

Food Security and Markets Monitoring Report

Situation Update

Zimbabwe is experiencing a delayed onset of rainfall, with most areas receiving below-average rain to date. Typically, the rainy season begins in mid-November, but significant rains have yet to be recorded in many regions. Vegetation and grazing conditions remain poor following the 2023/24 drought, negatively impacting livestock and draught power availability for planting. Immediate forecasts from SARCOF indicate a likelihood of normal to above-normal rainfall for much of the country in the period December 2024 to March 2025. However, normal to below-normal rainfall may still be experienced in localized areas during the same period. The transition to a weak La Niña phase later in 2024 is expected to improve rainfall prospects, albeit with some uncertainties. The most recent short term forecast points to drier conditions than normal in the short term alluding the need for increased alertness and monitoring.

The government, with the support of WFP and other partners, continues with the drought response across the country. The focus is on food assistance for the most vulnerable households coupled with input support for the current agriculture season.



Highlights



In USD terms, the month on month inflation was 0.1% while the annual inflation was 3.3% for November 2024. In local currency, the month on month inflation rate was 11.7% down from 37.2% in October 2024 .



The WFP Hunger Map Live continues to show a high food insecurity situation in the country with about 36% of the rural population facing insufficient food consumption and 70% engaged in crisis and above coping strategies in November 2024.



Price of food on the international market saw a slight upward movement of about 0.5% according to the FAO price index. The index stood at 127.5 points. The upward movement is the largest month-on-month increase since April 2023.



Maize grain continues to be unavailable on the monitored markets while unrefined maize meal was available in an average of 95% of the rural and urban markets. Other food commodities monitored were generally available in most markets except for chicken, eggs, and vegetables in formal rural markets as these are mainly sold at household level.



The USD cost of the monitored food and non food essential needs basket was stable in both urban and rural markets when compared to October 2024.



Food security situation

The WFP Real-time Monitoring, estimated about 36% or approximately 5.7 million rural people to be facing insufficient food consumption at the end of November 2024, which is similar to the October 2024 estimates (**Figure 1**). The number of people resorting to ‘crisis and above’ food-based coping strategies was estimated at 10 million similar to the previous month (**Figure 1**). This trend is in line with the 2024 Rural ZimLAC projections showing a deterioration in the rural food security situation from 46% during the quarter July to September 2024 to 52% from October to December 2024.

FEWSNET’s latest Food Security Outlook indicates Crisis-level (IPC Phase 3) food insecurity throughout the country from October 2024 to March 2025. This period marks the pre-harvest period and peak lean season, the time when food assistance needs are expected to rise above normal levels. Improvements in food security are anticipated in April or May (harvest time), shifting conditions to Stressed (IPC Phase 2) in some areas. Although the upcoming 2024/25 rainy season is expected to alleviate some critical water and pasture shortages, the lasting effects of last season’s drought, intensified by El Niño, will likely continue to impact livelihoods until significant harvests are realised. Reduction in casual labour demand, lower wages, fewer self-employment options, and diminished livestock income are projected to affect households throughout this period, limiting economic resilience.

According to the SADC Agromet Update of November 2024, as of early November 2024, much of Southern Africa has yet to experience an effective onset of rainfall, with north-western and southeastern areas recording below-average rainfall despite the typical mid-November start. Vegetation and livestock conditions remain below average following the 2023/24 drought, reducing draught power for planting. SARCOF predicts normal to above-normal rainfall across most areas from December 2024. However, the (El Niño Southern Oscillation) ENSO is forecast to transition to a weak La Niña phase, bringing uncertain rainfall outcomes. Critically low Kariba Dam water levels have caused extensive load-shedding in Zambia and Zimbabwe, disrupting livelihoods. According to the WFP Seasonal monitor, the second dekad of December will be characterized by mixed conditions in Southern Africa, with central and eastern parts of the region (including Zimbabwe) facing drier than normal conditions and northern and western areas expected to experience wetter than normal conditions. (**Figure 2**)

Figure 1: Prevalence of Insufficient Food Consumption and Livelihood Coping by Province

