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FOOD SECURITY MONITORING REPORT

February 2021

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Highlights



The cumulative number of confirmed cases increased from 33,271 cases including 1,193 deaths in 31 January 2021 to 35,994 cases including 1,458 deaths by 28 February 2021.



The government rolled out a COVID-19 vaccination programme which priorities frontline workers after receiving 200,000 doses (to cover 100,000 people) of the Sinopharm vaccines donated by China.



The level 4 lockdown restrictive measures were downgraded to level 1 paving way for the reopening of both formal and informal businesses which are not classified as essential services and were not allowed to operate during the lockdown.



The country continued to receive above normal rainfall during the month of February leading to water logging in some parts of the country. Crop and livestock conditions were reported to be good in most districts with harvest expected to start around April 2021.



Annual inflation continues to record a decline from 363% recorded in January to 322% in February 2021. Food inflation followed a similar trend decreasing from 369% in January to 359% in February 2021.



The Zimbabwe Hunger Map LIVE showed the number of people experiencing insufficient food consumption at 5.6 million during the last week of February, indicating an increase of 500,000 people over the previous month. The use of food-based coping also reportedly increased during February.



Supply of maize grain on the formal markets remained critically low, estimated to be available in only 3% of monitored markets, while availability of maize meal remained stable at an average of 69%.



Prices for bond notes payments for the basic food items monitored increased by an average of 8% compared to January 2021, with the highest increase recorded for maize grain at an average of 15%.



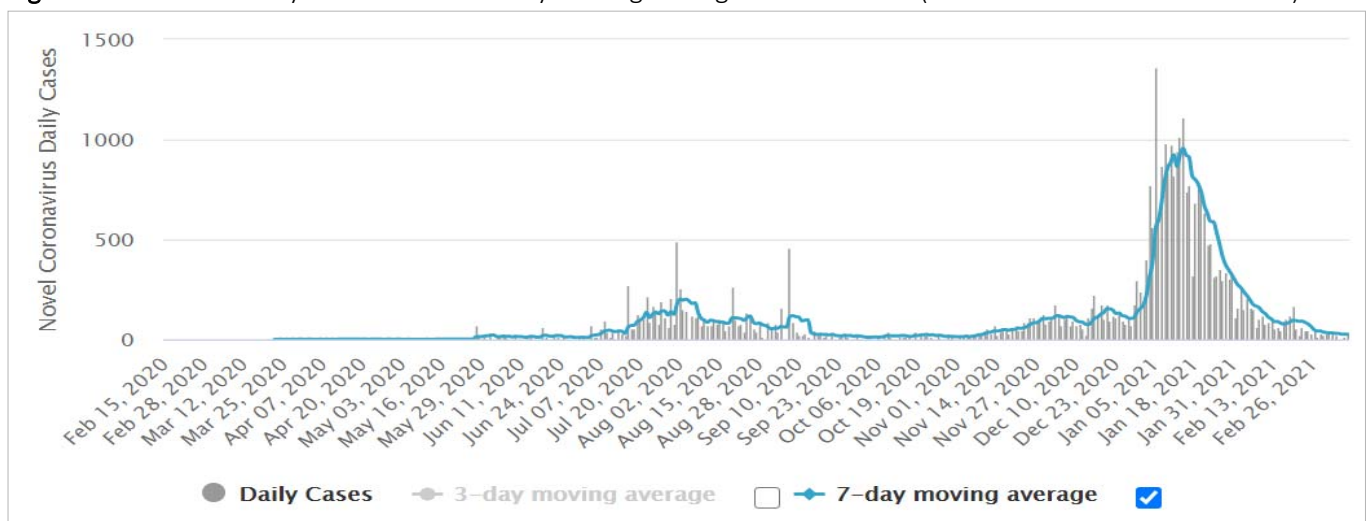
Prices in USD increased for the basic food items monitored by an average of 5% compared to January 2021, with highest price increases reported for maize grain (9%) and sugar beans prices remained stable.

