

Food Security and Markets Monitoring Report

Situation Update

According to WFP HungerMap LIVE Manicaland and Masvingo provinces food security situation is in the high risk and stable category with average prevalence of insufficient consumption and crisis and above coping of greater than 40%. However, no significant deterioration has been observed. The rest of the provinces which include urban provinces were moderate and stable (i.e. less than 40% prevalence).

Following increases in the parallel and official market exchange rates, the month saw some basic food commodity price hikes. Following nearly two months of decrease and relative stability, the official and parallel market exchange rates and commodity prices have risen. Typically, staple grain prices rise as demand rises throughout the lean season, particularly in deficit-producing areas.

In preparation for the projected below-average rainy season in the 2023/24 season, the government has put in place crop and livestock mitigation measures. This include the input support targeting strategies and processes for the 2023/24 season, adapted to the different Zimbabwe agroclimatic zones.



Highlights



Zimbabwe's annual inflation rate fell to 18.4% in September 2023 from 77.2% in August. *(NB: the statistics agency changed its methodology to reflect the increased use of US dollars in the economy).*



According to WFP's HungerMap LIVE, the number of people facing insufficient food consumption is similar to the previous month and the number of those employing 'crisis and above' food-based coping strategies increased.



According to FEWSNET, IPC Stressed (IPC Phase 2) outcomes, with the emergence of Crisis (IPC Phase 3) outcomes, are expected as the 2023/24 lean season begins in the deficit producing areas especially in the southern parts of the country.



The September 2023 SARCOF, predicted a drier than normal Oct-Dec 2023 period across the country and normal to above normal rainfall in the Jan- Mar 2024 period save for some South- Western parts of the country.



The cost of the monitored minimum expenditure food basket (MEB) was stable in ZWL and USD terms in rural markets and increased in ZWL terms in urban markets. In urban areas the cost of MEB remained stable.



The price of fuel remained stable in USD and ZWL terms save for a noted slight increase in the USD price for diesel. Meanwhile prices of hygiene items reduced in both ZWL and USD terms.



Food security situation

According to WFP’s HungerMap LIVE monitoring platform, which collects data from rural and urban households through mobile phone surveys on several indicators including food consumption patterns and coping strategies - the number of people facing insufficient food consumption is estimated at 4.1 million in the first week of October similar to the first weeks of September and July. The number of people resorting to ‘crisis and above’ food-based coping strategies is on the increase as the lean season is fast approaching—rising from 5.9 million in July to 6.5 million during the first week of October 2023.

HungerMap LIVE divides provinces into various tiers (Figure 3) of risk based on the prevalence of insufficient food consumption and the prevalence of households utilizing crisis or above food-based coping strategies, as well as the change in these prevalence rates over the last 90 days (i.e. July to October 2023). The current Manicaland and Masvingo province food security situation is in the high risk and stable category (red colour on Figure 3) as the average prevalence of the above two indicators is more than 40%. However, no significant deterioration has been observed for the average of both indicators (Figure 3). In the rest of the provinces which include urban provinces the food security risk has been moderate and stable (i.e. less than 40% prevalence) over the 90 days period (Figure 3).

According to FEWSNET the bulk of households in the northern productive resettlement areas are expected to maintain Minimal (IPC Phase 1) acute food insecurity outcomes through the January 2024 projection period as they continue to access food from their 2023 harvested stocks and income from crop sales including other typical food sources. However, in most communal parts of these areas, and other areas of the country Stressed (IPC Phase 2) outcomes are expected due to declining own-produced food stocks and limited access to income and high non-food prices. In most deficit-producing areas in the south and other areas, household stocks from the 2023 harvest are either declining or have been exhausted, leaving them being depended on market purchases for food. This is resulting in Stressed (IPC Phase 2) outcomes, with the emergence of Crisis (IPC Phase 3) outcomes as the 2023/24 lean season begins.