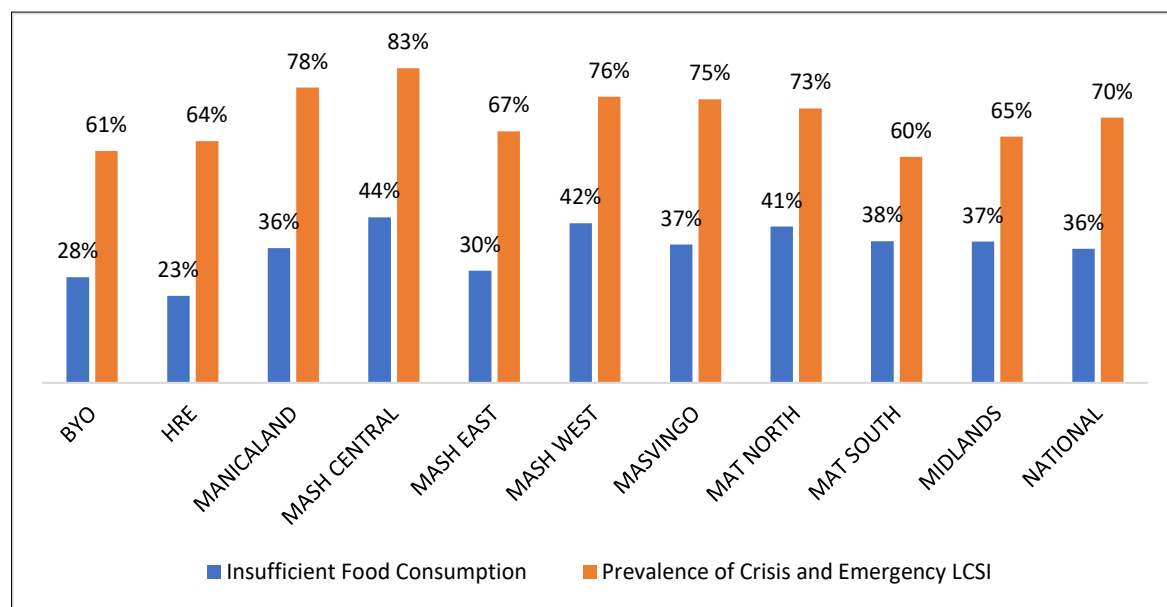
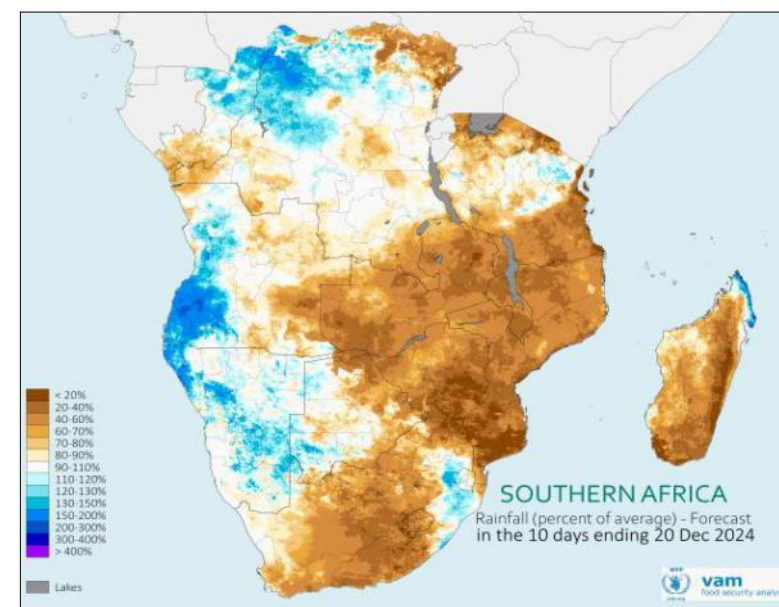


Figure 2: 10 Day rainfall forecast ending 20 December





Macro-economic situation

The annual inflation in USD was 3.3% in November 2024 down from 4.1% reported in October 2024. The USD month-on-month inflation rate was 0.1%, down from 0.7% reported in October 2024 (**Figure 3**). In local currency, the monthly consumer inflation was 11.7% in November 2024, down from 37.2% in October. This marks the first decline in 4 months indicating some stabilization of the local currency against the USD.

