appreciation of the USD against the Rand (Zimbabwe's main trading partner) however, may contribute to easing imported inflation and consequently partly alleviate domestic inflationary pressure.



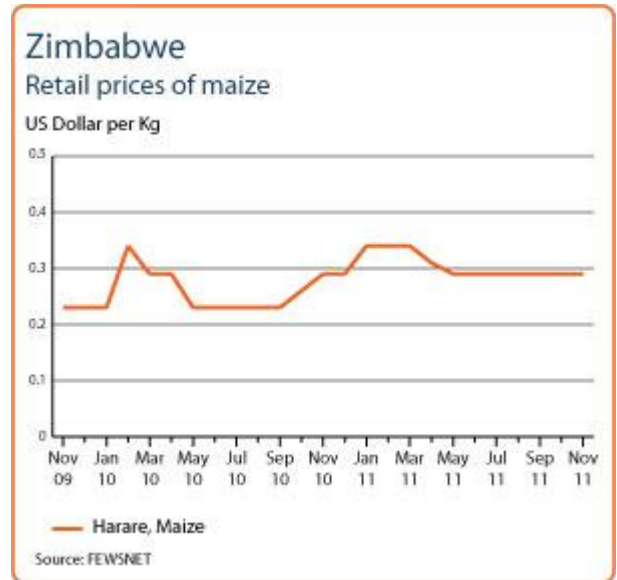
Zimbabwe Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes			percent
Maize	1 141	1 354	1 452	7
Sorghum	108	132	95	-28
Wheat	100	42	45	7
Others	106	111	110	-1
Total	1 455	1 639	1 702	4

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Generally satisfactory food security conditions

Current food security conditions are generally stable across most of the country. However, the increased cost of living as well as the slightly elevated maize prices will contribute to aggravate food security conditions for low income households, particularly as households now shift to market purchases to satisfy their food requirements during the peak lean period (January-February). The national vulnerability assessment (ZimVAC), estimates that 12 percent of the rural population will be food insecure during the peak lean period, marking an improvement compared to the 15 percent estimated at the same time the previous year.



Reference Date: 09-August-2011

FOOD SECURITY SNAPSHOT

- Maize production increased in 2011 but the sorghum and millet crops were lower than last year
- Price of maize remained steady in the capital, but at a slightly higher level than last year
- Food security remains generally stable, but localised production declines could affect areas in the south that experienced a dry-spell in early 2011

Increased cropped area leads to larger maize harvest

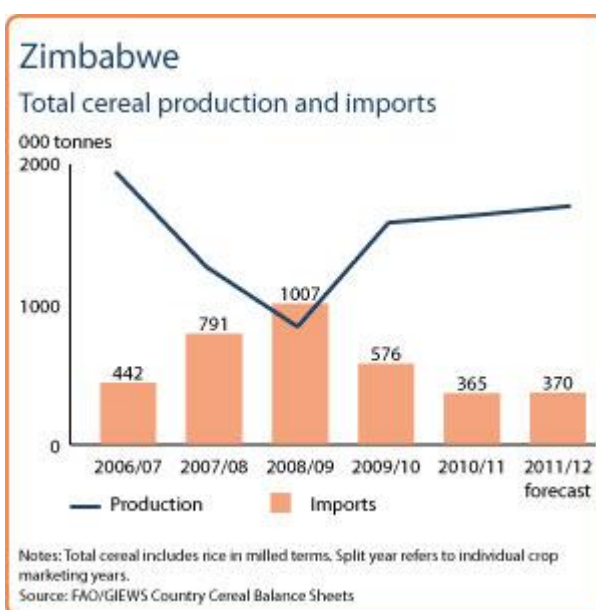
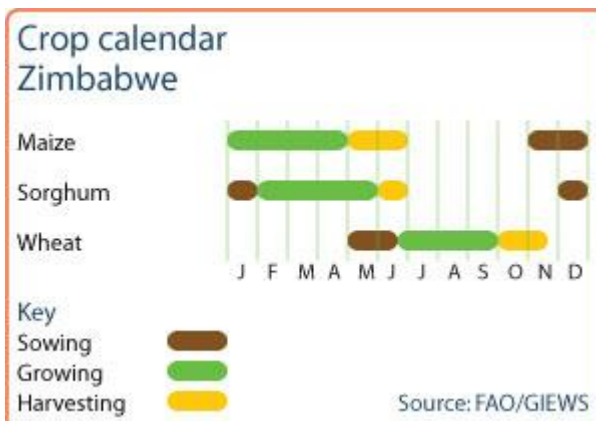
National production estimates, from the second round crop assessment, point to a larger maize harvest in 2011. At approximately 1.45 million tonnes, the crop is about 7 percent above the 2010 output, the third consecutive annual increase. Rainfall performance was generally favourable throughout most of the 2010/11 agricultural season. However, during February 2011 a dry spell negatively impacted crop development in southern provinces of Masvingo and Matabeleland South, as well as some southern parts of Manicaland and Midlands, particularly affecting the late planted crop. This is reflected in low yield estimates. Higher yield rates were recorded in northern Mashonaland provinces. Overall, with national average yields almost similar to last year, production gains on last year are primarily attributed to an expansion in the area planted. In addition, similar to last season, improved availability of inputs has maintained yield levels. In total an estimated 1.5 million households benefited from input assistance for the 2010/11 season, accessing inputs at a subsidized rate through Government and the humanitarian community assistance programmes.

The sorghum and millet production are estimated to be below last year's level, on account of a smaller area planted. The winter wheat crop is scheduled to be harvested from the beginning of October. Estimates indicate a larger planted area compared to last season, at about 14 000 hectares, and favourable crop conditions as of July. Intermittent power interruptions, however, continue to disrupt irrigations cycles, impeding the country's productive capacity.

Overall, national cereal output is estimated at 1.7 million tonnes for 2011, about 4 percent higher than last season's output.

Maize prices decline, but remain slightly higher than last year

Reflecting improved supplies following the harvest, maize prices began to decline in April 2011 in Harare, slightly later than normal seasonal patterns. At 0.29 USD per kg in June 2011, prices are also higher than last year's level of 0.23 USD. The national average price of maize, based on markets monitored by the Agriculture and Food Security Monitoring System (AFSMS), is also at a higher level relative to June 2010. At the regional level, price variations reflect production disparities across the country; lower prices were recorded in northern markets of Gokwe (Midlands) and Hurungwe (Mashonaland West), while comparatively higher levels were observed in the southern markets of



Zimbabwe Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes			percent
Maize	1 141	1 354	1 452	7
Sorghum	108	132	95	-28
Wheat	100	42	45	7
Others	165	195	157	-19
Total	1 455	1 639	1 702	4

Note: percentage change calculated from unrounded data.
 Source: FAO/GIEWS Country Cereal Balance Sheets

Chiredzi and Bikita (Masvingo).

The re-imposition of import duties on maize meal and cooking oil from the beginning of August – a measure aimed at increasing domestic productive capacity in the milling industry – could exert upward pressure on prices, but it is too early to gauge the impact of this policy. While the launch of the Agriculture Commodity Exchange, expected early next year, is anticipated to facilitate improved trade in commodities. The national parastatal, the Grain Marketing Board (GMB), increased its procurement price to USD 285 per tonne and has procured larger quantities of maize during the current 2011/12 marketing year (April/March), estimated at 70 000 tonnes, up by 50 percent from last year.

Given the improved maize production, national imports requirements are estimated to be lower than the previous season, forecast at about 170 000 tonnes for the 2011/12 (April/March) marketing year, compared to 233 000 tonnes imported last year.

Overall improved food security situation, but households in deficit producing areas likely to face heightened food insecurity in the coming months

Food security conditions remain satisfactory and stable across most of the country, owing to improved maize availability. However, based on sites monitored by the National Early Warning Unit (NEWU), consumption of own grain production in June 2011 is below levels compared to the same month in 2010, which, in part, reflects a drop in production of both sorghum and millet. In some southern regions that experienced low agricultural productivity, as a result of agro-climatic shocks, households' capacity to replenish food stocks may be hindered, and therefore higher prices are expected to aggravate food security conditions as households' shift to market purchases to satisfy their food requirements as the lean season approaches.

Results from the national vulnerability assessment (ZimVAC), which will provide further details on the national food security situation, have not yet been released. However, an urban assessment conducted by ZimVAC indicates a marked improvement in food security over the last three years. An estimated 13 percent of the urban population are categorised as food insecure in 2011, compared with 24 percent in 2009, with about 90 percent of households sampled accessing acceptable diets.



