

IMPACT OF THE UKRAINE CRISIS IN ZIMBABWE



01

Agricultural inputs

Access to agricultural inputs improved between September and October, most likely due to ongoing Government and humanitarian partners' distributions. However, the costs of inputs has more than doubled compared to last year, restricting access for the vulnerable households.

02

Food prices

The cost of living has sustained an upward trajectory between February and August and stabilized since September. When compared to pre-Ukraine crisis times (i.e. January), the cost of a basic food basket has significantly increased at an average of 10 percent.

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Food consumption

35 percent of the population was estimated to be experiencing insufficient food consumption during the last week of October, an increase of about 14 percent (700,000 people) compared to September. This is typical of the start of the lean season, yet the level remains higher than typical.

04

Fuel

The price of petrol and diesel increased by 3 and 2 percent respectively between September and October. This is driven by global increases in hydrocarbons. When compared to the pre-crisis period, the price of petrol and diesel increased by 10 and 25 percent respectively.

05

Food and migration

Pre-existing, new, and recurring food security challenges continue to destabilize poor migrant households engendering external and internal migration. Migrant-sending and receiving areas coincide with food-insecure areas in Zimbabwe.

06

Migration flows

Since the impacts of the Ukraine crisis started to be felt, movements in and out of Zimbabwe increased by 1 percent. 69 percent of the migrants traveling to South Africa plan to stay beyond six months, despite the eventual cancellation of Zimbabwean Exemption Permits mid-2023.



Introduction

Since the start of the Ukraine-Russia conflict, its impacts have been felt worldwide, including in Zimbabwe, where the impact has been evidenced through price spikes, supply chain disruptions and a general deterioration of macro-economic and living conditions, especially for the vulnerable sections of the society, including migrant households.

The Ukraine crisis is happening at a time when Zimbabwe is struggling to recover from the cumulative effects of the Coronavirus Disease 2019 (COVID-19) pandemic and against the backdrop of a reduced agricultural maize harvest from the 2021/22 season. This is threatening development gains and hindering progress towards the Sustainable Development Goals (SDGs).

In recent reports, the United Nations World Food Programme (WFP) and the United Nations Development Programme (UNDP) noted that the conflict has had direct effects on increasing food and fuel prices and disrupting trade, which has led to fiscal tightening and a widening of inequalities and governance issues. WFP also noted that the uncertainty and halting to the Black Sea Grain initiative has had an effect on global wheat prices, which could in turn affect other grain prices if not resolved.

With support from the Sustainable Development Goals (SDG) Fund, WFP, IOM and FAO jointly examine and monitor the impact of the Ukraine-Russia conflict on rising food prices, food security, access to essential needs and agricultural inputs, and migration patterns in Zimbabwe.

Non-food commodities

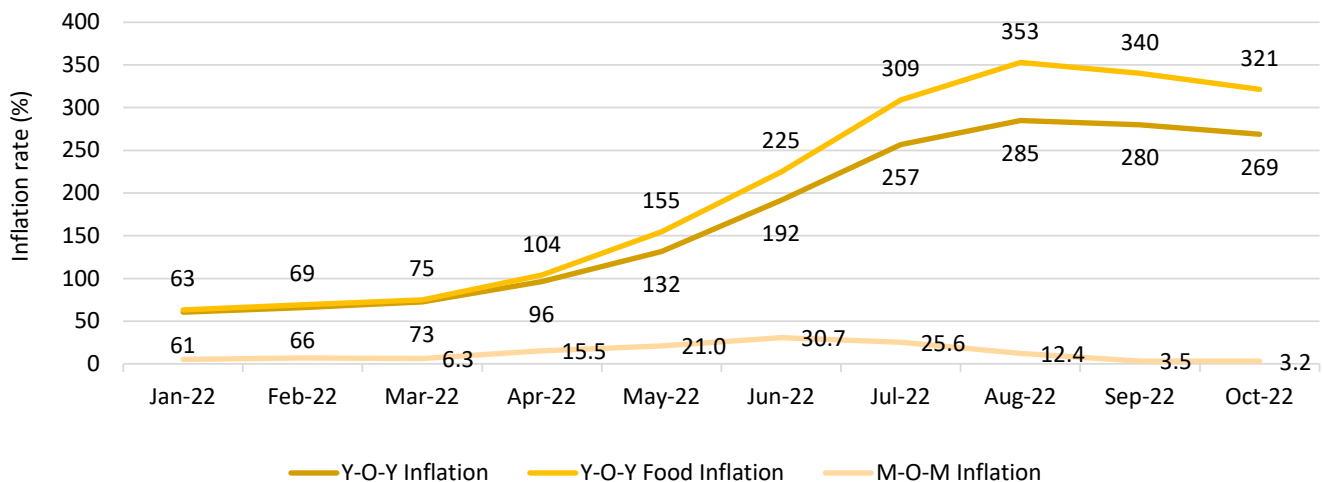
Impacts of the Ukraine crisis in Zimbabwe

Household access to agricultural inputs improved following widescale distribution of inputs by Government and partners. Following several months of steady reduction in the cost of fuel from its peak in June, the price of petrol and diesel marginally increased in October, reflecting global price movements and remains well above pre-Ukraine crisis levels. Meanwhile, headline inflation continued to decelerate but remains highest within the SADC region and is the highest in the world.