1. Update on the COVID-19 Situation

The COVID-19 situation in the country improved in February compared to January, when more than 50% of the cumulative confirmed cases were recorded since the outbreak of the pandemic in March 2020. During the month of February, a total of 2,606 new cases (7% of the total cumulative caseload) were reported in comparison to 19,404 cases (54%) reported in January. The average number of daily new cases decreased from 700 in January to less than 20 in February 2021 (**Figure 1**). The number of confirmed cumulative cases increased from 33,271 cases including 1,193 deaths in 31 January to 35,994 cases including 1,458 deaths by 28 February. The number of confirmed cumulative cases rose to 36,260 including 1,485 deaths by 07 March 2021 (<https://covid19.who.int/>). Globally, the number of daily new COVID-19 cases continued to rise, increasing from 102.1 million by the 31st of January to 116 million cases by 07 March 2021, which is a 13.6% increase.

The country rolled out a vaccination programme which prioritizes frontline workers after receiving 200,000 doses (to cover 100,000 people) of the Sinopharm vaccines donated by China. According to the Ministry of Health and Child Care, the country also purchased about 1.2 million doses from China, which are expected to arrive in country by early March. More pledges for donations have been received from a number of countries (e.g. Russia and India). The level 4 lockdown restrictive measures which were enacted by the government on 5 January were relaxed by the end of February. This move has resulted in the re-opening of both formal and informal businesses not categorized as essential services that had been closed since January 2021. Vulnerable urban households which tend to rely more on informal markets for both income and access to food and non-food items had been worst affected by the lockdown measures. The easing of the restrictive measures is likely to lead to improved household food security, although recovering might require a longer period.

Figure 1: Confirmed daily new cases and 7 day moving average for Zimbabwe (15 Feb 2020 to 09 March 2021)



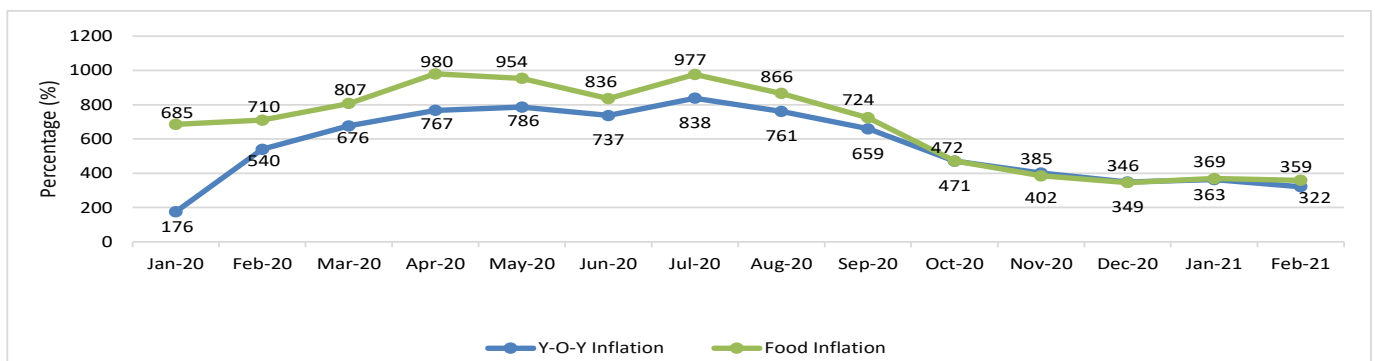
Source: WHO

2. Macro-Economic Situation Update

The country continued to record improvements in macro economic conditions, with a notable decline in annual and food inflation for 7 consecutive months i.e. since July 2020 (**Figure 2**). Annual inflation peaked in July 2020 at 838% and declined to 322% in February 2021. Food inflation which is the main driver of annual inflation also declined from 977% in July 2020 to 359% in February. The consumer price index increased by 3.45% in February compared to the previous months (<https://dataviz.vam.wfp.org/Hunger-Analytics-Hub>).

Although inflation remains high, the relative stability in the past months has been mainly attributed to a stabilized exchange rate among other measures that have been put in place by the government. Households continue to experience inflationary pressures and continue finding it difficult to plan on a month-by-month basis as prices in ZWL terms are continuously increasing, although at a lesser rate compared to same period in 2020.