Reference Date: 24-May-2011

FOOD SECURITY SNAPSHOT

- Increase in maize plantings support production growth for the 2010/11 maize crop
- Prices of maize increase seasonally, but remained steady during the first quarter of 2011 in the capital
- Food security remains generally stable, but localised production declines could affect areas in the south that experienced a dry-spell in early 2011

Increased maize plantings support production growth

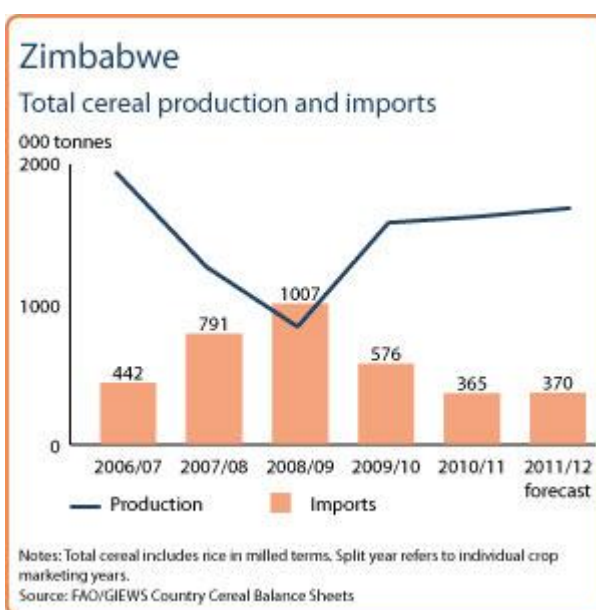
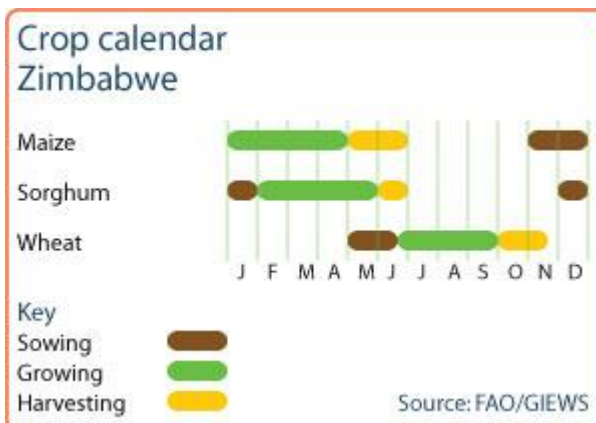
Harvesting of the 2010/11 cereal crops is currently underway. The Government second round crop assessment indicates a large expansion in maize plantings estimated at about 2.1 million hectares, marking a 16 percent increase compared with the previous season's area. By contrast, the planted area of millet and sorghum fell by about 6 and 21 percent respectively. Rainfall patterns from October to January were generally favourable, supporting crop development, but was punctured by a period of heavy rains affecting low lying parts of Midlands, Mashonaland Central and both north and south Matabeleland provinces. This was followed by a dry-spell last February that mostly affected the low producing southern areas, particularly the late planted crops. Nationally about 88 percent of the maize crop was planted by December 2010. During March and April, rains improved in northern regions, but water deficits continued in some southern and central areas, affecting maize production in Matabeleland South and parts of Midlands. The national production estimates point to a larger maize harvest of 1.45 million tonnes, about 7 percent above the 2010 output. However, both sorghum and millet production are estimated to be below last year's level. The area planted with tobacco grew by nearly 50 percent compared with the previous season, supporting an improvement in production. By contrast, cotton production is estimated to have fallen, on account of insufficient rains that lowered yields.

As in the previous year, farmers received support from the Government and the humanitarian community in the form of seed and fertilizer inputs distributed either directly or through a closed voucher scheme. In total an estimated 1.5 million households benefited from input assistance for the 2010/11 season.

Maize grain prices increase seasonally, but level off at the beginning of 2011

In Harare, maize prices, which increased seasonally during the last quarter of 2010, remained steady in the first three months of 2011 and in March 2011 were about 17 percent higher than levels of last year. However, the national average price of maize in April 2011, based on the markets monitored by the Agriculture and Food Security Monitoring System (AFSMS), was at a similar level compared to the same month one year earlier.

Imports of maize continued as normal in the 2010/11 marketing year (April/March), and current estimates put the level of imports at about



Zimbabwe Cereal production

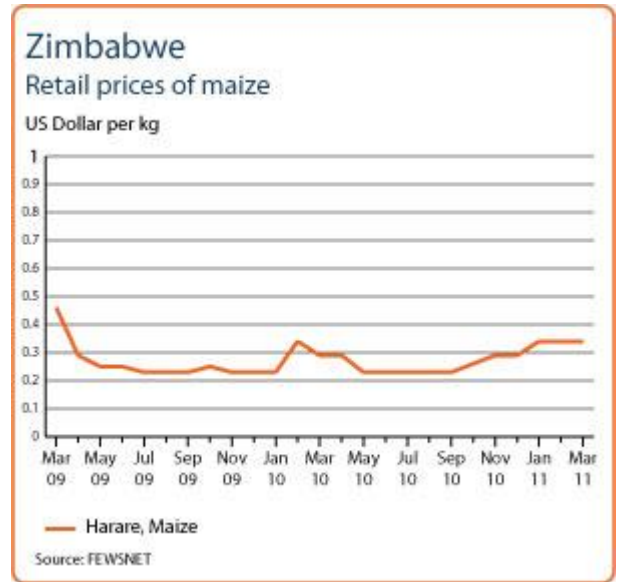
	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes			percent
Maize	1 141	1 354	1 452	7
Sorghum	108	132	95	-28
Wheat	97	30	30	0
Others	165	195	157	-19
Total	1 453	1 627	1 687	4

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

233 000 tonnes, including informal cross border trade. For the current 2011/12 marketing year, import requirements for all cereals are anticipated to be at a similar level.

Improved availability of maize helps to stabilise food security

The overall food security situation remains stable, supported by the good availability of maize. Conditions are expected to improve as national supplies are augmented by the current harvest, enabling households to re-build food stocks. Based on sites monitored by the National Early Warning Unit (NEWU), consumption of own grain production has fallen, with households now more reliant on market supplies compared with March 2010. In areas where prices have been increasing and where households are constrained by limited income levels and low food stocks, access to staple food could be hindered. Furthermore, the dry spell that affected production in southern areas will negatively impact households' ability to replenish their food stocks.



Reference Date: 15-April-2011

FOOD SECURITY SNAPSHOT

- Large increase in maize plantings, supported by good availability of seeds and fertiliser
- Prices of maize increase seasonally, with higher prices observed in southern markets
- Food security remains generally stable, following improved availability of maize across the country

Increase in maize plantings, but dry spell impacts crops in southern parts of the country

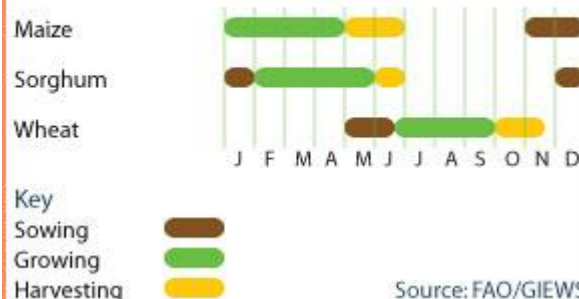
The Government first round crop assessment indicates a large expansion in maize plantings estimated at about 2.1 million hectares, marking a 16 percent increase compared with the previous season's area. By contrast, the planted area of millet and sorghum fell by about 6 and 21 percent respectively. Rainfall patterns from October to January were generally favourable, supporting crop development, but was punctured by a period of heavy rains affecting low lying parts of Midlands, Mashonaland Central and both north and south Matabeleland provinces. This was followed by a dry-spell last February that mostly affected the low producing southern areas, particularly the late planted crops. Nationally about 88 percent of the maize crop was planted by December 2010. During March, rains improved in northern regions, but water deficits continued in some southern and central areas, particularly Masvingo province. Overall crop conditions in the traditional northern maize producing provinces are satisfactory, but crop prospects in parts of the south remain uncertain. The area planted with tobacco and cotton, two important cash crops, grew by nearly 50 percent over last year's levels, whilst there was a drop in sun flower and sugar bean plantings.