At the end of November 2024, the foreign currency exchange rate was ZWG25.46 to 1USD which is 11% lower than ZWG28.68 to 1USD recorded at the end of October, 2024. The parallel market exchange rate remained the same at about ZWG37.00 in November 2024 when compared to October 2024 (**Figure 4 and 5**).

The Zimbabwe Statistical Agency, ZIMSTAT, set the Food Poverty Line (FPL) for an individual in November 2024 at ZWG770.84 representing a 73% increase from ZWG446.56 in September 2024. The Food Poverty Line represents the minimum amount of money that an individual require to access daily minimum energy intake of 2,100 calories, ensuring basic nutritional needs are met. The Total Consumption Poverty Line (TCPL) for one person in November 2024 was ZWG1,110.72 representing an increase of 63% from ZWG681.79 in September 2024. The Total Consumption Poverty Line represents the minimum total income required for an individual to meet both food and non-food needs and be above the poverty line so as not to be deemed poor.

The FAO Food Price Index (FFPI) averaged 127.5 points in November 2024, up 0.5 percent from the October level and reaching its highest value since April 2023. The increase was driven by higher price quotations for dairy products and vegetable oils, which slightly outweighed declines in the meat, cereals, and sugar quotations. Compared to historical levels, the FFPI in November was 5.7 percent higher than its corresponding value a year ago but remained 20.4 percent below its peak of 160.2 points reached in March 2022.

Figure 3: Inflation rates (USD)

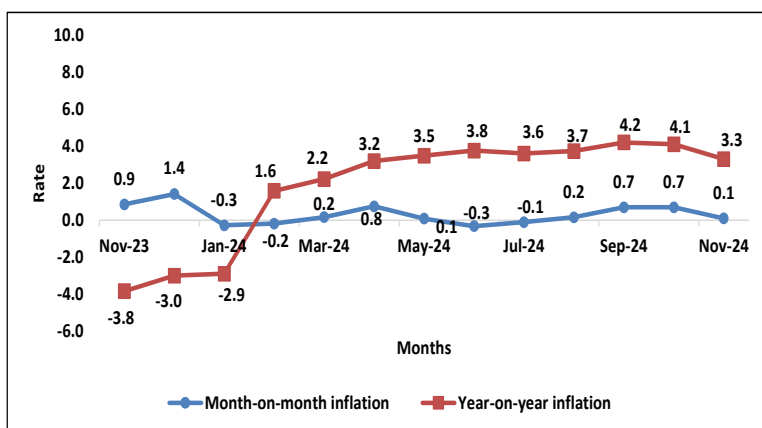


Figure 4: Exchange rate trends

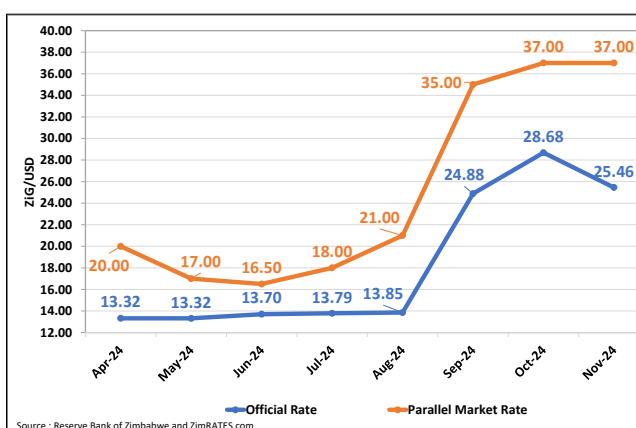
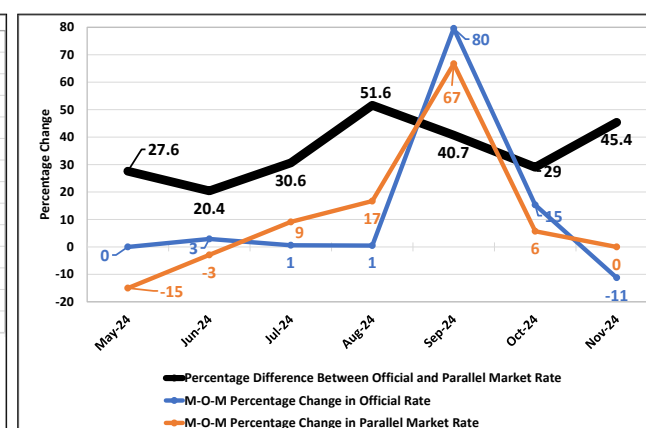