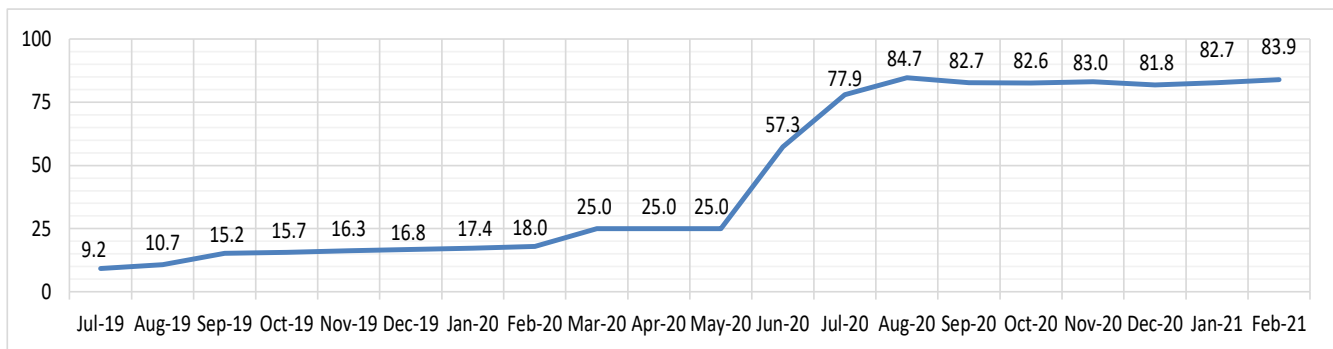
Figure 2: Zimbabwe Inflation Trends (2020 – 2021)



Source: RBZ

The official exchange rate was relatively stable over the month of February, increasing from ZWL82.68:1USD at the start of the month to ZWL83.89:1USD on 28 February 2021 (**Figure 3**).

Figure 3: RBZ Exchange Rates (1USD: ZWL)