Figure 1: Consumption, food-based coping, June— Sep

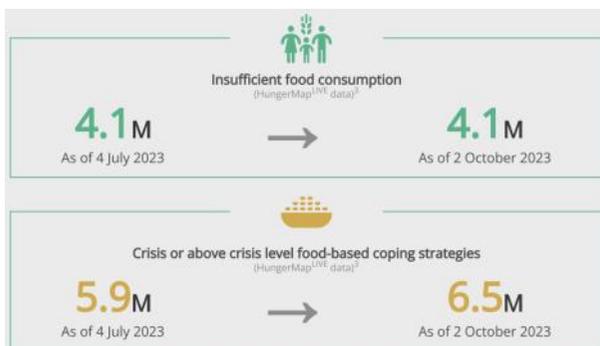
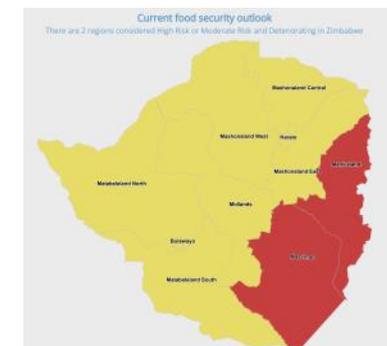


Figure 2: Prevalence of insufficient food consumption, June — September 2023



Figure 3: Current Food Security Outlook



Tier 1: High Risk and Deteriorating. Regions with more than 40% prevalence for the average of the above two indicators AND significant deterioration observed for the average of both indicators from 90 days ago.

Tier 2: High Risk and Stable. Regions with more than 40% prevalence for the average of the above two indicators AND no significant deterioration observed for the average of both indicators from 90 days ago.

Tier 3: Moderate Risk and Deteriorating. Regions with less than 40% prevalence for the average of the above two indicators AND significant deterioration observed for the average of both indicators from 90 days ago.

Tier 4: Moderate Risk and Stable. Regions with less than 40% prevalence for the average of the above two indicators AND no significant deterioration observed for the average of both indicators from 90 days ago.



Seasonal Monitoring: Rainfall, Crops, Livestock and Livelihoods

Figure 4: Rainfall outlook for the OND 2023 period

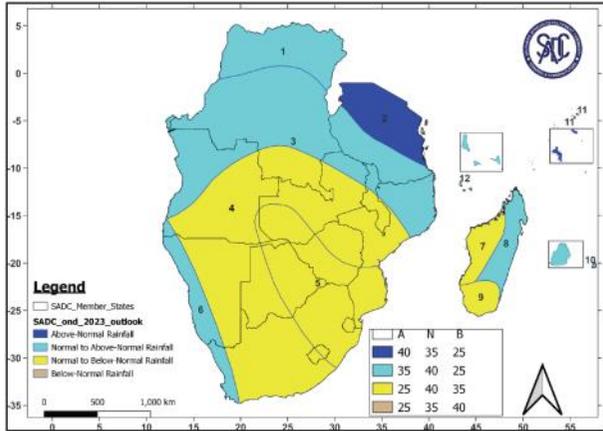
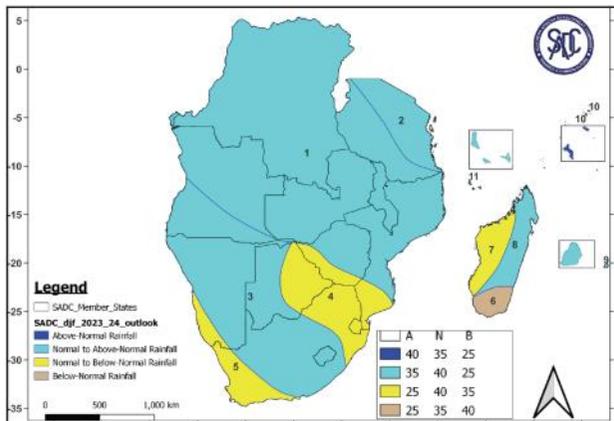