As in the previous year, farmers received support from the Government and the humanitarian community in the form of seed and fertilizer inputs distributed either directly or through a closed voucher scheme. On average households assisted through the humanitarian programme received 68 kg of fertilizer and about 4 kg of maize seed, while approximately 64 000 tonnes of fertilizer, in addition to maize and other cereal seeds, were distributed through government programmes. In total an estimated 1.5 million households benefited from input assistance for the 2010/11 season.

Maize grain prices increase seasonally, but level off at the beginning of 2011

In Harare, maize prices, which have increased seasonally since the last quarter of 2010, remained unchanged compared with levels in February 2011. The national average for the current 2010/11 marketing year (April/March) has exceeded last year's levels since October, while the highest prices have been observed in the southern provinces. Imports of maize have continued as normal this marketing year, and FAO/GIEWS estimates that about 180 000 tonnes have been imported up until the end of March 2011, including informal cross border trade. This represents about 92 percent the maize import requirement estimated in last year's Crop and Food Security Assessment Mission

Crop calendar Zimbabwe



Zimbabwe

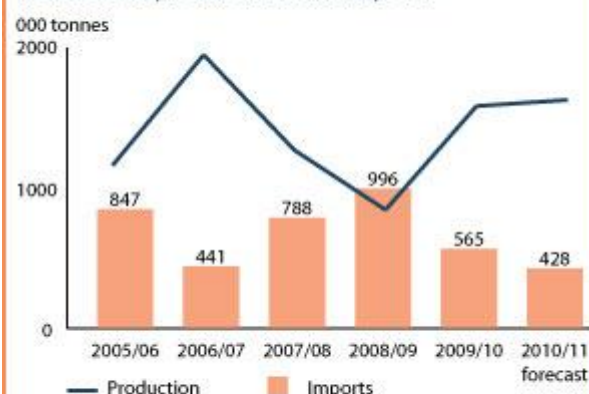
Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Maize	1054	1268	1354	7
Wheat	118	36	30	-17
Sorghum	89	156	132	-15
Others	98	123	111	-10
Total	1359	1583	1626	3

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Zimbabwe

Total cereal production and imports

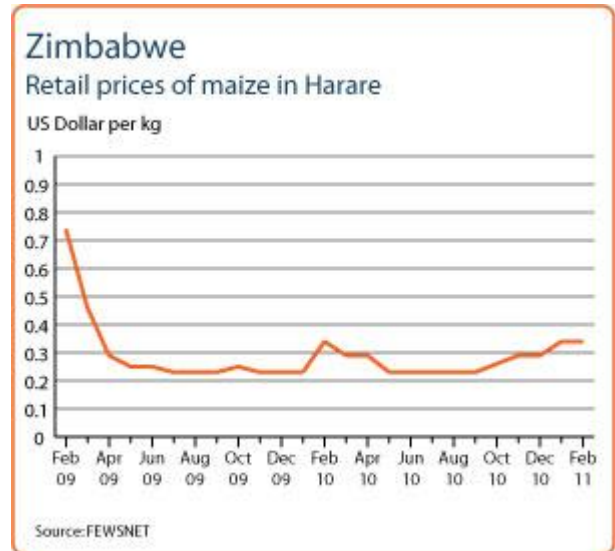


Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

(CFSAM) for the 2010/11 marketing year.

Improved availability of maize helps to stabilise food security

The overall food security situation remains stable, supported by the good availability of maize. Conditions are expected to improve as national supplies are augmented by the early harvest, which normally begins in March, enabling households to re-build food stocks. Based on sites monitored by the National Early Warning Unit (NEWU), consumption of own grain production has fallen, with households now more reliant on market supplies compared with March 2010. In areas where prices have been increasing and where households are constrained by limited income level, access to staple food could be hindered. Under WFP's Seasonal Targeted Assistance programme, an estimated 1 million beneficiaries received food assistance by the end of February 2011.



Reference Date: 03-January-2011

FOOD SECURITY SNAPSHOT

- Agriculture input assistance for the 2010/11 season targets over 900 000 households, an increase from last season
- Good rains support planting activities during November and early December
- Maize grain prices increase, with higher prices observed in deficit producing regions
- Food security conditions stable, but price rise is a concern

Favourable rains benefit planting activities for the 2010/11 season

Maize planting for the main 2010/11 season is complete in most areas across the country. Satellite based rainfall estimates indicate that heavy rains were received in the southern provinces of Matabeleland and Masvingo, benefiting planting activities, during the first two dekads of November, while low rainfall was observed in northern regions over the same period. In the last dekad of November and early December, increased rainfall levels were observed in the north, helping to reduce early seasonal deficits. An estimated 549 000 households have been targeted to receive seed and fertiliser assistance from the humanitarian community. Each input package will, on average, be sufficient to cover an area of 0.25 to 0.5 hectares per household. In addition, the Government has continued its input subsidy programme that will benefit approximately 400 000 households; inputs are distributed through the Grain Marketing Board depots. Combined, both the government and humanitarian input programmes have increased the number of beneficiaries receiving subsidised inputs. However, input prices have remained high and this may affect the level of plantings of farmers not benefiting from the input subsidy programmes.

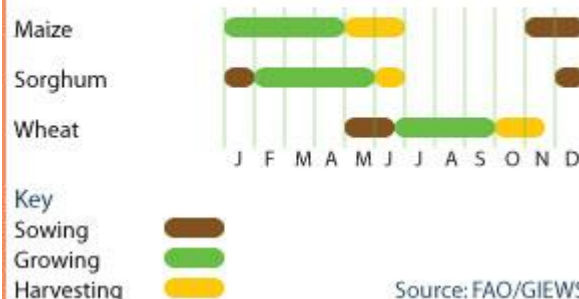
Enlarged cereal production for 2009/10 season

A joint FAO/WFP Crop and Food Supply Assessment Mission (CFSAM), conducted in June 2010, concluded that national maize production in 2010 increased by 7 percent over the previous year output, to 1.35 million tonnes; despite unevenly distributed rains in southern and eastern areas. An extensive input programme contributed to the larger maize harvest through a 20 percent expansion in the maize area planted to an historical high of 1.8 million hectares.

Maize grain price increase following a period of stability

Between September and November, maize grain prices rose by some 26 percent in Harare to USD 0.29/kg, following generally stable conditions in the preceding months. However, prices of maize meal declined in October compared to levels in September. Elsewhere, maize grain prices ranged in October from USD 0.23 to 0.40 per kilo, with higher prices generally observed in the deficit producing areas of Masvingo and Matabeleland South. The liberalization of the grain market has assisted in improving the availability of cereal products in the country and heightened the role of the commercial sector in satisfying national cereal requirements. Estimates indicate that the cumulative quantity of maize meal imported through informal channels

Crop calendar Zimbabwe



Zimbabwe

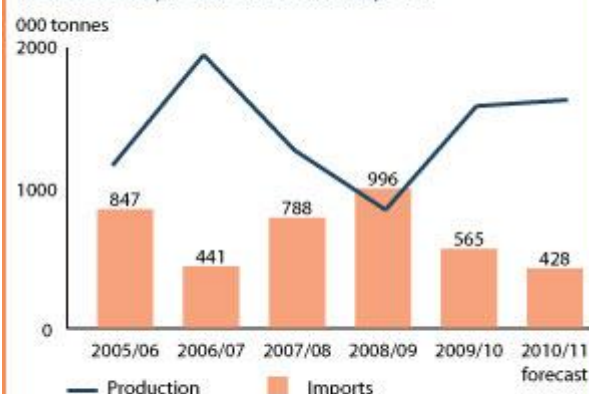
Cereal production

	2005-2009	2009	2010	change
	average		forecast	2010/2009
	000 tonnes		percent	
Maize	1054	1268	1354	7
Wheat	118	36	30	-17
Sorghum	89	156	132	-15
Others	100	123	111	-10
Total	1361	1583	1626	3

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Zimbabwe

Total cereal production and imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

during the current marketing year (April/March) from South Africa is over three times larger than the level in the previous year.

Stable food security conditions, but increasing prices remain a concern

The overall food security situation remains stable; however, based on sites monitored by the National Early Warning Unit (NEWU) consumption of own grain production has fallen, with households now more reliant on market supplies. The higher maize grain prices observed in October and November could have a negative impact on households' consumption levels. The Zimbabwe Vulnerability Committee's assessment in May 2010 estimated that 1.3 million rural people will be food insecure during the peak lean season from January to March 2011. Manicaland and Masvingo, two provinces projected to have the highest number of food insecure persons, also experienced the largest drop in maize production relative to last season. Distribution of food aid is on-going, and is expected to reach approximately 900 000 people; in October close to 400 000 people received food assistance through WFP's safety net programmes.