Figure 5: percentage change in exchange rates



Data Source: Reserve Bank of Zimbabwe, 2024



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

The USD value of the Minimum Expenditure Basket (MEB) which represents minimum household requirements to meet their essential needs, was estimated at an average of \$23.70 which is similar to the \$23.62 in October 2024. This cost was similar to the cost 3 months ago and 16% higher than the cost a year ago. The local currency (ZWG) cost of the MEB was estimated at ZWG878.70 in November 2024 which is 20% higher than the average price of ZWG730.58 reported in October 2024.

Figure 6: Rural food MEB ZWG percentage change

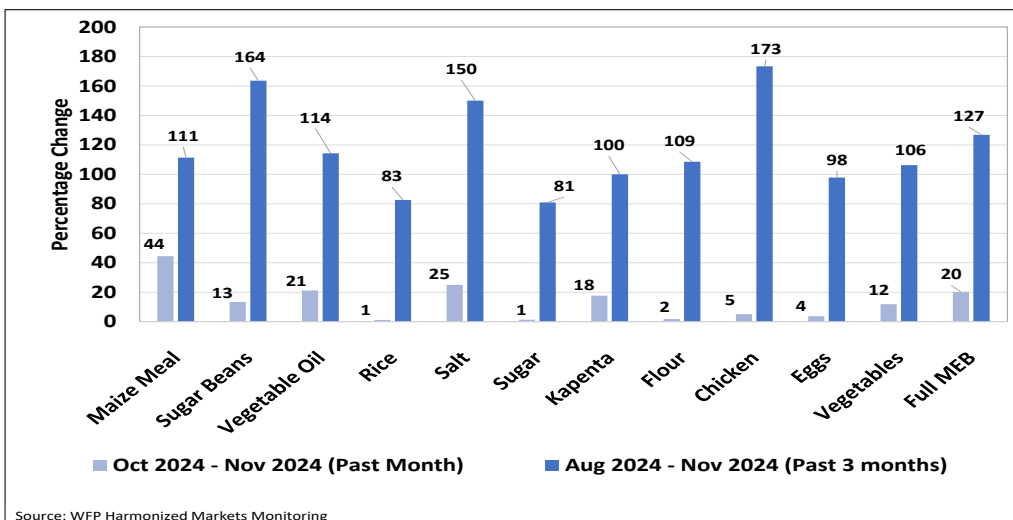


Figure 7: Rural food MEB USD percentage change

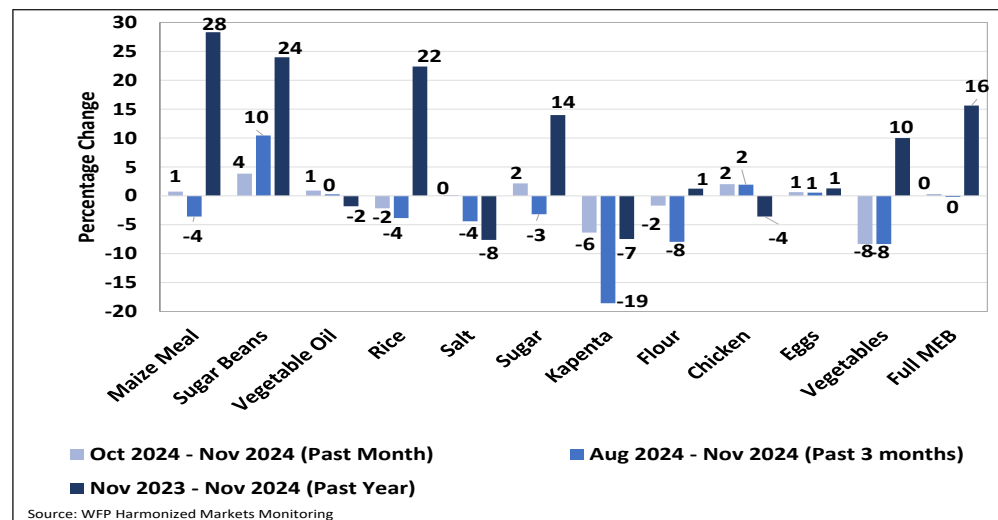


Table 1: Commodity prices in USD and availability (%) in rural markets

Availability of most commodities remained high and comparable to availability in October 2024 (**Table 1**). Maize grain continued to be unavailable on the formal market and households rely more on maize meal which cost about 50% higher compared to the price of maize grain. Although the availability does not account for farmer-to-farmer sales at household level, where maize grain is mainly sold in rural communities. Availability of vegetables continues to be poor as a result of low production due to water shortages across the country which have negatively impacted on production of vegetables, horticulture and livestock.