Figure 5: Rainfall outlook for the JFM 2023 period



According to the 27th Southern Africa Regional climate outlook forum (SARCOF- 27) the bulk of the SADC region is likely to receive normal to below-normal rainfall for most of the October to December (OND) 2023 period (Figure 4). The portion coloured yellow on the map which includes Zimbabwe represents highest probability for normal rainfall but with a tendency to below-normal rainfall. Such probability raises alertness for possible drier than normal conditions. The SARCOF also predicted normal to above-normal rainfall for most of the period January to March (JFM) 2024 period (Figure 5). This also includes most parts of Zimbabwe. The cyan colour indicates the highest probability of normal rainfall, but with a tendency to above-normal rainfall. However, during this period some South- Western parts of Zimbabwe will remain in the yellow category (normal to below-normal). Some parts of Northern South Africa, Eastern Botswana, Southern Mozambique and Swaziland are likely to remain in the normal to below-normal rainfall category in the JFM period.

According to the latest FEWSNET report, as the 2023–2024 rainy season gets underway, poor households will probably start getting income from agricultural casual labor opportunities including land preparation and planting. However, according to the same report and WFP internal monitoring the onset of an EL Nino event and the subsequent prediction of below-average rainfall, might restrict income opportunities, as better-off households are likely to reduce area planted to offset expected losses. Given that scenario, poor households, in response, are likely to resort to negative coping strategies in an attempt to increase alternative sources of income through selling productive assets and engaging in illegal activities.

WFP has set out El Nino mitigation response plan which is a portfolio of high priority and layered interventions aimed at mitigating the effects of the possible drier than normal rainfall season. These interventions include climate services, provision of drought tolerant seeds and inputs, solarized boreholes, Integrated livelihood-based assets to active FFA sites and SLP dissemination and integration. These efforts are complementing government actions of awareness raising and preparing communities for the worst case scenario. The Ministry of Lands, Agriculture, Fisheries, Water and Rural Development is targeting and distributing crop inputs to 3.5 million households in the country based on Agro-climatic regions. The government is also targeting about 200, 000 participants under the livestock survival strategy to cushion them against the possible impacts of the El Nino. FAO will be distributing drought tolerant seed varieties and associated inputs and will implement crop and livestock monitoring among other activities in Matabeleland South whilst the IFRC has activated its Early Action Protocol (EAP) for Drought which will implement early warning, distribution of drought tolerant seeds and livestock vaccination activities in Binga.



Macro-economic situation

Zimbabwe's annual inflation rate fell to 18.4% in September 2023 from 77.2% in the prior month after ZIMSTAT changed its methodology to reflect the increased use of US dollars in the economy. The new methodology (introduced in September 2023) which according to ZIMSTAT, reflect the weight of the USD and ZWL transactions thus it more accurately reflects the situation. The month-on-month inflation rose to 1% after two consecutive months in the negative range.

The exchange rate between the ZWL and the USD increased by 19% from ZWL 4604.62/USD in August on the official market to ZWL 5466.75/USD in September, and the parallel exchange by 15% from ZWL 6000.00/USD in August to ZWL 6900/USD in September.

The USD (96% of traders), followed by the bond note (51% of traders) are the most commonly accepted currencies by traders across the country. The rand is accepted by an average 48% of traders although most of these traders are in Matabeleland South and districts in central and southern Masvingo province. According to HungerMap LIVE, in September most surveyed households (74%) used the USD to purchase food and non-food commodities, followed by ZWL swipe or mobile money at 15%, the Rand at 8% and lastly ZWL cash at 3%. The rand was a significant currency of use in Matabeleland South province at 52% followed by Masvingo at 12% and Bulawayo at 5%.

According to ZIMSTAT, the Total Consumption Poverty Line (TCPL) for Zimbabwe was ZWL 95 462,53 per person in September representing an increase of 4,8% compared to the August comparative of ZWL 91 063,30.

NB: The inflation reported is based on the changes in the blended consumer price index, which blends prices in both US and Zimbabwean dollars. The new methodology for inflation is taking into account the accurate computation of the two indices taking into account their weights. It takes into account the participation of the weights, that is the USD which is normally 80% of the weights and the ZWL is about 20% of the weights The TCPL represents minimum needs basket cost (a measure of how much an individual requires for both food and non-food items to meet their basic essential needs.