Reference Date: 15-September-2010

FOOD SECURITY SNAPSHOT

- Significant expansion in area planted for the 2009/10 season, contributes to a second consecutive increase in maize production.
- Liberalised grain market improves national cereal availability.
- The national average maize prices remains stable, under USD 0.30 per kg.
- Food security conditions improve, but an estimated 1.68 million people require food assistance, predominantly located in areas that experienced a poor maize harvest this year.

Improved maize harvest, but millet and sorghum production decline for 2009/10 season

A joint FAO/WFP Crop and Food Supply Assessment Mission (CFSAM), conducted in June 2010, concluded that national maize production in 2010 increased by 7 percent over last season's output, to 1.35 million tonnes. Despite unevenly distributed rains in southern and eastern areas, an extensive input programme contributed to the larger maize harvest, which supported a significant expansion in the maize area planted to an historical high of 1.8 million hectares. This represents a rise of 20 percent over the previous year's level and more than compensated for the lower yields recorded this year, due to the mid-season dry spell in December and January. The dry spell affected in particular Manicaland and Masvingo provinces where rainfall levels were approximately 50 percent below the average (1996-2009) during the two aforementioned months.

In contrast to maize, millet and sorghum production fell by 16 and 15 percent respectively, due to a contraction in the area planted and a reduction in yields but remained well above the previous five-year average.

Wheat production has fallen drastically since 2006, and this decline has continued in 2010 with an estimated production of 30 000 tonnes. The high cost of inputs, poor maintenance of irrigation facilities and erratic electricity supplies, are all considered to have contributed to the lower area planted and production levels. Cash crop production, such as cotton and groundnuts, also fell with the exception of tobacco. This decline is attributed to erratic rainfall and a decrease in area planted due to the lower prices offered to farmers last season.

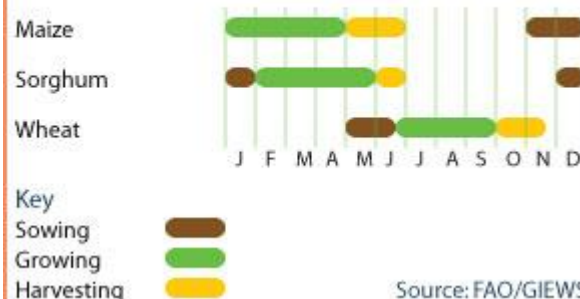
For the 2010/11 agricultural season - planting is scheduled to begin in November - about 475 000 households have been targeted to receive seed and fertiliser assistance. On average the support should be sufficient to cover an area of 0.25 to 0.5 hectares per household.

Livestock conditions are reported to be fair to good for all classes of livestock across the country. However, the situation in Matabeleland South and Masvingo is of concern, where grazing is not likely to last up to the next rainy season.

Liberalised grain market improves food availability

Maize prices on the whole have declined and remain stable this year,

Crop calendar Zimbabwe



Zimbabwe

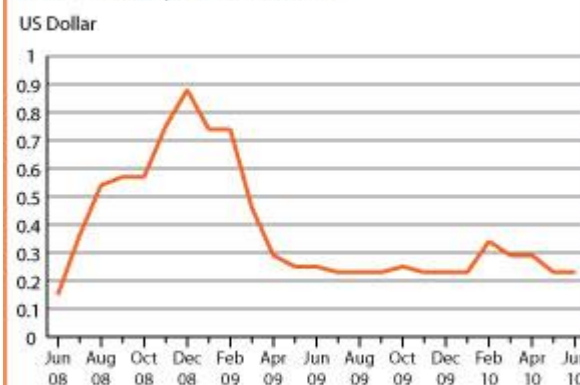
Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Maize	1048	1243	1328	7
Wheat	118	36	30	-17
Sorghum	89	156	132	-15
Others	100	123	111	-10
Total	1356	1557	1600	3

Note: percentage change calculated from unrounded data. Source: FAO/GIEWS Country Cereal Balance Sheets

Zimbabwe

Retail maize price in Harare



Source: WFP/CFSAM/FEWSNET

with an average national price below USD 0.30/kg, as of July. In Harare, prices fell from February to May, conforming to annual seasonal trends, and remained stable into July at USD 0.23/kg.

The liberalization of the grain market has improved the availability of cereal products in the country and heightened the role of the commercial sector in meeting national cereal requirements. The Government parastatal, Grain Marketing Board (GMB), will continue to act as the buyer of last resort to maintain a floor price; however, limited financial liquidity and high overhead costs have constrained the institution's operations.

Overall food security situation remains stable

The overall food security situation remains stable; however, based on sites monitored by the National Early Warning Unit (NEWU) consumption of own grain production in July was lower than in the previous year. This is attributed to a fall in production in areas affected by the mid-season dry spell

The CFSAM has estimated that approximately 1.68 million people will require food assistance in the 2010/11 marketing year (April March), with Manicaland and Masvingo projected to have the highest number of food insecure persons between January and March (peak lean season); these two provinces also experienced the largest drop in maize production relative to last season. The number of people in need of assistance includes both the transitory and chronically food insecure, and an estimated 111 000 tonnes of cereals is required to assist the affected population until the new harvest becomes available in March 2011.

Reference Date: 20-April-2010

FOOD SECURITY SNAPSHOT

- First estimate of 2010 cereal crop shows a small increase from last year due to larger plantings offsetting lower yields
- Overall food security remains favourable aided by the availabilities of new crop supplies in the market, but likely to deteriorate in the 2010/11 marketing year in several provinces
- A larger number of rural households especially in eastern and southern areas affected by reduced 2010 crop output are likely to require food assistance in the next year

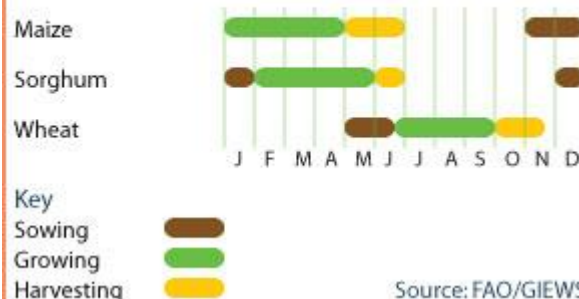
2010 overall cereal output better than last year, in spite of irregular rains

The first forecast for 2010 coarse grain crops indicate a small increase from last year's in spite of unfavourable weather in several provinces. According to the official Second Round Crop Assessment, plantings of maize, the main summer crop, have increased by 20 percent and this has more than offset the decline in yields per hectare which are estimated at 10 percent. The increase in maize plantings is much higher than earlier anticipated. Maize production for 2010 is forecast at 1.33 million tonnes against 1.24 million tonnes harvested last year and 27 percent above the average of the previous five years. By contrast, a reduction is anticipated for sorghum and millet due to lower plantings and reduced yields. At national level, the increase in the maize crop production estimate from earlier expectations reflects, in addition to the larger estimate of the area planted, the resumption of rains in February and their continuation throughout March in most provinces which arrested the damage to yields for early planted crops and favoured development of late planted crops. At the provincial level, large maize crop increases are expected in the northern, central and western provinces while sharp declines are forecast for southern and eastern provinces of Masvingo, Manicaland and Matabeleland South which were heavily affected by a long dry spell in December – January. These provinces are also expecting a reduced sorghum and millet crop because of lower area planted and yields and severe food problems are anticipated in these traditionally deficit provinces in 2010/11. For wheat, prospects for the 2010 crop about to be planted are unfavourable due to shortage of inputs and a reduction in output is tentatively forecast for 2010.

Production of other crops such as groundnuts, cotton, soybeans, sugar and sunflower are expected to be sharply lower reflecting both reduced area (except groundnuts) and lower yields due to the erratic weather. The only crop showing a sharp increase is tobacco which is estimated to rise to about 64,000 tons, or 34 percent from 2009, due to an increase of area planted by 41 percent.

Livestock conditions are reported to be fair to good for all classes of livestock across the whole country. Grazing condition in most communal areas are poor to fair while are generally good in other areas. Of particular concern is the grazing situation in Matabeleland South and Masvingo where grazing is not likely to last up to the next rainy season.