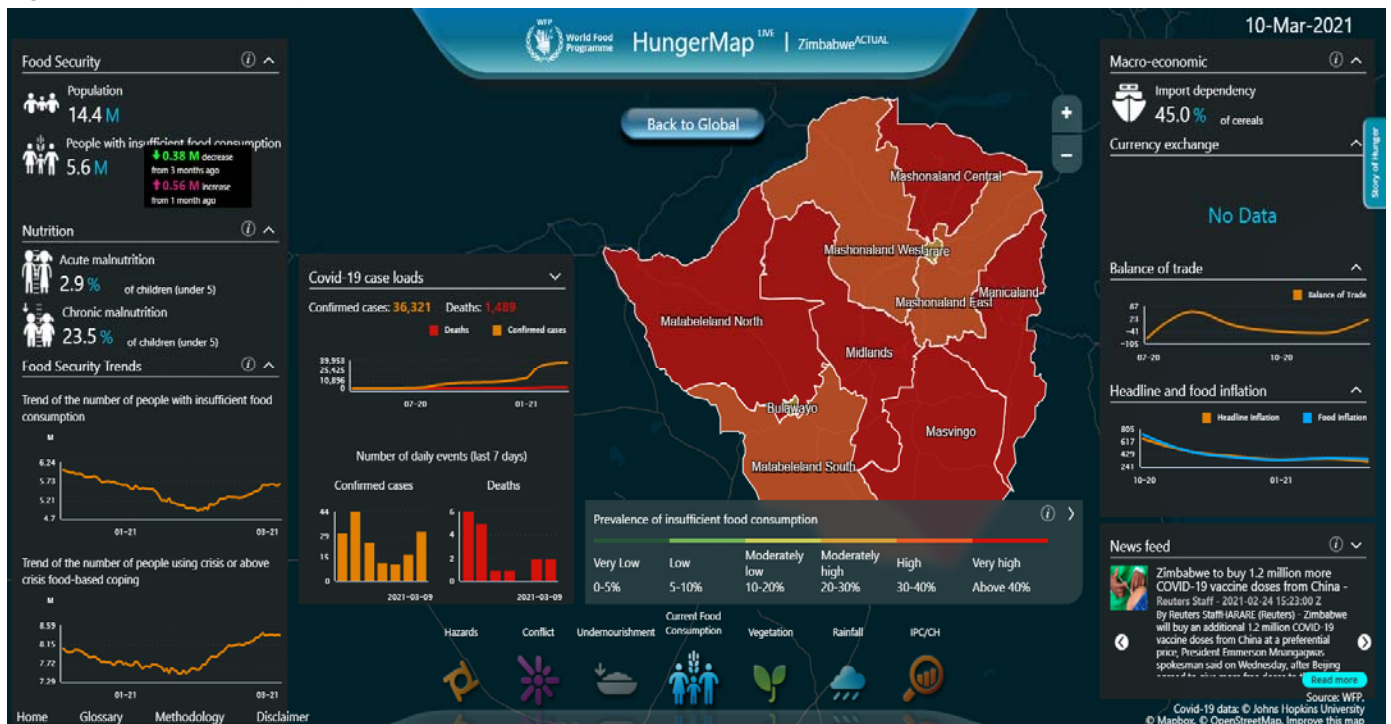
Source: RBZ, 2021

3. Food and Nutrition Security Situation

WFP continues to collect household food security monitoring information through its remote-based system, HungerMap LIVE, and the findings are summarized in a near real-time map and weekly snapshots (<https://hungermap.wfp.org/>). Data is collected from randomly selected respondents through a mobile-based survey across rural and urban areas, and is representative at Province (Admin 1) level. According to this data source, the number of people experiencing insufficient food consumption was estimated at 5.6 million during the last week of February, indicating an increase of 500,000 people over the reporting period (**figure 4**). This upward trend is what in line with what was projected to happen during the peak of the lean season by the last IPC analysis. The use of food-based coping also reportedly increased during February.

Reports from the field showed that casual labour remains the main source of income for rural households, mainly related to agriculture. However, during the month of February casual labour opportunities were limited in comparison to the previous months as the only remaining crop-related income opportunity is harvesting, has not yet commenced as it is expected to begin in April. In urban areas, households were affected by the lockdown restrictive measures and were not able to engage on their usual livelihood activities. As a result disposable income for both rural and urban households was limited leading to an increase in the number of people experiencing very high prevalence of insufficient food consumption. Prices of basic commodities have generally been increasing, a situation which has led to reduced purchasing power and a deterioration in food security at household level. Rural households were also reported to be increasingly resorting to green harvest, indigenous fruits and vegetables to meet some of their consumption needs. In some districts, households were also resorting to sharing of food assistance received from the government and partners.

Figure 4: Zimbabwe Hunger Map



Source: <https://hungermap.wfp.org/>

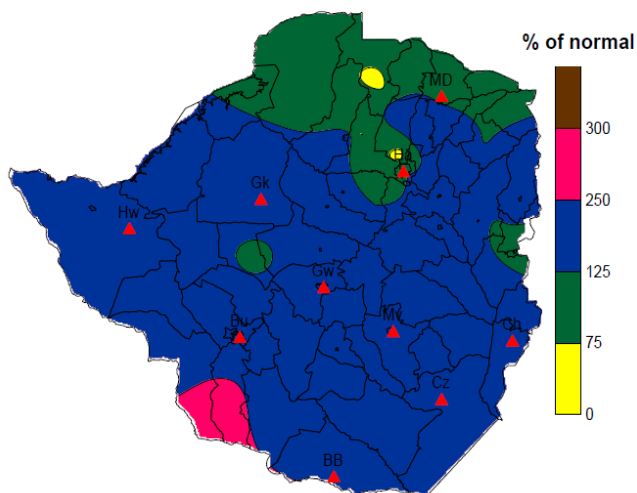
4. Rainfall Season Update

The country continued to receive above average rainfall, with most parts receiving accumulated rainfall above 125% of their normal rainfall by the 3rd of March 2021 (Figure 5). Findings from the ongoing weekly monitoring of crop and livestock conditions by WFP and partners (whilst awaiting the findings of the First Round Crop and Livestock Assessment) showed crop conditions ranging from fair to good. However, there are patches of poor crop conditions mainly in the northern districts, due to lack of adequate top dressing fertilizers and the incessant rains being received in some parts of the country. Most of the crop was reported to be at grain filling stage with harvest expected to start in April/May. These observations from the field are in line with the satellite images on crop performance as measured by the Water Retention Satisfaction Index (WRSI). WRSI is an indicator of crop performance based on the availability of water for crops during a growing season and when compared to the median year, the WRSI anomaly showed that crop condition in the northern part of the country is average while that in the southern part is very good condition (Figure 6). However, the incessant rains received led to leaching of nutrients and yellowing of some crop, a situation which might lead to potential reduction in harvest.