Figure 6: Blended Inflation rates

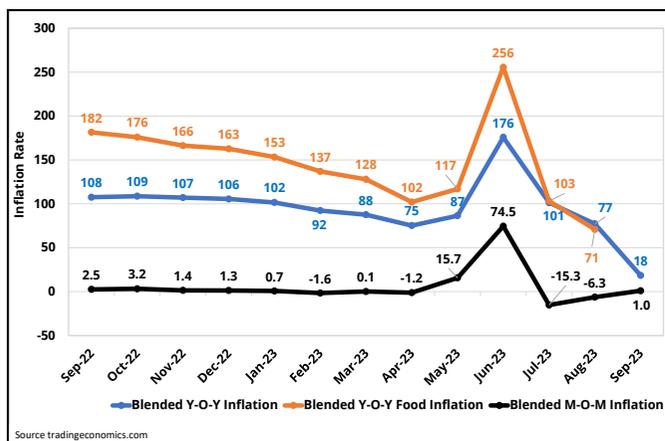


Figure 7: Trends in Exchange Rates USD : ZWL

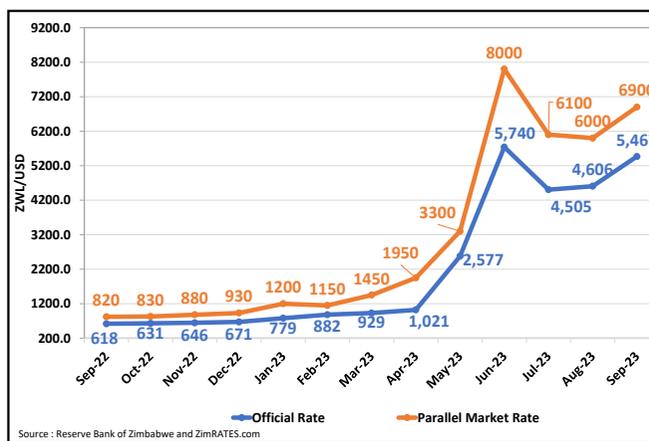
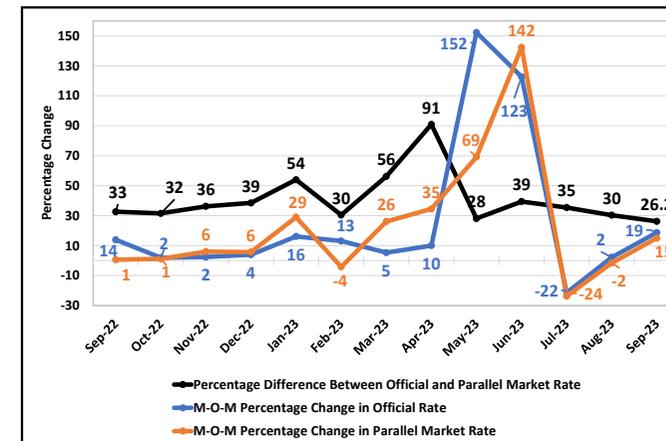


Figure 8: Percentage Changes in Exchange Rates USD : ZWL





Rural Market Performance Update: a review of availability and prices of basic food basket commodities (ZWL and USD)

The cost of the minimum expenditure (MEB) food basket remained stable in both ZWL and USD terms compared to the previous month. Compared to a year ago, the cost of the food basket has increased by 538% in ZWL terms and decreased by 10% in USD terms (Figures 9 and 10).