The country has been operating in a financial inflationary environment with the prices of goods and services increasing by more than 500 percent in ZWL terms since the start of the year. Year on year inflation increased from 61 percent in January 2022 to 285 percent in August before decreasing marginally to 269 percent in October 2022. Food inflation, which remains the main driver of inflation in the country, also followed a similar trend rising from 63 percent in January 2022 to 353 percent in August 2022 and decreased to 321 percent in October 2022.

High inflation and related price increases continue to erode the purchasing power of vulnerable urban households who rely on the market for essential needs face challenges in meeting their essential needs without external assistance. These families' vulnerability may continue to exacerbate and some may resort to migration as a coping mechanism.

Inflation trends. January-October 2022



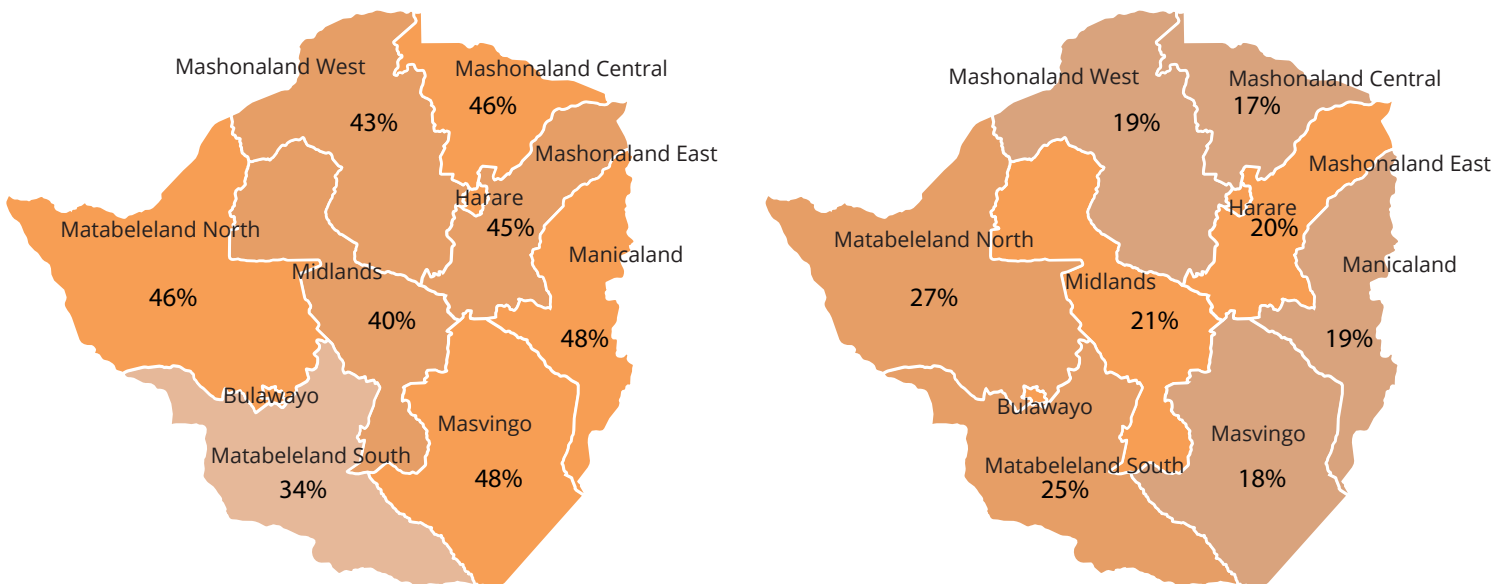


Agricultural inputs

Household access to inputs has improved. The proportion of households facing input shortages decreased from a maximum of 48 percent in Manicaland reported in September to a maximum of 27 percent in October in Matabeleland North. This improvement in access could be attributed to the scale up in the distribution of inputs by the Government and the NGOs as well as improved supply on the market.

According to Zimbabwe Fertiliser Manufacturer Association (ZFMA), the country had already prepositioned adequate fertilisers required for the 2022/23 summer cropping season hence the impact of the Ukraine crisis is estimated minimal for the ongoing harvest. The 30 percent who are still facing challenges could be partially attributed to the cost of inputs, which has more than doubled in ZWL terms compared to same time last year. However, depending on global price and availability trends in the coming months, there may be need to also preposition fertilisers for the winter cropping season earlier than usual to avoid potential shortages.