Prices in USD terms for all food commodities remained stable (**Figure 7 and Table 1**). In ZWG terms, prices generally increased by an average of 20% when compared to October 2024 and by an average of 127% when compared to August 2024 (**Figure 6**). Higher price increases were reported for maize meal (44%), salt (25%) and vegetable oil (21%).

ITEM	USD % price			ZWG % price		Oct Availability	Nov Availability	
	Oct USD	Nov USD	change	Oct ZWG	Nov ZWG			
Maize Grain/Kg								
Maize Meal/Kg	0.65	0.65	1%	18.00	26.00	44%	82	89
Sugar Beans/Kg	2.34	2.43	4%	90.00	102.00	13%	72	68
Vegetable Oil/L	1.81	1.83	1%	49.50	60.00	21%	100	100
Rice/Kg	1.24	1.21	-2%	41.50	42.00	1%	94	98
Salt/Kg	0.54	0.55	0%	16.00	20.00	25%	100	100
Sugar/Kg	1.41	1.44	2%	37.50	38.00	1%	100	99
Kapenta/Kg	10.00	9.36	-6%	340.00	400.00	18%	80	70
Flour/Kg	1.03	1.01	-2%	33.40	34.00	2%	88	89
Chicken/Kg	3.50	3.57	2%	117.02	123.00	5%	11	10
Eggs/Kg	2.78	2.80	1%	69.44	72.00	4%	44	40
Vegetables/Kg	1.20	1.10	-8%	29.50	33.00	12%	6	8



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

The cost of the full minimum expenditure (MEB) food basket in USD in urban markets was estimated at an average price of USD24.50 which is stable when compared to USD24.63 reported in October 2024. Compared to a year ago, the USD cost of the basket increased by 21%. In local currency the cost was estimated at an average price of ZWG870.67 an increase of 19% when compared to ZWG 731.68 in October 2024.