Figure 9: Rural food MEB ZWL percentage change

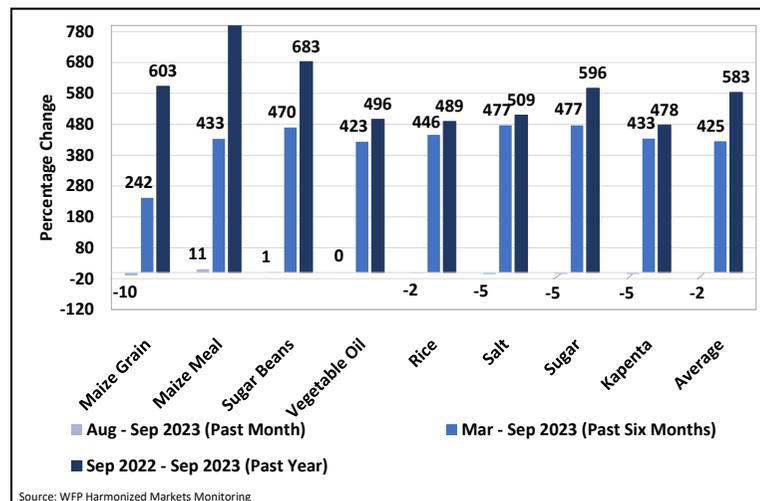
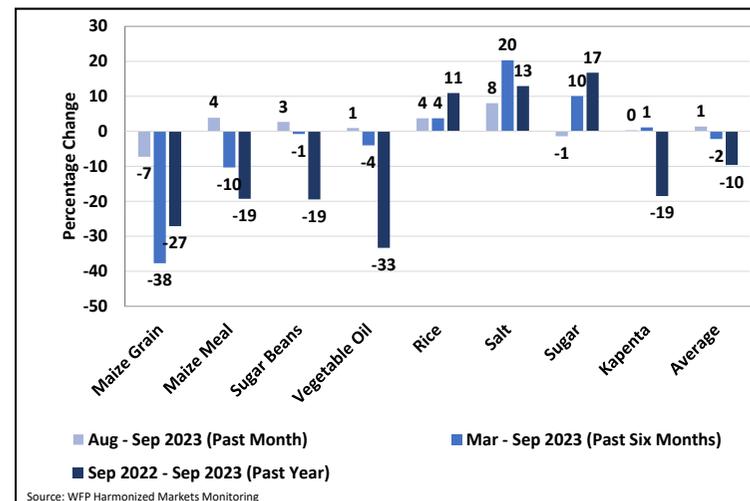


Figure 10: Rural food MEB USD percentage change



Overall availability of monitored food items has remained stable, but low for maize grain (14%), maize meal (41%) and sugar beans (50%) (Table 1).

The ZWL prices of all monitored commodities are generally stable when compared to the previous months. The decrease in maize grain prices is likely not significant due to the low availability of the commodity whilst the price increase for mealie meal in ZWL is likely due to increased demand as more households tend to rely on the market for the staple as harvest stocks deplete. (Fig. 9).

In USD terms, prices of most monitored commodities remained stable between August and September (Figure 10). Compared to the same time the previous year, there has been an overall decrease in prices of monitored food items except for salt and sugar which increased by 13% and 17% respectively.

Table 1: Commodity prices in ZWL, USD and availability (%) in rural markets

ITEM	USD	Bond	Availability
Maize Grain/Kg	0.27	1542.15	14
Maize Meal/Kg	0.51	3116.02	41
Sugar Beans/Kg	1.91	11562.28	50
Vegetable Oil/L	2.03	11236.27	81
Rice/Kg	0.97	5219.90	79
Salt/Kg	0.64	3308.41	78
Sugar/Kg	1.32	7309.62	78
Kapenta/Kg	9.78	55841.67	57



Urban Market Performance Update: a review of availability and prices of basic food basket commodities (ZWL and USD)

In comparison with the previous month, the average cost of the minimum expenditure (MEB) food basket in ZWL terms increased by 33%, while in USD terms, it remained stable (Figures 11 and 12). Compared to one year ago, the basket has remained stable in USD and increased by 741% in ZWL terms.