Crop calendar Zimbabwe



Zimbabwe

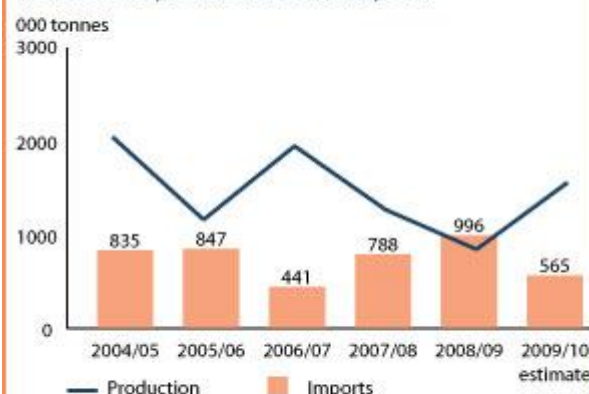
Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Maize	1048	1243	1328	7
Wheat	118	36	30	-17
Sorghum	89	156	132	-15
Others	100	123	111	-10
Total	1356	1557	1600	3

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Zimbabwe

Total cereal production and imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

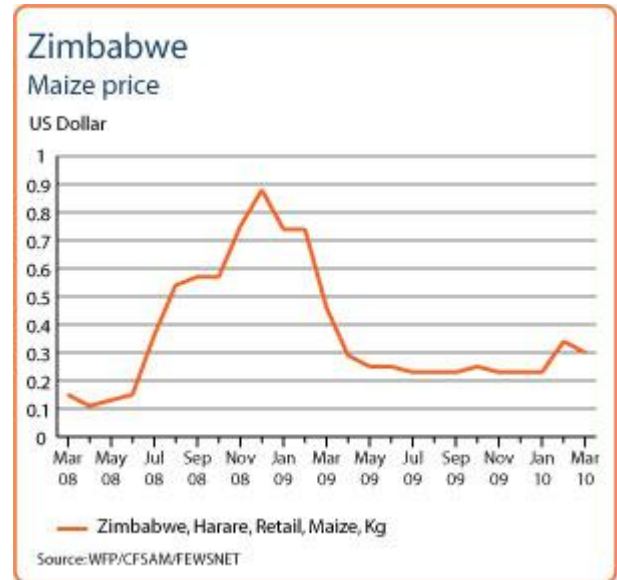
Overall food security situation remains stable, but expected to deteriorate in the next marketing year in southern and eastern provinces

Because of the good 2009 crop, food supplies in the market have remained adequate throughout the recently ended 2009/10 marketing season (April/March) with prices of maize remaining stable for many months. The liberalized trade of staple cereals has encouraged the flow of commodities to deficit areas and contributed to the improvement of the food situation compared to the previous year. There was a sudden price rise in February, probably reflecting the concern about the outlook for the 2010 maize crop, but prices have levelled off in March. (see chart). Maize and other crops from the new harvest have started to become available in most areas and the lean season has ended. The food security situation is expected to remain stable in the coming 2010/11 marketing year in most provinces reflecting the expectations of a good harvest.

However, in the traditionally food insecure southern and eastern provinces where maize and other cereal crops has been severely affected, the food security situation is expected to deteriorate rapidly in the next few months. The Zimbabwe Vulnerability Assessment Committee (ZimVac) plans to undertake in May its first assessment of the number food insecure people requiring food assistance in 2010/11. Current expectations are that a large part of the rural populations in Matabeleland South, Masvingo and Manicaland will need considerable food assistance to meet their requirements as they lack resources to access their food needs from the market.

Policies liberalising grain markets to continue

The Government has implemented a number of grain market reforms in 2009 to liberalize the market, including the free movement and buying and selling of grain in the country and designation of the Government parastatal, Grain Marketing Board (GMB), as a buyer of last resort to maintain the floor price. In addition, duty-free regulation on imports for basic food commodities has been maintained throughout 2009. These measures which have greatly contributed to the stability of the market and of food security in the last marketing year are expected to continue also in 2010/11.



Reference Date: 15-March-2010

FOOD SECURITY SNAPSHOT

- Reduced 2010 cereal crop anticipated due to prolonged drought in December-January.
- Overall food security still favourable aided by ample supplies in the market, but likely to deteriorate in the next marketing year (April/March).
- A larger number of rural households especially in eastern and southern areas affected by the drought are likely to require food assistance in the next year.

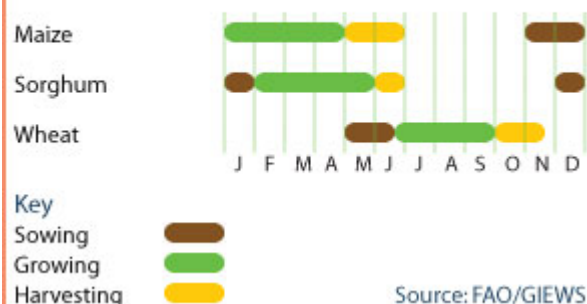
Lower 2010 cereal output expected

Early season rains and availabilities of inputs favoured maize plantings in November, somewhat earlier than normal. Rainfall was well distributed until around mid-December when a dry spell associated with high temperatures in south and central regions have seriously affected the maize crop, while in the north mostly favourable conditions continued. The dry spell persisted until late January especially in Masvingo, south of Manicaland and Matabeleland South provinces. Rains resumed in late January and continued to be normal to above normal throughout February but where too late to reverse the crop damage especially for the early planted crops (54 percent planted in November) which were affected by the dry spell at the critical flowering stage. The resumption of the rains arrested the damage to the crops planted in December (39 percent of total), but low yields are expected. Some 8 percent of the maize was planted in January and favourable outcome for these plantings depend crucially on the rains continuing in March.

The Government first round crop assessment released in late February shows that the total area planted to summer cereals (maize, sorghum and millet) this year had increased by some 95 000 ha or 4.4 percent compared to the previous year, of which that planted to maize increasing by 216 000 ha or 14 percent while that for sorghum and millet falling by 121 000 ha or 19 percent. The maize area completely lost because of the dry spell is estimated at over 200 000 ha or 11.6 percent of the total planted area with the largest percentage losses in Manicaland (39 percent), Matabeleland South (25 percent) and Masvingo (14 percent). In the remaining areas of these provinces and also in parts of Mashonaland Central most of the crop was in poor to fair conditions and reduced yields are expected. The crop was mostly in fair conditions in the other Mashonaland provinces with some pockets of exceptionally good crops expected across the country. Livestock and grazing conditions were mostly favourable and rains in February have helped relieve water shortages in several areas.

The second crop assessment which will produce the first estimate for the 2010 cereal crop production will be undertaken in late March with results likely to be available before mid-April. Even assuming a continuation of the rains throughout March, a considerable reduction in cereal production from last year good level is anticipated for 2010.

Crop calendar Zimbabwe



Zimbabwe

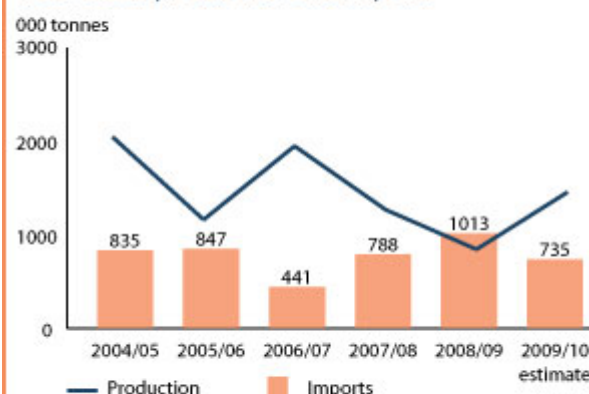
Cereal production

	2004-2008 average	2008	2009 estimate	change 2009/2008
	000 tonnes		percent	
Maize	1137	647	1140	76
Wheat	135	33	36	9
Sorghum	84	75	156	108
Others	97	89	123	38
Total	1453	844	1455	72

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Zimbabwe

Total cereal production and imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Food security situation remains stable, but expected to deteriorate in the next marketing year

Because of the good 2009 crop season food supplies in the market have remained adequate in the 2009/10 marketing season and prices of maize have remained stable for several months. However, in February there has been a sudden rise, probably reflecting the expectations of a reduced maize crop this year (see chart). With the lean season well underway many rural households still have stocks indicating still a generally favourable food security situation and in areas not affected by the drought early planted green maize is now becoming available. In addition, the liberalized trade of staple cereals has encouraged the flow of commodities to deficit areas and contributed to the improvement of the food situation compared to the previous year, but this could rapidly change if current unfavourable prospects for the new crop materialize. In addition, a large number of rural and urban household lack resources to access their food needs from the market. According to the latest report by the Zimbabwe Vulnerability Assessment Committee (ZimVac) the number of food insecure people requiring food assistance in the January-March 2010 lean season period is 2.17 million people (20 percent of total population), a figure about 25 percent higher than in the October-December 2009 period but still much lower than a year earlier when 6 million people required food aid.