Fall Army worm was reported to be destroying crops in some districts across the country and this has the potential to reduce expected harvest. However, the incessant rains have also been reported to be washing the pest away, as well as causing water logging. Other districts mainly closer to national parks e.g. Beitbridge, Mbire reported crop destruction by wildlife mainly elephants.

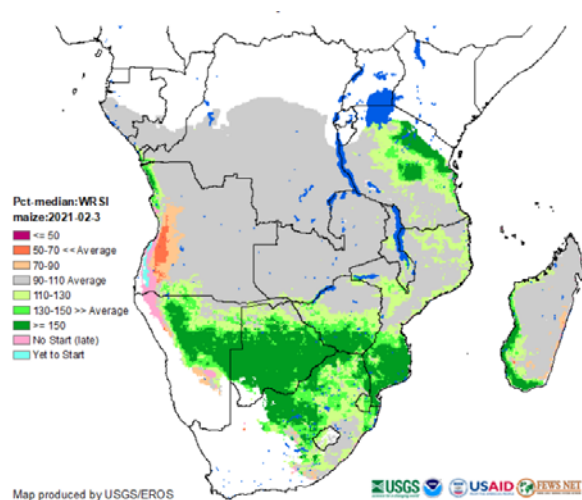
Livestock conditions were also reported to be good with an improvement in the availability and quality of pastures and water. However, some districts started reporting incidence of lumpy skin and January diseases. As a result of the improved livestock body condition, livestock prices were also reported to be improving.

Figure 5: Accumulative Rainfall percent of normal: October—3 March 2021



Source: Meteorological Department of Zimbabwe

Figure 6: Water Requirement Satisfaction Index Anomaly (Median Year): Feb 2021 Dekad 3



3. Market Performance Update

This section provides a summary of food commodity availability and prices for both rural and urban markets covering maize grain, maize meal, sugar beans and vegetable oil. This bulletin presents the national price trends over time. For a more detailed analysis of rural and urban markets separately please refer to the Monthly Market Monitoring Report for February 2021.

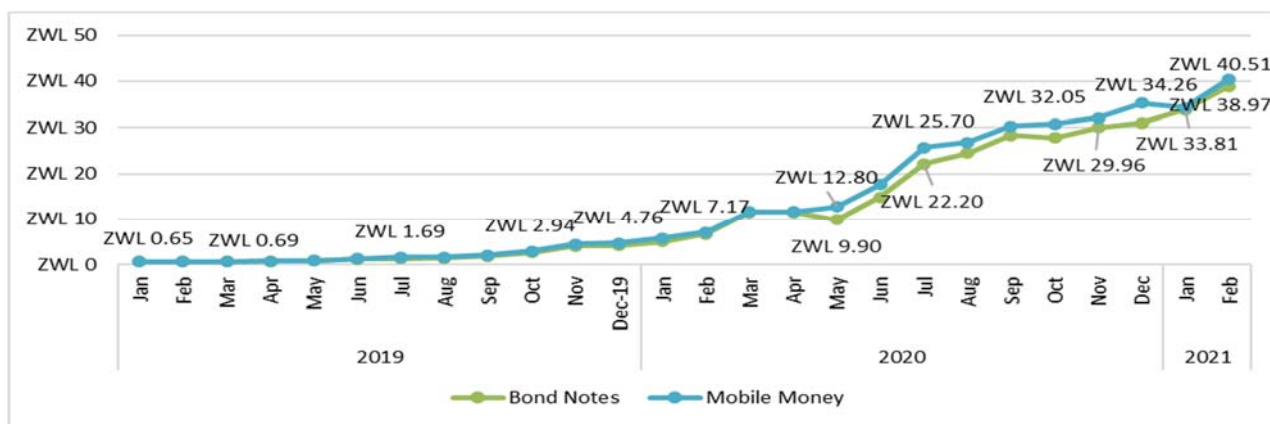
Availability of maize grain remains below typical at an average of 3%. The consistent unavailability of the commodity requires research to further understand if there are changes in the supply system of the commodity. Other WFP food basket commodities were generally available with 71% of all monitored markets reporting availability of maize meal, 69% reporting availability of sugar beans, and 91% reporting availability of vegetable oil. In ZWL terms, prices of the commodities under review increased by an average of 8% with the highest increase recorded for maize grain at an average of 15%. Prices in USD increased by an average of 5% compared to January 2021, with highest price increases reported for maize grain (9%) and sugar beans prices remained stable. On average, mobile money payments attracted a premium of 3% higher than the bond notes prices, similar to the premium reported last month.