Figure 11: Urban food MEB ZWL percentage change

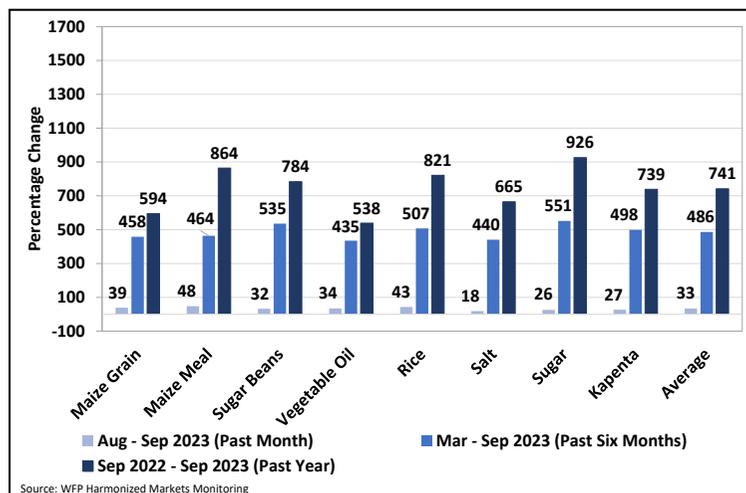
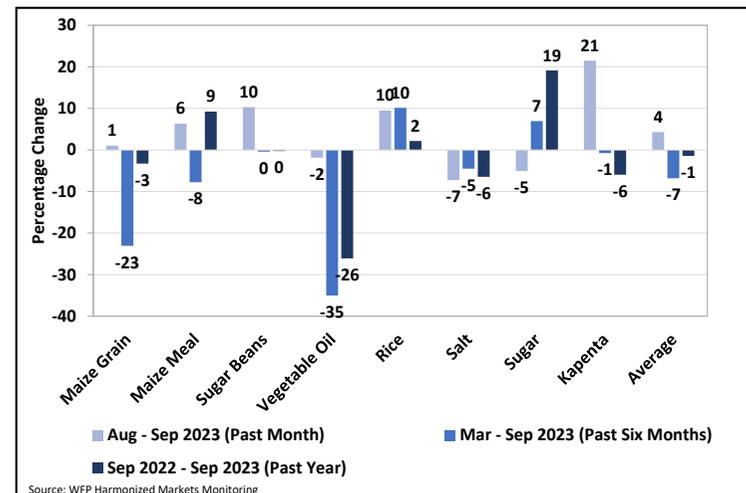


Figure 12: Urban food MEB USD percentage change



Compared to the previous month, availability of minimum expenditure food items in monitored markets has been stable over the past months but very low for maize grain (22%) (Table 2).

The ZWL cost of all monitored food items increased for all commodities after being stable in the previous 2 months. Compared to the past year (Figure 11), the prices have increased by 741%. The ZWL price increases are likely a response to the increased inflation rate following a 2 month stable phase.

The USD prices generally remained stable though an increase was observed in the price of sugar beans (10%), rice (10%) and Kapenta (21%) (Figure 12). The observed price stability can be attributed to higher supply of goods in the urban areas and lesser transportation cost compared to rural areas. These prices will be monitored closely to ascertain any relations to production for the 3 commodities and global price trends specifically for rice. Global prices for rice have been on the rise since June 2023.

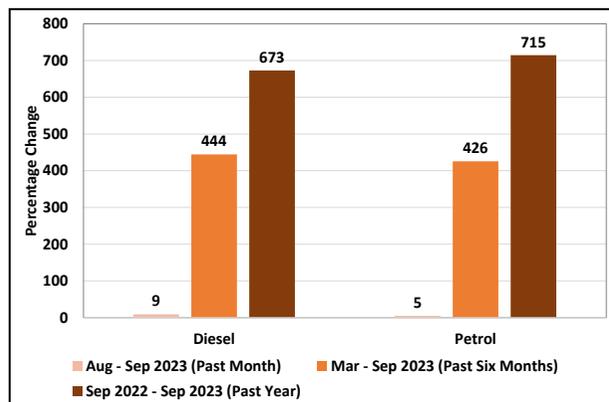
Table 2: Commodity prices in ZWL, USD and availability (%) in urban markets