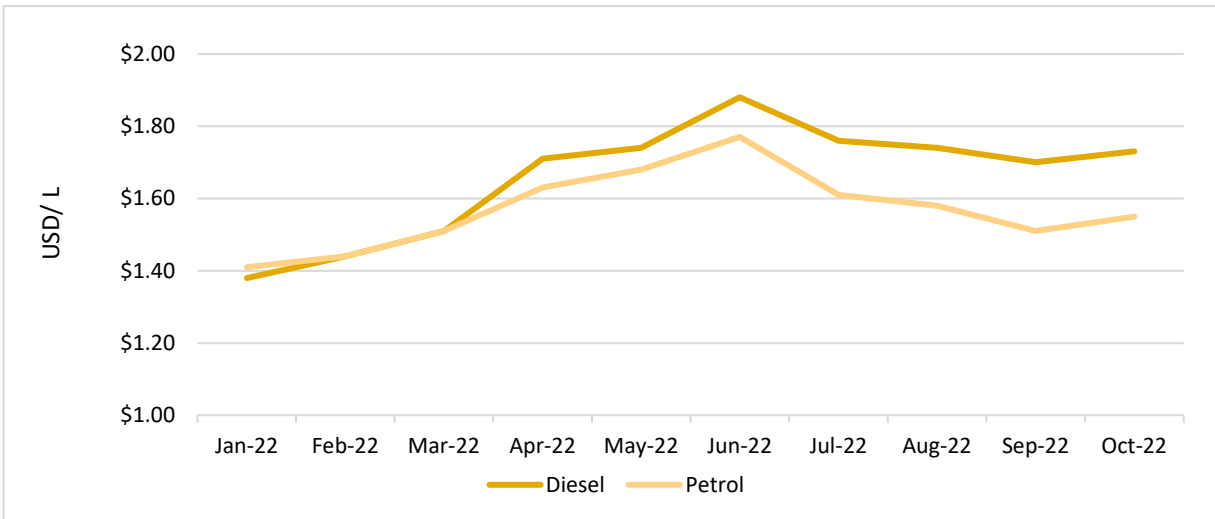
Households facing food shortages - September to October 2022



Fuel

The price of petrol increased by 3 percent from USD 1.51/L in September to USD 1.55/L in October 2022, while that of diesel increased by 2 percent from USD 1.70/L to USD 1.73/L over the same period. The increase in the price of fuel between September and October was attributed by the Zimbabwe Energy Regulatory Authority to an increase on the global market. When compared to the pre-crisis period i.e. in January 2022, the price of petrol increased by 10 percent while that of diesel increased by 25 percent.

Fuel prices January-October 2022



Food security

Impacts of the Ukraine crisis in Zimbabwe

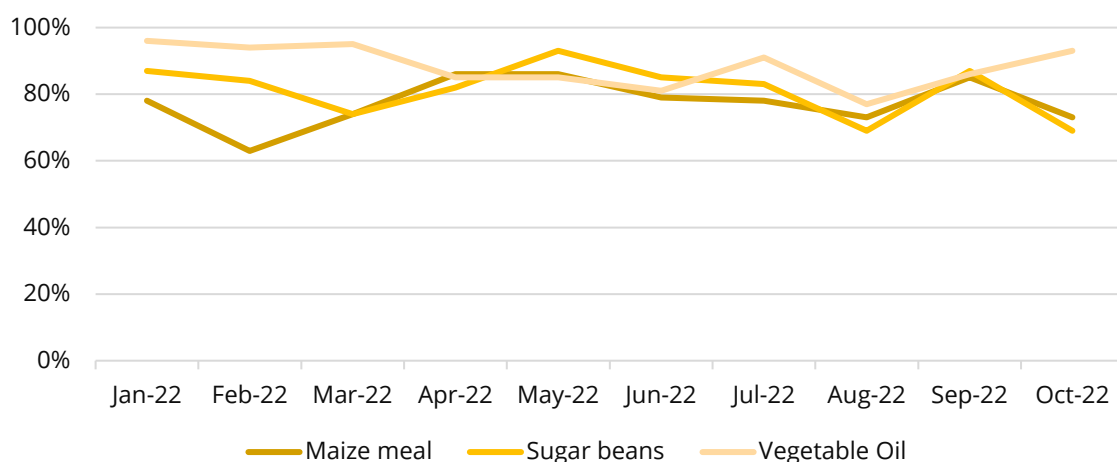
The estimated number of people experiencing inadequate food consumption and resorting to consumption-based coping continues to rise, which is typical of the lean season as households increasingly rely on markets to source most of their food. Meanwhile, the cost of some basic food basket commodities (maize meal and sugar beans) increased in October, and the overall cost of the basket is 10 percent higher than a year ago.

Availability

In rural Zimbabwe, October typically marks the start of the lean season where most households from the deficit producing areas increasingly rely on the market for food, after exhausting stocks from own production. The availability of commodities usually decreases as a result of an increase in demand.

Maize meal availability decreased by 12 points from 85 percent in September to 73 percent in October; similarly sugar beans availability also decreased by 18 percentage points from 87 percent to 69 percent. However, availability of vegetable oil continued to improve, increasing by 7 points from 86 percent in September to 93 percent in October 2022, continuing a trend since June 2022 that is in line with increased supply of the commodity on the global market as well as the positive impacts of the waiver on import duty for selected food commodities including vegetable oil.