The food security situation is expected to deteriorate in the next marketing year (April 2010-March 2011) reflecting the anticipated reduction in 2010 crops in many regions. A first ZimVac assessment for 2010/11 of the food insecure people requiring food assistance is planned for the second half of April. Substantially lower level of production is expected in southern and eastern part of the country. Poor households in these areas will have to rely more than in the previous year on the market and on assistance to meet their food needs, especially in the second half of the marketing season.

Policies liberalise grain market

The Government has implemented a number of grain market reforms in 2009 to liberalize the market, including the free movement and buying and selling of grain in the country and designation of the Government parastatal, Grain Marketing Board (GMB), as a buyer of last resort to maintain the floor price. In addition, duty-free regulation on imports for basic food commodities has been maintained throughout 2009. These measures have greatly contributed to the stability of the market and of food security in the last year.

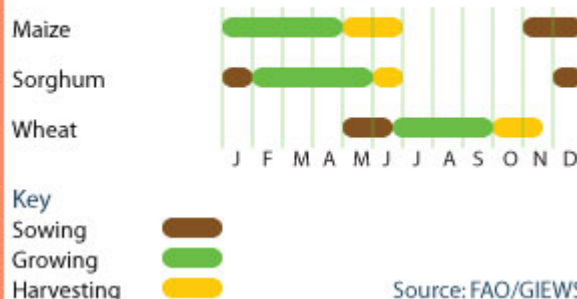


Reference Date: 3 February-2010

FOOD SECURITY SNAPSHOT

- Prospects for 2010 crops now poor due to prolonged dry weather from late December
- 2009 aggregate cereal production was almost double the previous year's drought-affected level but still insufficient to meet requirements
- Overall food security still favourable aided by ample supplies in the market, but could change rapidly if the new crop fails
- A large number of rural households still lack resources to access food from the market and require food assistance. WFP and NGOs food distribution under way.

Crop calendar Zimbabwe



Prospects for 2010 cereal production poor after a prolonged dry spell in late December – early January

Weather conditions had been mostly favourable in the first part of the season favouring increased plantings and early development of main season cereal crops (mostly maize). However since the late December a severe four weeks dry spell has severely affected the crop throughout the country. Although rains resumed in late January they were too late to benefit crops in most areas. Prospects are poor in the northern important producing provinces of Mashonaland East, Central and West, in the centre in the provinces of Midlands, Masvingo and Manicaland and in the south Matabeleland South. Official Government reports depicts the situation serious and are urging farmers to refrain from applying top dressing fertilizers which in absence of moisture would further damage the crop. In some areas farmers were planning to replant if rains resume, but this would be risky as the season is too far advanced. Government is conducting a first crop assessment covering the whole country to provide early quantification of the likely crop losses. Results are expected by mid-February.

The season had started under favourable premises This was mainly due to the improved availability of inputs and the early onset of the rainy season. The government with assistance from donors has been implementing several input support programmes which have targeted a total of 1.3 million communal farmers for the 2009/10 season, a much higher number than assisted in 2008/09. However, the implementation of these programmes has been seriously delayed.

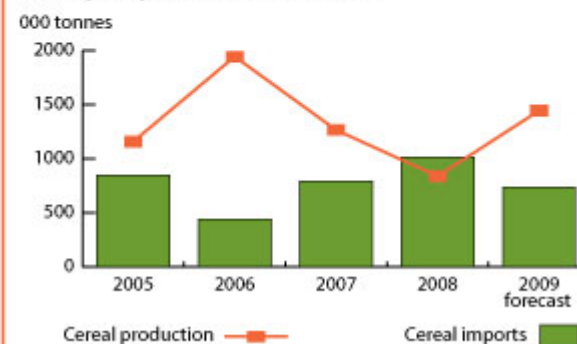
Significant increase in 2009 cereal production but import requirements remain high

Aggregate cereal production in 2009 was about 1.5 million tonnes, some 72 percent above the poor crop in 2008. However this level of cereal production is still much below consumption requirements leaving a deficit of over 700 000 tonnes to be met by imports in 2009/10 marketing year (April/March), although substantially below the previous year. Following the liberalization of the economy, it is expected that commercial imports in the 2009/10 could account for more than 500 000 tonnes. Commercial imports records as of mid-December show that over 330 000 tonnes of maize and wheat had already been contracted for. In addition some 120 000 tonnes of cereal food aid had

Zimbabwe Cereal production and imports

Cereal production	2004-2008	2008	2009	change*
	average		forecast	2009/2008
	000 tonnes			percent
Maize	1137	647	1140	76.2%
Wheat	135	31	27	-11.9%
Sorghum	84	75	156	108%
Other	98	86	123	42.5%
Total Cereals	1450	839	1446	72.3%

* Percentage change calculated from unrounded data.



Source: FAO/GIEWS Country Cereal Balance Sheets

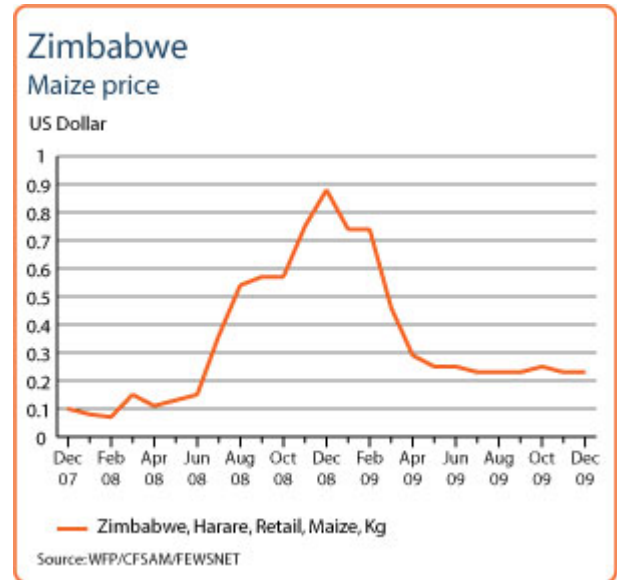
also been shipped or committed.

Food security situation remain stable, but assistance still required for large sections of population

Ample food supplies in the market, stable prices in recent months (see chart) and adequate stocks in most rural households indicate a generally improved food security situation. However this could rapidly change if current expectations of a poor 2010 crop materialize. In recent months, the liberalized trade of staple cereals has encouraged the flow of commodities to deficit areas and contributed to the improvement of the food situation compared to the previous year. Nevertheless, a large number of rural and urban household lack resources to access their food needs from the market. According to the latest report by the Zimbabwe Vulnerability Assessment Committee (ZimVac) the number of food insecure people requiring food assistance in the January-March 2010 lean season period is 2.17 million people (20 percent of total population), a figure about 25 percent higher than in the October-December 2009 period but still much lower than a year earlier when 6 million people required food aid. WFP and NGOs plan to provide food assistance to most of the 2.17 million targeted populations. Total food aid distribution was expected last December to total around 130 000 tonnes in the 12-month period from April 2009 to March 2010.

Policies liberalise grain market

The Government has implemented a number of grain market reforms in 2009 to liberalize the market, including the free movement and buying and selling of grain in the country and designation of the Government parastatal, Grain Marketing Board (GMB), as a buyer of last resort to maintain the floor price. In addition, duty-free regulation on imports for basic food commodities has been maintained throughout 2009. In view of the improved food supply situation the continuation of this measure is currently under reviewed.