Figure 8: Urban food MEB ZWG percentage change

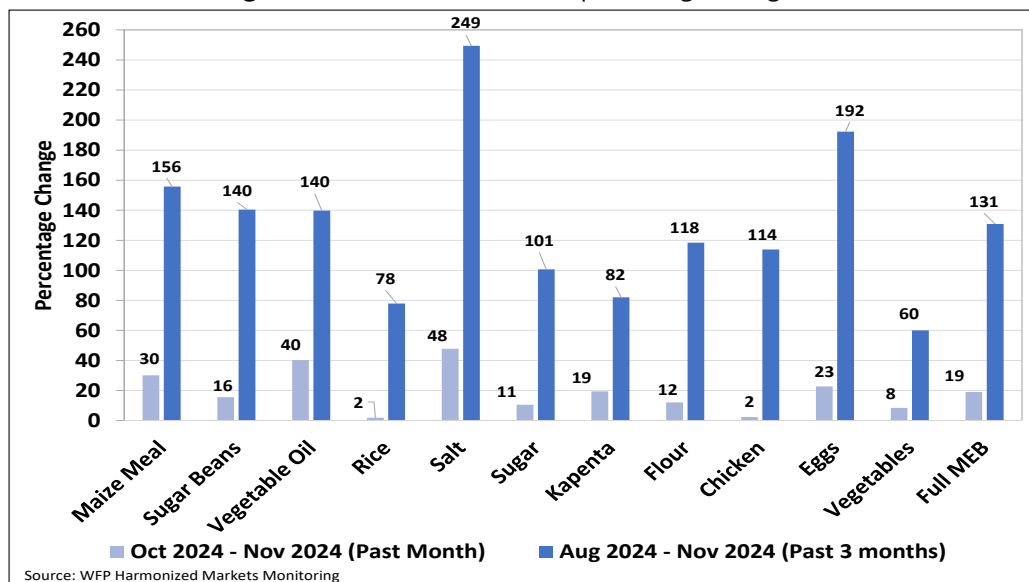
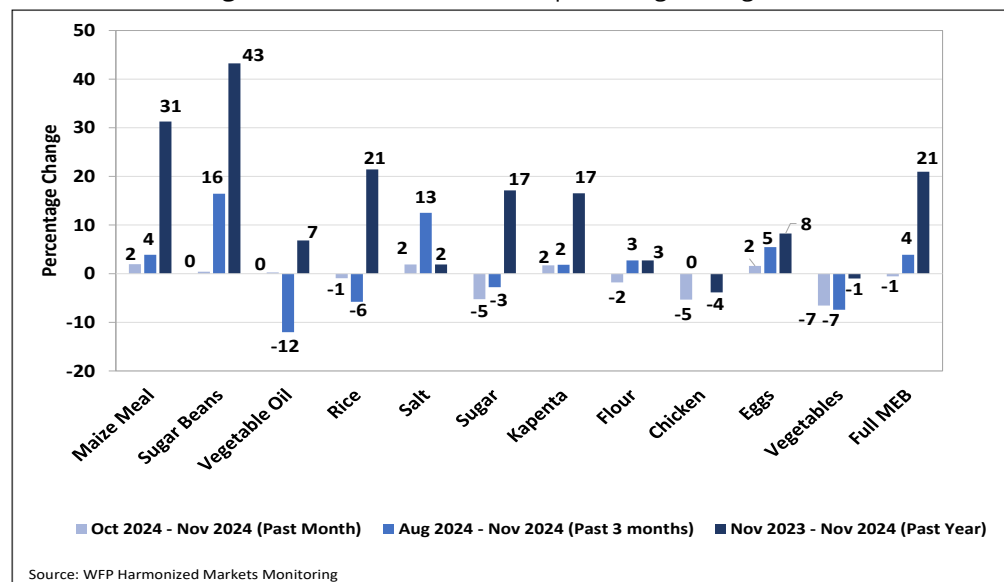


Figure 9: Urban food MEB USD percentage change



Availability of the monitored food items was generally high and stable when compared to the previous month. (Table 2).

Prices in USD were generally stable when compared to the previous month (Figure 9).

In local currency, prices increased across the commodities, with the highest price increase observed for salt (48%), vegetable oil (40%) and maize meal (30%) (Figure 8). Compared to August 2024, prices increased by an average of 131%. The price increases are likely a result of the increases in the parallel market exchange rate which pushed prices in local currency up since August.

The international market remains stable with improvements in production and competition and efficient cereal movement. These effects coupled with government stabilization measures are the likely result in price stability across most commodities.

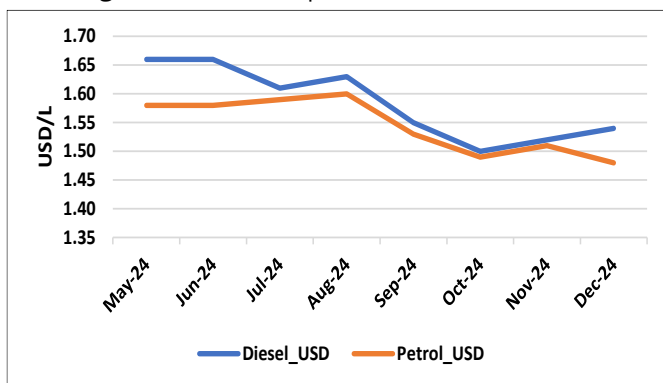
Table 2: Commodity prices in ZWG, USD and availability (%) in urban markets