Availability of basic food commodities January-October 2022



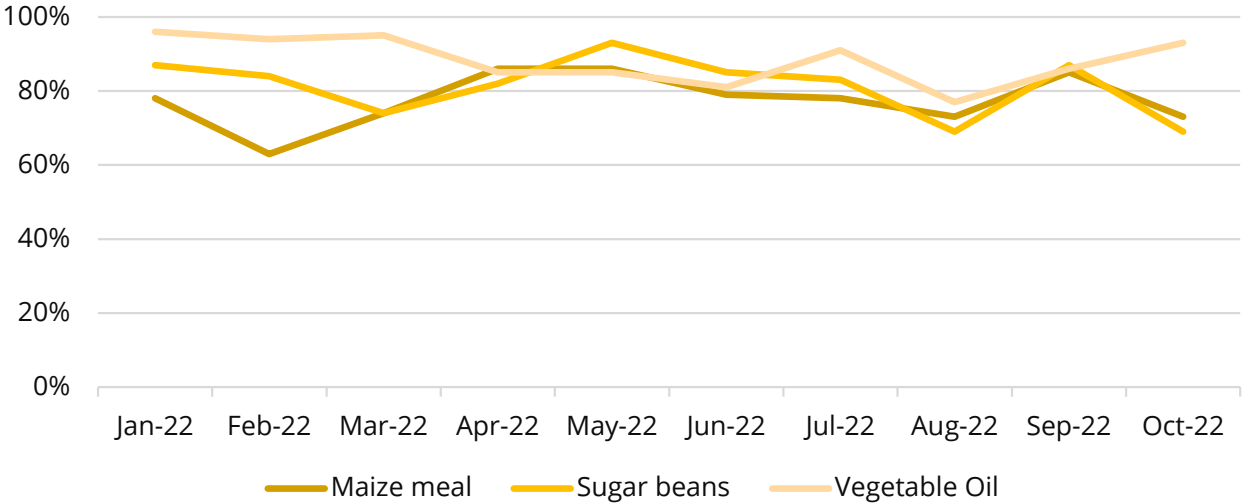
Cost of a basic food basket

The price of basic food basket commodities was generally stable in October when compared to September. However, when compared to pre-Ukraine crisis times (i.e. January), the increase is significant at an average of 10 percent.

The price of maize grain decreased by an average of 5 percent from an average of USD0.31/kg in September to USD0.29/kg in October 2022. This decrease in the price of the commodity in USD terms could be partially explained by the monetary policy measures being implemented by the Government which has brought some relief to inflationary and forex pressures.

Maize grain price increased by 9 percent between January and October 2022 from an average of USD0.27/kg. The price of maize meal increased by 10 percent when compared to September from USD0.48/kg to USD0.52/kg and by 25 percent when compared to January 2022. The price of sugar beans increased by 8 percent while that of vegetable oil was stable in comparison to September 2022. The price of sugar beans increased by 8 percent when compared to September and decreased by 8 percent when compared to January 2022. Vegetable oil price was stable compared to September price and increased by 12 percent when compared to January 2022.

Cost of basic foods January-October 2022



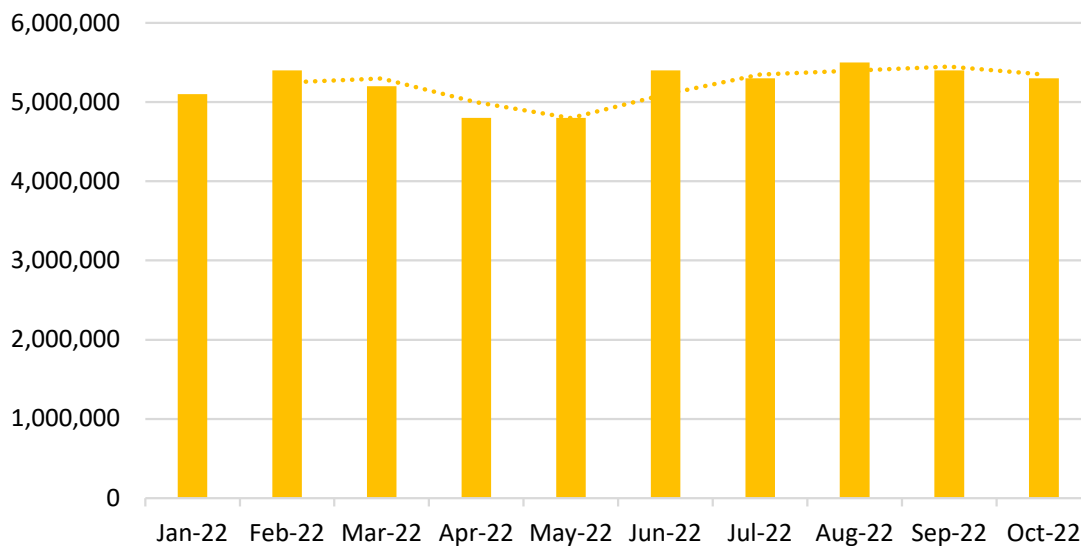
The cost of basic food basket commodities is on average 6 percent higher than last year and the two-year average. The increase in price could be attributed to a number of factors including the poor performance of the previous season, local inflation and fuel price increase which is directly linked to the Ukraine crisis.

Food consumption

About 5.8 million people (35 percent of the population) were estimated to be experiencing insufficient food consumption during the last week of October, an increase of about 14 percent (700,000 people) compared to September 2022.

An increase in the prevalence of food insecurity is typical of the start of the lean season, when households increasingly rely on the market for food, although the level remains higher than typical. The situation could be exacerbated by the general low-income levels mainly for the vulnerable leading to challenges in meeting adequate food needs without external support. The highest prevalence of insufficient consumption was reported in Matabeleland North (53 percent from 39 percent during the previous month) followed by Mashonaland West (40 percent from 25 percent).