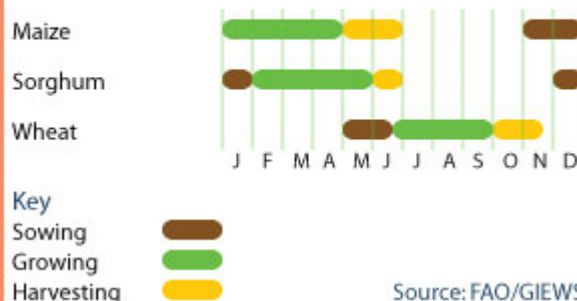


Reference Date: 21-January-2010

FOOD SECURITY SNAPSHOT

- Prospects for 2010 crops now poor due to prolonged dry weather since late December
- 2009 aggregate cereal production was almost double the previous year's drought-affected level but still insufficient to meet requirements
- Overall food security still favourable aided by ample supplies in the market, but could change rapidly if the new crop fails
- A large number of rural households still lack resources to access food from the market and require food assistance. WFP and NGOs food distribution under way.

Crop calendar Zimbabwe



Prospects for 2010 cereal production poor after a prolonged dry spell in late December – early January

Weather conditions had been mostly favourable in the first part of the season favouring increased plantings and early development of main season cereal crops (mostly maize). However since the last days of December a severe three weeks dry spell has severely affected the crop throughout the country. In the north the important provinces of Mashonaland East, Central and West were affected, in the centre the provinces of Midlands, Masvingo and Manicaland and in the south Matabeleland South. Official Government reports depicts the situation serious and are urging farmers to refrain from applying top dressing fertilizers which in absence of moisture would further damage the crop. In some areas farmers were planning to replant if rains resume, but this would be risky as the season is too far advanced. Government is preparing for a first crop assessment covering the whole country to provide early quantification of the likely crop losses.

The season had started under favourable premises This was mainly due to the expected improved availability of inputs and the early onset of the rainy season. The government with assistance from donors has been implementing several input support programmes which have targeted a total of 1.3 million communal farmers for the 2009/10 season, a much higher number than assisted in 2008/09. However, the implementation of these programmes has been seriously delayed.

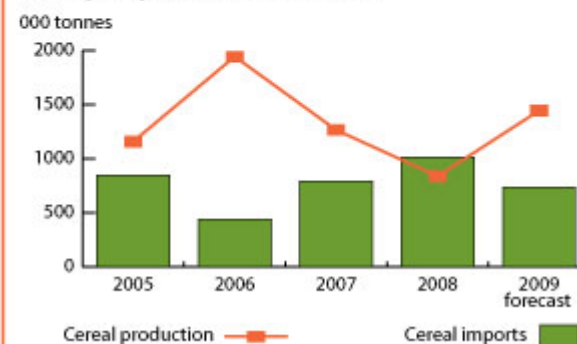
Significant increase in 2009 cereal production but import requirements remain high

Aggregate cereal production in 2009 was about 1.5 million tonnes, some 72 percent above the poor crop in 2008. However this level of cereal production is still much below consumption requirements leaving a deficit of over 700 000 tonnes to be met by imports in 2009/10 marketing year (April/March), although substantially below the previous year. Following the liberalization of the economy, it is expected that commercial imports in the 2009/10 could account for more than 500 000 tonnes. Commercial imports records as of mid-December show that over 330 000 tonnes of maize and wheat had already been contracted for. In addition some 120 000 tonnes of cereal food aid had also been shipped or committed.

Zimbabwe Cereal production and imports

Cereal production	2004-2008	2008	2009	change*
	average		forecast	2009/2008
	000 tonnes			percent
Maize	1137	647	1140	76.2%
Wheat	135	31	27	-11.9%
Sorghum	84	75	156	108%
Other	98	86	123	42.5%
Total Cereals	1450	839	1446	72.3%

* Percentage change calculated from unrounded data.



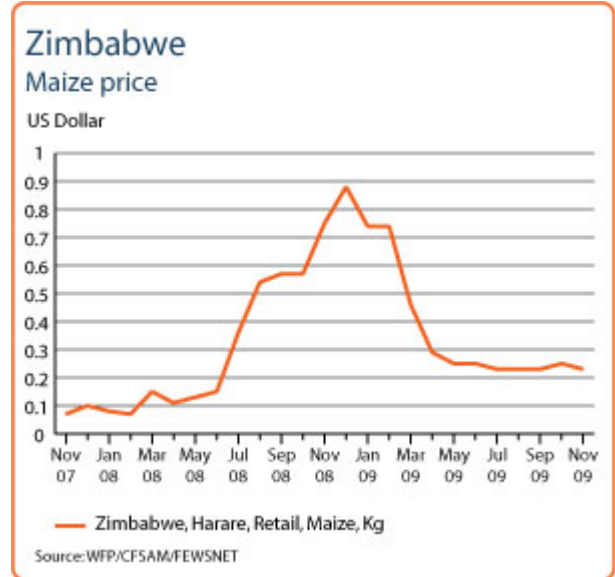
Source: FAO/GIEWS Country Cereal Balance Sheets

Food security situation remain stable, but assistance still required for large sections of population

Ample food supplies in the market, stable prices in recent months (see chart) and adequate stocks in most rural households indicate a generally improved food security situation. However this could rapidly change if current expectations of a poor 2010 crop materialize. In recent months, the liberalized trade of staple cereals has encouraged the flow of commodities to deficit areas and contributed to the improvement of the food situation compared to the previous year. Nevertheless, a large number of rural and urban household lack resources to access their food needs from the market. According to the latest report by the Zimbabwe Vulnerability Assessment Committee (ZimVac) the number of food insecure people requiring food assistance in the January-March 2010 lean season period is 2.17 million people (20 percent of total population), a figure about 18 percent higher than previously estimated. WFP and NGOs are providing food assistance to most of these populations. Total food aid distribution was expected last December to total around 130 000 tonnes in the 12-month period from April 2009 to March 2010.

Policies liberalise grain market

The Government has implemented a number of grain market reforms in 2009 to liberalize the market, including the free movement and buying and selling of grain in the country and designation of the Government parastatal, Grain Marketing Board (GMB), as a buyer of last resort to maintain the floor price. In addition, duty-free regulation on imports for basic food commodities has been maintained throughout 2009. In view of the improved food supply situation the continuation of this measure is currently under reviewed.



Reference Date: 7-January-2010

FOOD SECURITY SNAPSHOT

- Early prospects for 2010 crops mostly promising so far
- 2009 aggregate cereal production was almost double the previous year's drought-affected level but still insufficient to meet requirements
- Overall food security favourable aided by ample supplies in the market
- However, a large number of rural households lack resources to access food from the market and require food assistance. WFP and NGOs food distribution under way.

Early prospects for 2010 cereal production mostly promising so far

Weather conditions have been mostly favourable so far for the planting and early development of main season cereal crops (mostly maize). As of late December maize crop conditions were good to very good in all areas except in some north eastern and southern areas where rains deficits were reported. Area planted as of mid-December had increased sharply as compared to the previous year for maize (+93 percent) and for all other major summer crops except soybeans. This reflects mainly the improved availability of inputs and the early onset of the rainy season. The government with assistance from donors is implementing several input support programmes which have targeted a total of 1.3 million communal farmers for the 2009/10 season, a much higher number than assisted in 2008/09. Implementation of some of these programmes was delayed as of mid-December and efforts were under way to speed up the delivery of maize seeds and fertilizers to meet the planting date deadline.

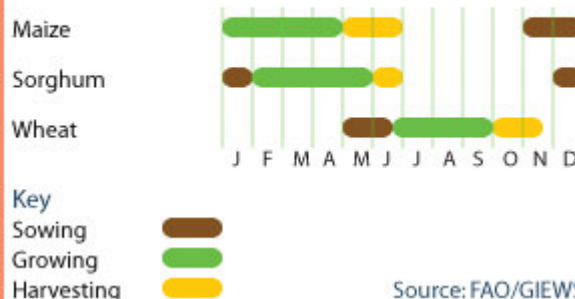
Significant increase in 2009 cereal production but import requirements remain high

Aggregate cereal production in 2009 was about 1.5 million tonnes, some 72 percent above the poor crop in 2008. However this level of cereal production is still much below consumption requirements leaving a deficit of over 700 000 tonnes to be met by imports in 2009/10 marketing year (April/March), although substantially below the previous year. Following the liberalization of the economy, it is expected that commercial imports in the 2009/10 could account for more than 500 000 tonnes. Commercial imports records as of mid-December show that over 330 000 tonnes of maize and wheat had already been contracted for. In addition some 120 000 tonnes of cereal food aid had also been shipped or committed.