ITEM	USD	Bond	Availability
Maize Grain/Kg	0.30	1542.15	22
Maize Meal/Kg	0.52	3367.72	71
Sugar Beans/Kg	1.86	12298.93	80
Vegetable Oil/L	1.73	11053.50	76
Rice/Kg	0.94	6067.55	74
Salt/Kg	0.50	3040.58	71
Sugar/Kg	1.29	8321.82	71
Kapenta/Kg	10.92	68611.84	63



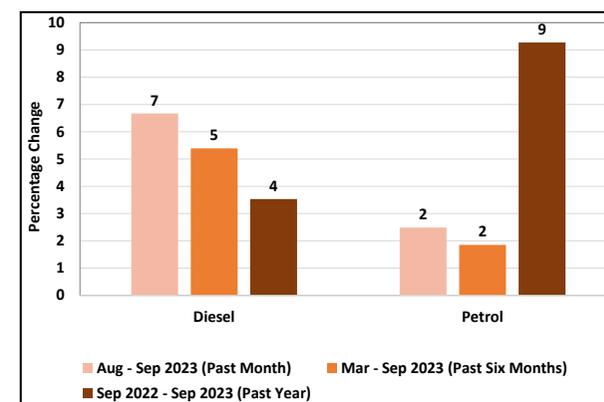
Fuel price (USD and ZWL)

Figure 13: Fuel ZWL prices percentage change



Compared to the previous month, the price of fuel slightly increased in ZWL terms (Figures 13). The USD prices remained stable for petrol but increased by 7% for diesel. In comparison with the same time 6 months and a year ago ZWL prices were significantly higher (Figure 13). The price of diesel was pegged at ZWL 8160.44/L and USD 1.76/L whilst petrol was pegged at ZWL 7,648.14/L and USD 1.65/L in the first week of September 2023.

Figure 14: Fuel USD prices percentage change



Non-food commodities (USD and ZWL)

Availability of soap has remained stable in both urban and rural markets compared to August (Table 3).

USD prices for all monitored non-food commodities in all markets decreased (Table 4).

NB: *(The cheapest brand is monitored, however sometimes due to unavailability different brands are monitored which could explain the high price differences).*

Table 3: Non-Food Commodity prices in ZWL, USD and availability

Commodity	Aug	Sep	Avail % change		Aug (\$)	Sep (\$)	% change \$		Aug (ZWL)	Sep (ZWL)	% change ZWL	
Laundry Soap Rural	89%	90%	1%	↔	\$ 1.39	\$ 1.38	-1%	↔	ZWL 7,409.44	ZWL 6,999.98	-6%	↓
Laundry Soap Urban	100%	100%	0%	↔	\$ 1.29	\$ 1.05	-19%	↓	ZWL 5,744.00	ZWL 6,538.50	14%	↑
Bathing Soap Rural	85%	86%	1%	↔	\$ 0.86	\$ 0.37	-57%	↓	ZWL 4,930.10	ZWL 2,077.53	-58%	↓
Bathing Soap Urban	100%	100%	0%	↔	\$ 0.72	\$ 0.29	-60%	↓	ZWL 3,365.43	ZWL 1,766.43	-48%	↓



Methodology



Data for this reporting period was collected between 1-30 September 2023 and is based on interviews with 440 traders of which 417 were in rural and 23 in urban districts. About 95% of the interviews were conducted face-to-face while other interviews were collected remotely.

Checking availability at market level: If a trader reports having sold a commodity within the last week, the commodity is considered available in their respective market. Availability at country-level (district-level) is calculated as the share of markets with commodity availability across the country (across districts). Missing data indicate that none of the interviewed traders generally trades the commodity. For the full harmonized markets monitoring database, please visit: [Economic: Prices - Dataviz | WFP - VAM](#).

The harmonised markets monitoring initiative is conducted by WFP in partnership with members of the National Cash Assistance Working Group (NCWG).

Partners who collected this month's data:

AARDS, Plan International, Terre Des Hommes Italia, Welthungerhilfe and World Vision Zimbabwe



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