Population with insufficient food consumption January-October 2022



Remittances

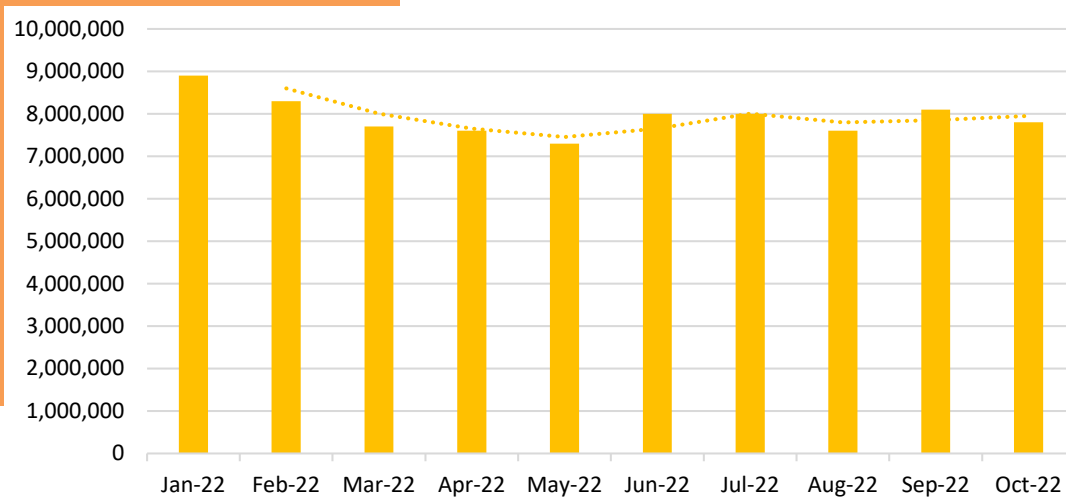
16 percent of households reported receiving remittances in October, similar to 17 percent in September, and an increase from 12 percent in August 2022. Of those that received remittances in October, 68 percent used the money mainly for food, followed by education (20 percent), health (8 percent) and shelter (4 percent), similar to September.

Instead, only 7 percent of migrant households reported having remittances among their types of income. Of these (82 percent) declared that they use the remittances mainly to access food and essential needs. This shows the important role and positive impact of remittances on helping households to improve their food security status and access to essential needs, which they may not otherwise be able to.

Food-based coping

7.6 million people were estimated to be resorting to food-based coping during the last week of October. Matabeleland North (59 percent), Manicaland (56 percent), Masvingo (52 percent) and Midlands (49 percent) provinces reported the highest prevalence and some of these provinces have consistently reported high coping for over three consecutive months, indicating an early start of the lean season. Increased coping is also typical during the lean season as households experience an increase in food shortages, however the current levels are elevated.

Population adopting 'crisis and above' food-based coping January-October 2022



Essential needs and migration

Impacts of the Ukraine crisis in Zimbabwe

Migrant sending and receiving areas continue to coincide with the food insecure area in Zimbabwe. The provinces facing more challenges related to food security in October were Matabeleland South and Bulawayo with a high percentage of households in 'moderate' or 'severe' food deprivation. Short and long-term migration are adaptation strategies to meet basic needs that, with remittances received, contribute to limit the number of households in moderate and severe hunger.

Migrant profile

In October, 44,995 movements were observed. This is 5 percent less than the previous month. Of these movements, 60 percent were inflows whilst 40 percent were outflows. 54 percent of the migrants were males, 44 percent were females, less of 1 percent were boys and less of 1 percent were girls (aged between 0 and 17). 83 percent of all migrants were aged between 18 and 45, and a total of 83 individuals were persons with disabilities.

The highest migrant-sending provinces were Matabeleland South (Beitbridge 41 percent), Harare (12 percent), Masvingo (Masvingo 8 percent and Chiredzi 8 percent) and Manicaland (Chipingwe 4 percent). The highest migrant-receiving provinces were Harare (22 percent), Matabeleland South (Beitbridge 20 percent), Bulawayo (8 percent) and Mashonaland West (Hurungwe 7 percent). The highest number of migrant-receiving rural area was Matabeleland South (Beitbridge) and the highest migrant-receiving urban areas were Harare and Bulawayo.

Of the migrant out-flows observed, 89 percent highlighted that they were not employed and were looking for employment opportunities in their destination countries. 5 percent of respondents noted that they were self-employed running either small to medium-scale enterprises or were cross-border traders. Unemployment is migration push factors for family members in productive age.

Among the 1,609 interviewed migrants coming from South Africa, 13 percent were in possession of the Zimbabwe Exemption Permit (ZEP), an increase from September (4 percent). This can be attributed to ZEP holders' families coming back from South Africa before the ZEP expires. 40 percent of the ZEP holders reported Bulawayo, 34 percent Masvingo, and 26 percent Matabeleland South as their place of origin. As place of residence, 48 percent reported Gauteng province, 19 percent reported Western Cape, 18

percent reported Limpopo Province and the remaining 21 percent live dispersed across other provinces. The provinces of residence of ZEP holders in South Africa, coincide with the provinces reported during the month of September.