Food security situation stable, but assistance still required for large sections of population

Ample food supplies in the market, stable prices in recent months (see chart) and adequate stocks in most rural households indicate a generally improved food security situation. In addition, the liberalized trade of staple cereals has encouraged the flow of commodities to deficit areas and contributed to the improvement of the food situation compared to the previous year. Nevertheless, a large number of rural and urban household lack resources to access their food needs from

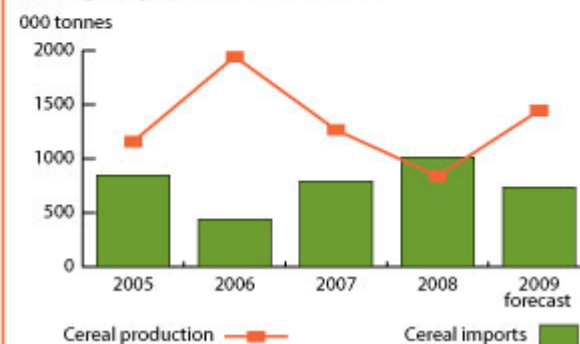
Crop calendar Zimbabwe



Zimbabwe Cereal production and imports

Cereal production	2004-2008	2008	2009	change*
	average		forecast	2009/2008
	000 tonnes			percent
Maize	1137	647	1140	76.2%
Wheat	135	31	27	-11.9%
Sorghum	84	75	156	108%
Other	98	86	123	42.5%
Total Cereals	1450	839	1446	72.3%

* Percentage change calculated from unrounded data.

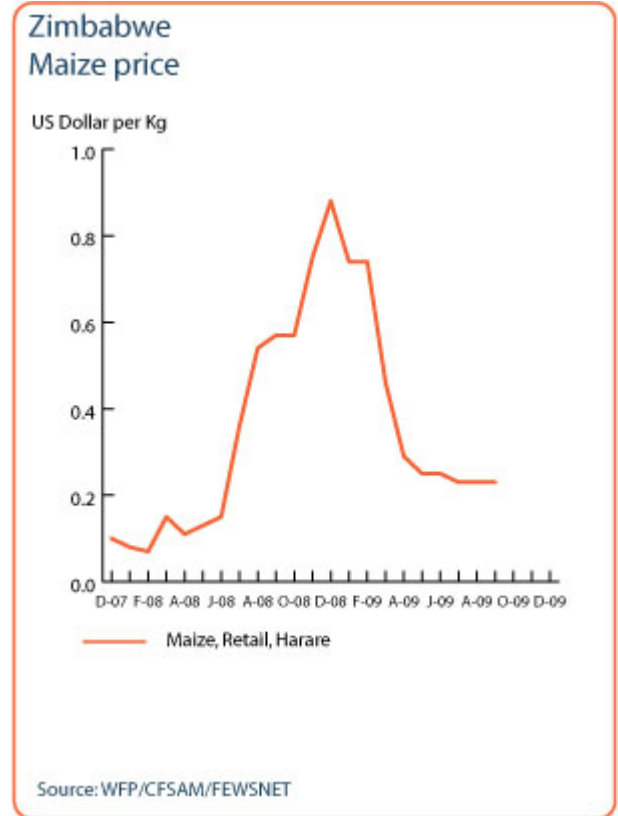


Source: FAO/GIEWS Country Cereal Balance Sheets

the market. According to the latest report by the Zimbabwe Vulnerability Assessment Committee (ZimVac) the number of food insecure people requiring food assistance in the January-March 2010 lean season period is 2.17 million people (20 percent of total population), a figure about 18 percent higher than previously estimated. WFP and NGOs are providing food assistance to most of these populations. Total food aid distribution is expected to total around 130 000 tonnes in the 12-month period from April 2009 to March 2010.

Policies liberalise grain market

The Government has implemented a number of grain market reforms in 2009 to liberalize the market, including the free movement and buying and selling of grain in the country and designation of the Government parastatal, Grain Marketing Board (GMB), as a buyer of last resort to maintain the floor price. In addition, duty-free regulation on imports for basic food commodities has been maintained throughout 2009. In view of the improved food supply situation the continuation of this measure is currently under reviewed.



Reference Date: 10-September 2009

FOOD SECURITY SNAPSHOT

- 2009 aggregate cereal production almost double last year's drought affected level
- Wheat production continues declining trend
- Liberalized grain market and improved availability helps to lower cereal prices
- CFSAM estimated that about 2.8 million people require food aid in the amount of 180 000 tonnes of cereals during 2009/10 marketing year (April/March)

Significant increase in 2009 cereal production, but import requirements remain high

Production levels for the winter wheat crop, harvested in September, are estimated to be below average, due to high input costs and an inconsistent power supply that affects irrigation systems. By mid-May 2009 only 500 tonnes of seeds were sold by Seed Co. (which holds about 80 percent of the market share for hybrid maize), compared to a normal year when 4000 – 6000 tonnes are sold. Latest official estimates from the Ministry of Agriculture (MoA), July 2009, reveal that the area planted decreased to 18 201 hectares in 2009 from 31 663 hectares last year, with an anticipated harvest of 27 300 tonnes. Following the good coarse grain harvest in the first half of the year, aggregate cereal production for 2009/10 is estimated to be approximately 1.4 million tonnes. This level of cereal production still falls below the national utilization level of 1.74 million tonnes (food use only), leaving a deficit of 344 000 tonnes. Following the liberalisation of the economy, it is expected that commercial imports will account for up to 500 000 tonnes to cover for all utilization requirements. However, severe shortages of foreign reserves in the country may contribute to limiting the private sector's capacity to import cereals.

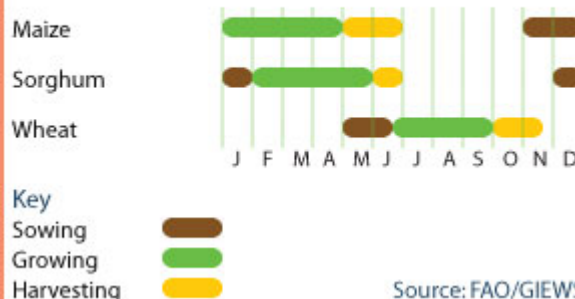
Input support provided to farmers for forthcoming season

Planting of the 2009/10 maize crop is scheduled to start in November, with land preparations underway. Approximately 600 000 small-scale farmers are being targeted through an FAO implemented programme, which will provide free maize seeds and fertilizers for one hectare per household. Furthermore, a Government-private sector programme aims to provide inputs to farmers on credit, targeting an additional 600 000 farmers.

Policies liberalise grain market

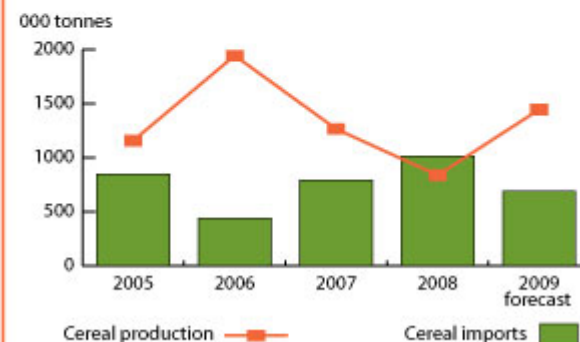
The Government implemented a number of grain market reforms in March 2009 to liberalise the market, including the free movement and buying and selling of grain in the country and designation of the Government parastatal, Grain Marketing Board (GMB), as a buyer of last resort to maintain the floor price. In addition, duty-free regulation on imports for basic food commodities has been extended until December 2009 contributing to lower prices during the lean season. However, the volume of commercial imports will be constrained by the low financial liquidity. Maize prices in Harare decreased by 74 percent between December 2008 (peak price) and August 2009

Crop calendar Zimbabwe



Cereal production and imports Zimbabwe

Cereal production	2004-2008	2008	2009	change
	average		forecast	2009/2008
	000 tonnes			percent
Maize	1137	647	1140	76.2%
Wheat	135	31	27	-12.9%
Sorghum	84	75	156	108%
Other	98	86	123	43%
Total Cereals	1450	839	1446	72.3%



Source: FAO/GIEWS Country Cereal Balance Sheets

reflecting increased market supplies.

Food assistance still required for large sections of population

The joint FAO/WFP Crop and Food Supply Assessment Mission conducted in April/May 2009 estimated that a total of 2.8 million people in rural and urban areas will be food insecure during the 2009/10 marketing year (April/March) and will require food assistance amounting to some 228 000 tonnes (including 190 000 tonnes of cereals). Individual households stocks are predicted to last until early October. These estimates, however, will need to be updated based on the findings of the rural ZimVAC household assessment planned for September/October 2009.