Maize grain availability and price in ZWL terms

Maize grain availability on the formal market remained critical and below typical, estimated at 3% of the markets monitored. Compared to two years ago in February 2019 when the commodity was available in 77% of the markets, the current availability is critically poor. Out of the 16 rural district monitored over the month of February, only 6 reported availability in at least one of the markets, and 6 out of 23 urban domains monitored reported availability in at least one of the markets. The continuous unavailability of the commodity on the formal market calls for further research to further understand the dynamics of the supply systems for the commodity and the reasons behind any deviations from the norm.

The commodity was selling at an average price of ZWL38.97/kg, an increase of about 15% in comparison to ZWL33.81/kg reported in January (Figure 7). Compared to same time last year, the price increased by more than 470% from an average of ZWL6.76/kg. Mobile money payments at an average of ZWL40.51/kg attracted an average premium of 7% compared to bond notes payments.

Figure 7: Maize grain price trends

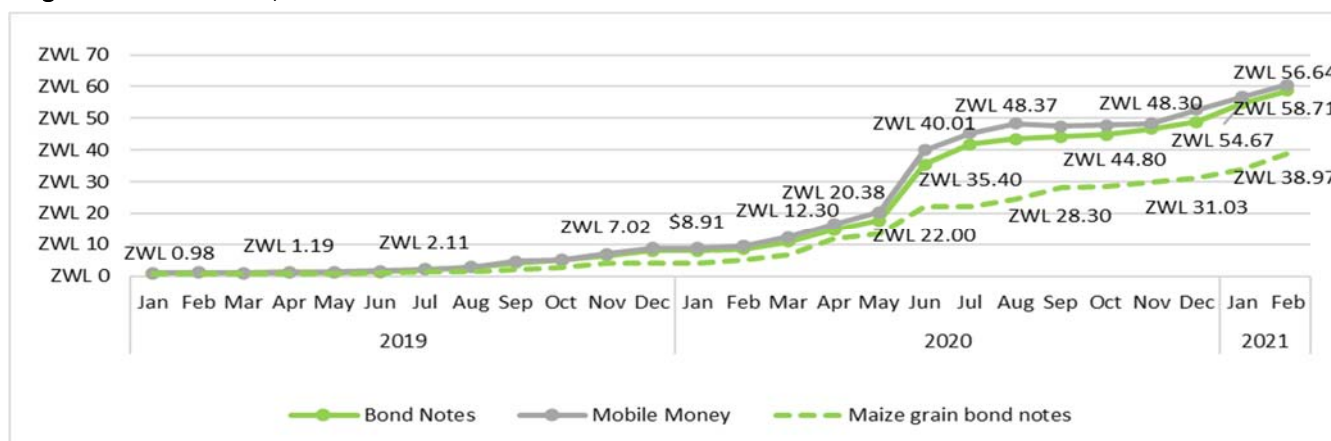


Source: Harmonized Markets Monitoring

Unrefined maize meal availability and prices in ZWL terms

Unrefined maize meal, which is a by product of maize grain and the closet substitute, was available in an average of 71% of the markets—similar to January (72%). Availability in urban markets was higher at 81% compared to 62% in rural markets. The commodity was selling at an average price of ZWL58.71/kg for bond notes an increase of 7% compared to ZWL54.64/kg reported in January. The commodity cost on average 51% higher than maize grain, hence the reason why vulnerable households prefer maize grain. In comparison to one year ago in February 2020, the price of the commodity increased by about 586% from ZWL8.56/kg and more than 5000% when compared to two years ago i.e. February 2019 when the commodity sold at an average price of ZWL1.06/kg (Figure 8). Mobile money payments were charged at an average of ZWL60.56/kg, a price 3% higher than that for bond notes.