69 percent of the migrants traveling to South Africa were planning to stay for a period of six months or more, even with the knowledge of the eventual cancellation of ZEP in June 2023 risking to be deported after this date.

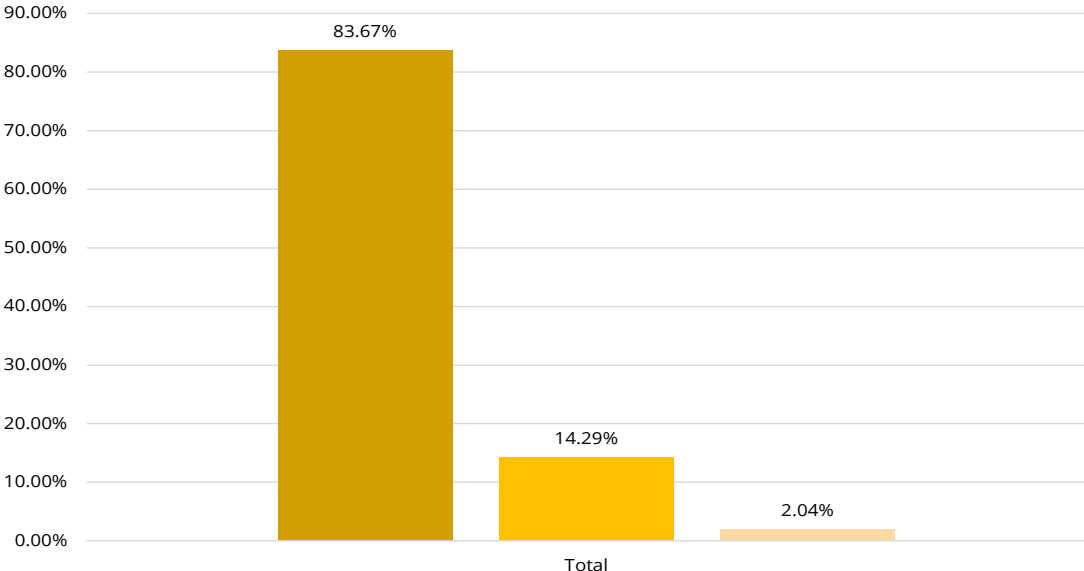
Shocks and migration

Migrant sending and receiving areas continue to coincide with the food insecure area in Zimbabwe. According to the Household Hunger Scale indicator in October, more than 16 percent of the migrants' households were in moderate or severe hunger before the family member decided to migrate.

The provinces facing more challenges related to food security were Matabeleland South (71 percent) and Bulawayo (12 percent) with a higher percentage of households in 'moderate' or 'severe' food deprivation, similar to September. This indicates that challenges related to food access are one of the driving factors for migration in both rural and urban areas of Zimbabwe.