ITEM	USD % price			ZWG % price		Oct Availability	Nov Availability
	Oct USD	Nov USD	change	Oct ZWG	Nov ZWG		
Maize Grain/Kg	-	-	-	-	-	-	-
Maize Meal/Kg	0.66	0.67	2%	19.54	25.43	92	100
Sugar Beans/Kg	2.81	2.82	0%	83.93	97.00	94	100
Vegetable Oil/L	1.76	1.76	0%	50.79	71.25	95	100
Rice/Kg	1.20	1.19	-1%	35.08	35.74	96	100
Salt/Kg	0.53	0.54	2%	17.54	25.92	95	100
Sugar/Kg	1.57	1.49	-5%	41.04	45.38	94	100
Kapenta/Kg	11.33	11.53	2%	358.00	427.50	88	80
Flour/Kg	1.05	1.03	-2%	29.66	33.25	92	100
Chicken/Kg	3.70	3.50	-5%	117.00	119.78	48	49
Eggs/Kg	2.79	2.84	2%	85.28	104.64	78	83
Vegetables/Kg	1.07	1.00	-7%	29.50	32.00	46	67



Fuel price (USD and ZWG)

Figure 10: Fuel USD prices trends

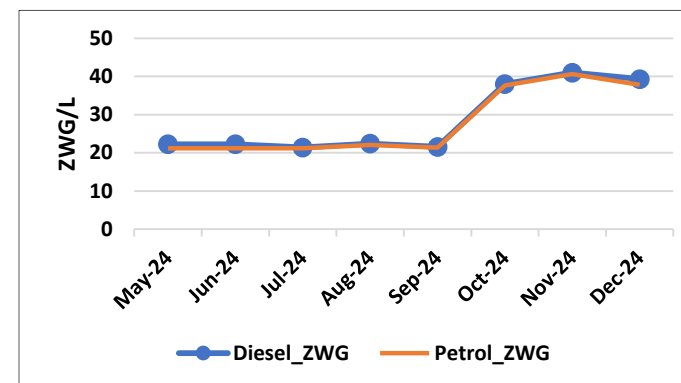


Data Source: ZERA, 2024

The price of diesel and petrol is currently pegged at \$1.54/L and \$1.48/L respectively. The price is comparable to the October price (**Figure 10**). In comparison with the same time a year ago, the USD prices were 12% and 7% less for diesel and petrol respectively.

In local currency the current (December) price of fuel were comparable to the November prices for both diesel and petrol (**Figure 11**).

Figure 11: Fuel ZWG price trends



Data Source: ZERA, 2024

Non-food commodities (USD and ZWG)

Availability of soap remained stable in both rural and urban markets when compared to October 2024 (**Table 3**).

In local currency, the price of soap in both rural and urban markets increased by an average of 23%. (**Table 3**).

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

USD prices for soap remained stable in both rural and urban markets.

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

Commodity	Availability			Price in USD				Price in ZWG			
	Oct	Nov	Avail % change	Oct (\$)	Nov (\$)	% change \$	Oct (ZWG)	Nov (ZWG)	% change \$		
Laundry Soap Rural	96%	97%	1% ↔	\$ 1.27	\$ 1.28	1% ↔	ZWD 33.80	ZWD 35.76	6%	↑	
Laundry Soap Urban	96%	98%	2% ↔	\$ 1.28	\$ 1.32	3% ↔	ZWD 31.00	ZWD 41.47	34%	↑	
Bathing Soap Rural	96%	96%	0% ↔	\$ 0.33	\$ 0.32	-3% ↔	ZWD 13.14	ZWD 16.56	26%	↑	
Bathing Soap Urban	96%	100%	4% ↔	\$ 0.29	\$ 0.30	3% ↔	ZWD 11.42	ZWD 14.50	27%	↑	

Data Source: WFP Harmonised Markets Monitoring, 2024



Methodology



Data for this reporting period was collected between 1-30 November 2024 and is based on interviews with 55 traders of which 32 were in rural and 23 in urban districts. About 80% 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 district-level is calculated as the share of markets with commodity availability 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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