Figure 8: Maize meal price trends

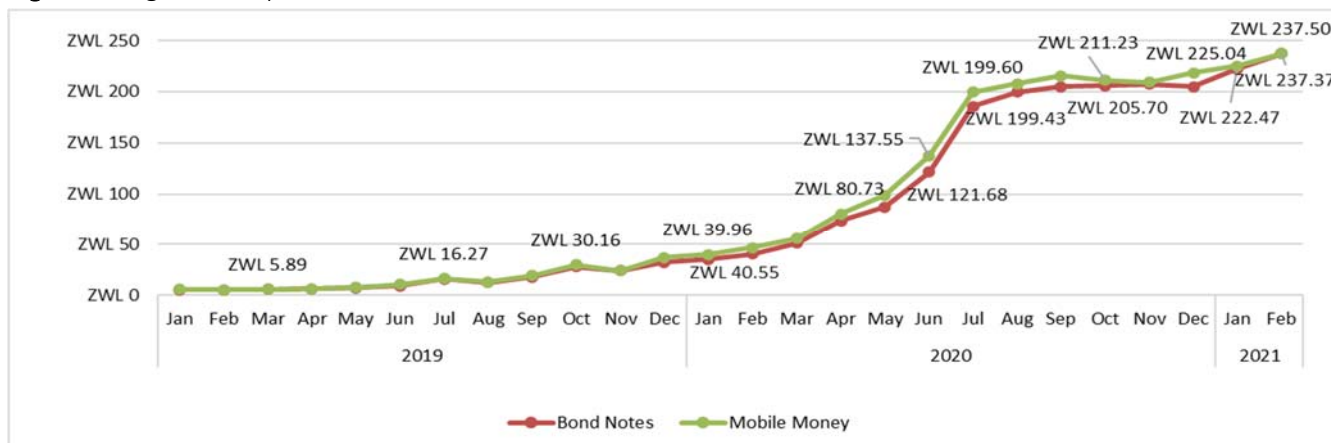


Source: Harmonized Markets Monitoring

Sugar beans availability and prices in ZWL terms

Sugar beans supply continues to be stable, with 69% of the surveyed markets reporting availability, continuing the trend from the previous two consecutive months. The commodity was selling at an average price of ZWL237.37/kg, a price which is 4% higher than ZWL222.47/kg reported in January (Figure 9). When compared to one year ago in January 2020, the price for the commodity increased by almost 485% from an average of ZWL40.55/kg and by more than 4000% when compared to two years ago i.e. February 2019. Mobile money payments at an average ZWL237.50/kg, where generally priced similar to bond notes.