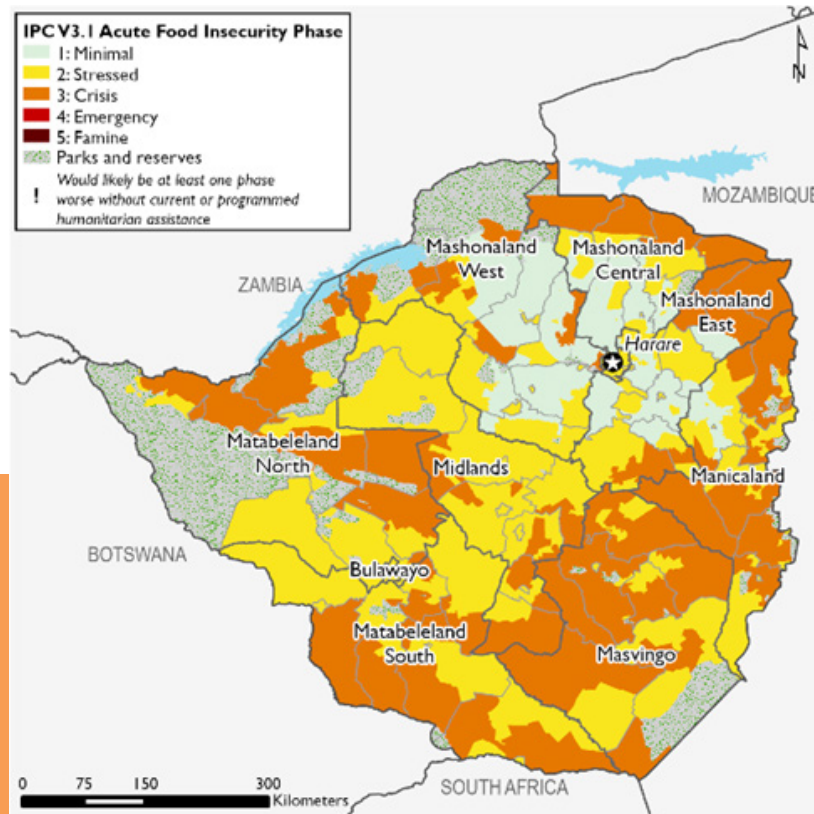
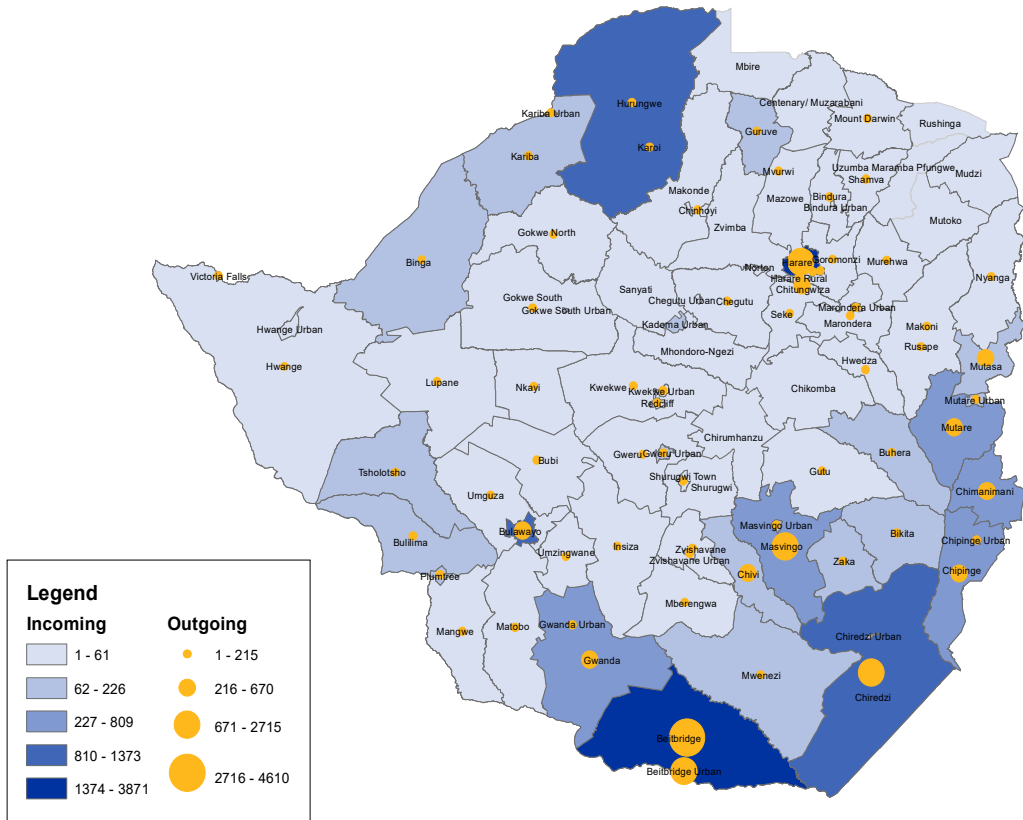
30 percent of interviewed migrant households reported to have suffered a shock in the last 30 days before migrating. The most common shocks reported by migrants were loss source of income (34 percent), family health issues (26 percent), death of breadwinner (17 percent) and increase of prices (12 percent), similar to September. Among migrant households that faced a shock linked to price increases, 81 percent perceived food as the most increased then medication/health, cooking oil and fuel with 8 percent, 6 percent and 3 percent respectively. Those perceptions echo what was reported in September.

Household Hunger Scale



Food insecurity and migration nexus

IOM Flow Monitoring Survey and Fewsnet Food Security Outcomes - September 2022



Coping strategies

The majority of interviewed migrants (94 percent) declared adopting coping strategies to protect their livelihoods face to the shocks. 2 percent of them adopted 'emergency' coping strategies, 10 percent 'crisis' coping strategies and 82 percent 'stress' coping strategies.

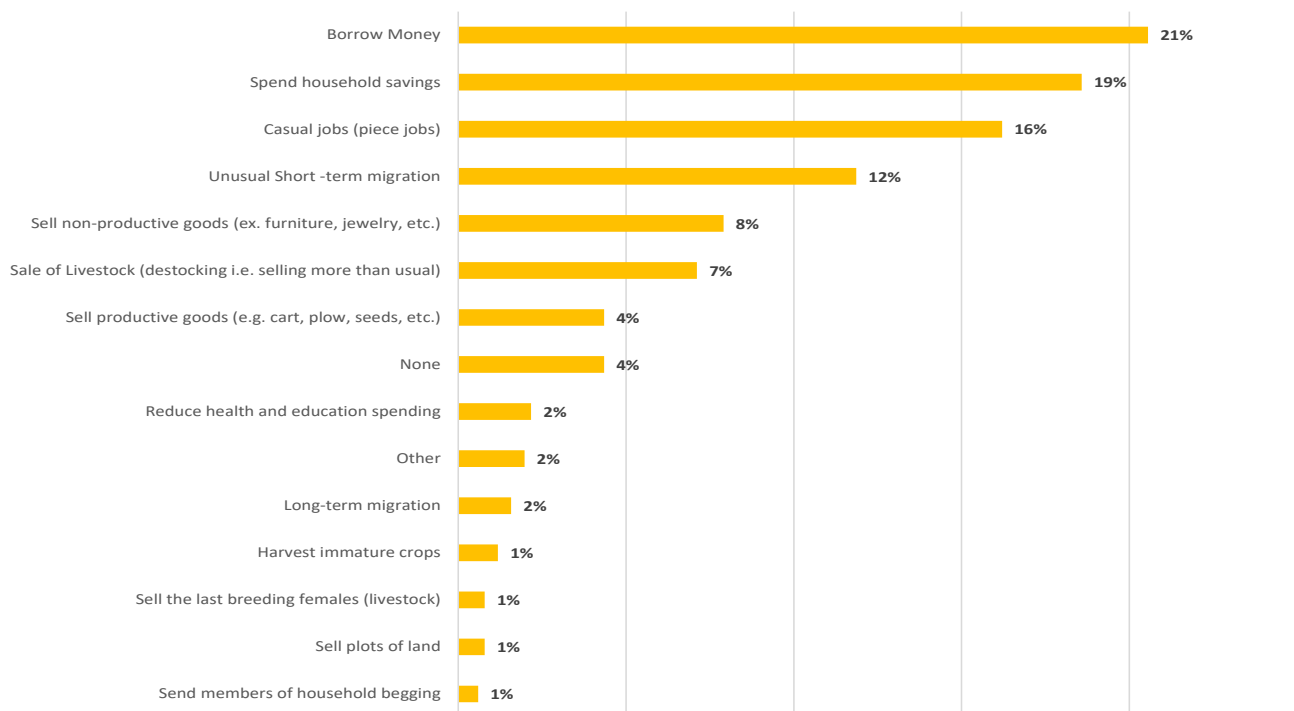
The most commonly used copying strategies used by migrant households in October were borrowing money (21 percent), spending households' savings (19 percent), casual jobs (16 percent), unusual short-term migration (12 percent), mirroring what was observed in September.