Figure 9: Sugar beans price trends

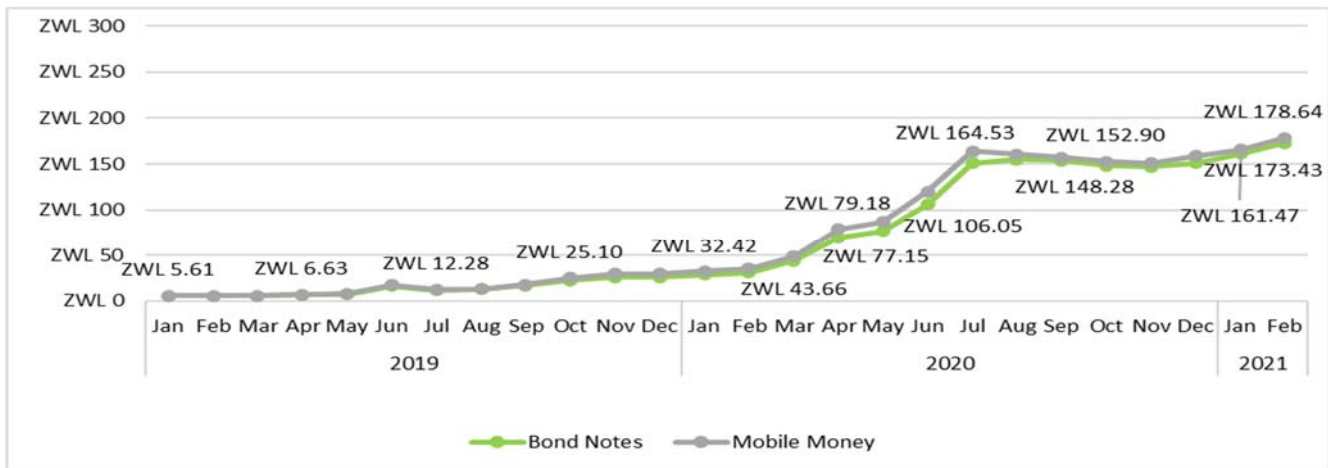


Source: Harmonized Markets Monitoring

Vegetable oil availability and prices in ZWL terms

Vegetable oil availability remained high and constant with an average of 91% of the surveyed markets reporting availability. In bond notes payments, the commodity was selling at an average price of ZWL173.43/L, an increase of 4% compared to ZWL167.48/L in January. The average price for mobile money payments was ZWL178.64/L, a price 3% higher than that of bond notes (Figure 10).

Figure 10: Vegetable oil price trends

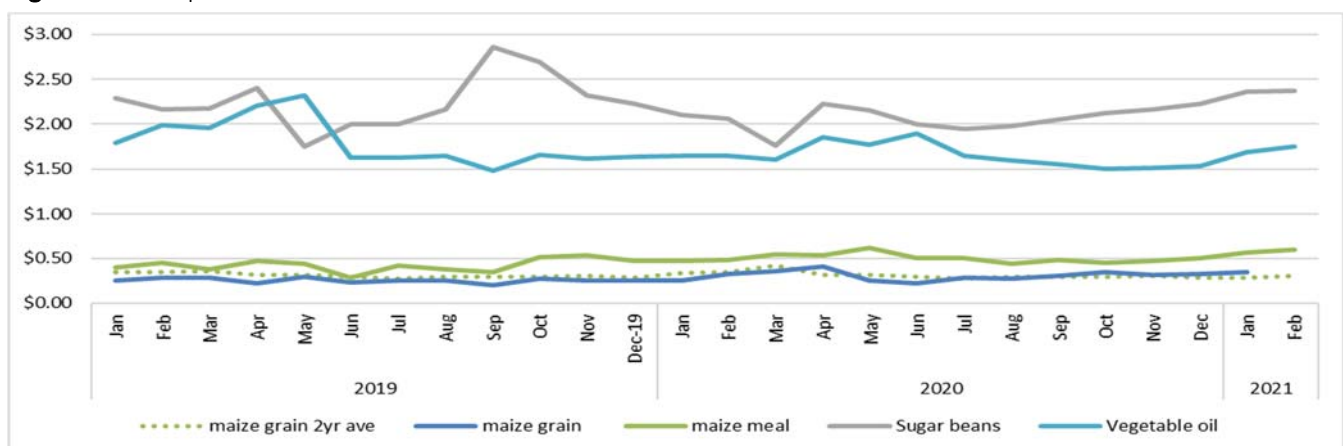


Source: Harmonized Markets Monitoring

Food Commodity Prices in Foreign Currency

The prices of the monitored food commodities in USD increased by an average of 6% in USD terms. Current maize grain price of an average of \$0.38/kg, is 9% higher than \$0.35/kg reported in January. The current price is 27% higher than the 2yr average of \$0.30/kg (Figure 11). The price of the commodity is likely to decrease with the coming harvest. Unrefined maize meal sold at an average price of \$0.59/kg, a price which is 5% higher than \$0.56/kg reported in January and 28% against the 2yr average of \$0.46/kg. Maize meal price is about 55% higher than that of maize grain. Sugar beans sold at an average USD price of \$2.37/kg similar to \$2.36/kg recorded in January and 12% higher than the 2yr average \$2.11/kg. Vegetable oil was selling at an average price of \$1.75/L, a price 4% higher than \$1.69/L reported in January 2021 and 4% lower than the 2yr average of \$1.82/L.

Figure 11: USD price trends for the food basket commodities



Source: Harmonized Markets Monitoring

4. Recommendations

Among the key recommendations emanating from the analysis above include;

- ◆ Continue monitoring the season performance in terms of rainfall, crop growth/development and livestock condition as the season progresses;
- ◆ Continue monitoring food security conditions using the HungerMap LIVE monitoring platform
- ◆ The availability of maize grain continues to be poor, therefore there is need to:
 - to monitor maize grain imports
 - continue assessing feasibility and best modality of assistance by geographical level
 - conduct a comprehensive study to understand the market linkages with source markets

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