Furthermore, as coping strategy to shocks related to the increase of prices, the migrants travelling for cross-border trade, used to buy, in the neighboring countries, clothes (41 percent), food (27 percent), fuel (6 percent) and beverage (4 percent) to earn a living, same as in September. Other important goods imported during the month of October, that were not imported in September, include agricultural inputs (3 percent).

Short-term and long-term migration are adaptation strategies, for poor families, to meet their basic needs. The use of copying strategies and the remittances received contribute to limit the number of households in moderate and severe hunger in the rural areas as well as to the survival of urban dwellers.

Support for vulnerable, migrant, and mobile population must shift from short-term crisis response to longer-term resilience building through job creation, livelihoods development and broadening the range of social protection measures.

Coping strategies



Methodology

This analysis is possible thanks to the UN Sustainable Development Goals (SDG) Fund. Analysis is based on data collected through existing monitoring systems from WFP, IOM and FAO. It assesses the status of key indicators from the pre-war period versus post-war period in order to isolate the impact of the conflict. The primary level of analysis is provincial.

WFP HungerMap LIVE is a near real-time remote monitoring platform that tracks the latest food security trends. The platform combines key metrics from various data sources – such as food security information, weather, population size, hazards, nutrition information and macro-economic data – to help assess and monitor the magnitude and severity of food insecurity in near real-time. The main advantage of this approach is that data is available more frequently and processed daily through automated statistical engines. Daily updates are then produced showing a snapshot of the current food security situation over the past month. The resulting analysis is displayed on an interactive map that helps key decision makers and the broader humanitarian community to make more informed and timely decisions relating to food security. Through the **Harmonized Markets Monitoring initiative**, WFP also monitors the availability and price of basic food basket and essential non-food commodities in partnership with the members of the Zimbabwe National Cash Working Group, which includes the Government and NGOs. Data collection is conducted on a biweekly basis in rural and urban markets for both formal and open markets.

Flow Monitoring is IOM's data collection activity which seeks to gather key information on mobility and migrant profiles. It begins by identifying zones in which large mobility flows occur and highlighting the characteristics and journeys of travellers in these zones. **Displacement Tracking Matrix (DTM)** teams, with the support of local authorities and partners, identify strategic points of transit, where Flow Monitoring Points (FMPs) are set up. At each FMP, DTM conducts two main activities: Flow Monitoring Registry (FMR) and Flow Monitoring Surveys (FMS). key informants, including staff working at transit stations, border patrol officers, local authorities, bus or taxi drivers and travellers themselves. The FMR gathers data on the number of travellers crossing FMPs, as well as the provenance, next destination, vulnerabilities, challenges, reasons and means of transport of travellers. At each FMP, data is collected by a team of enumerators. Data collection is carried out daily, between 8:00 am and 5:00 pm. a mobile data collection form to ensure data integrity and quality. This report is an overview of the data collected from 1 August to 30 September 2022. The data are not representative of all migration flows in the border area, and, because they only Temporal coverage of the data collection exercises is also limited to a specific time window. While data is collected daily, Flow Monitoring activities do not capture all flows transiting through FMPs. Data on vulnerability is based on direct observation and self-reporting. Therefore, the findings should be understood as mainly indicative.

FAO **Data in Emergencies (DIEM)** collects data on shocks and livelihoods in countries prone to multiple shocks including Zimbabwe. The DIEM collects data on livelihoods, shocks, incomes, crop and livestock production as well as household needs. DIEM aims to inform decision-making by providing regularly updated information on how different shocks are affecting the livelihoods and food security of agricultural populations. Primary data is collected from households and key informants through phone surveys.