

Food Security and Markets Monitoring Report

Situation Update

The 2024/2025 cropping season had a late start mainly in the northern districts as a result of poor rainfall distribution across most parts of the country during the first half of the season. However, from mid-December, rainfall distribution improved, with heavier falls recorded in the southern provinces, bringing renewed hope to farmers. The Meteorological Services Department has forecasted normal to above-normal rains for the second half of the season.

The total area planted under field and plantation crops was estimated at 3.5 million hectares against a planned target of 4 million hectares. Total area planted under staple cereals, including maize and traditional grains, reached a total of 2,540,000 hectares, surpassing the target of 2,520,000 hectares by 0.8%.

Access to food was reported to have improved due to the coming in of the harvest as well as vegetables from gardening activities. Income from the sale of the produce was reported to be improving leading to households being able to meet some of their essential needs.



Highlights



In USD terms, the month on month inflation was 0.2% down from 11.5% while the annual inflation was 14.6% for February 2025. In local currency, the month on month inflation rate was 0.5% down from 10.5% in January 2025 (RBZ).



The WFP internal crop and livestock monitoring continue to note some improvements in crop, livestock and pasture conditions in several districts in the country due to significant rains received in both surplus and deficit- producing areas.



Price of food on the international market saw a slight downward movement of about 1.6% according to the FAO price index. The index stood at 124.9 points.



Maize meal was available in an average of 90% 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 seasonal rainfall performance has been characterised by mixed conditions with the southern parts of the country receiving above normal rains while the north received normal to below normal rainfall



The USD and ZWG cost of the monitored food and non food essential needs basket remained the same in both urban and rural markets when compared to January 2025.



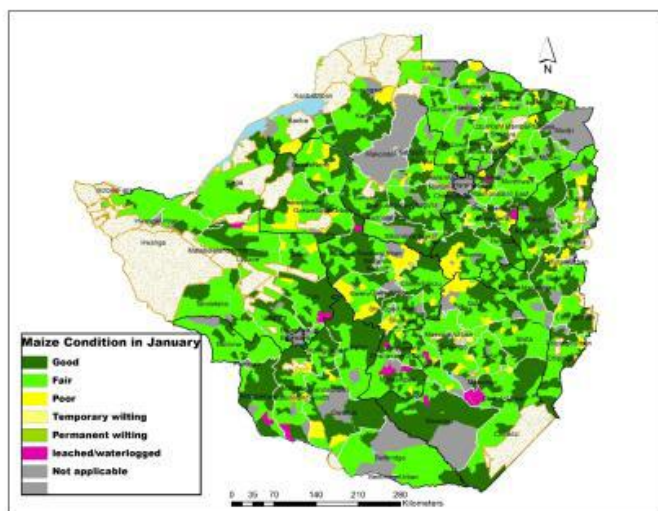
Food security situation and the progression of the rainfall season

The 2024/2025 cropping season had a late start mainly in the northern districts as a result of poor rainfall distribution across most parts of the country during the first half of the season. Localized prolonged mid season dry spells were experienced across the country causing permanent wilting of crops in some parts of country which lead to wide spread replanting in late December into January when the country received significant rainfall. Most farmers from traditional maize-growing areas switched to small grains and pulses anticipating poor rainfall distribution during the second half of the year. However, from mid-December, rainfall distribution improved, with heavier falls recorded in the southern provinces, bringing renewed hope to farmers. The Meteorological Services Department has forecasted normal to above-normal rains for the second half of the season.

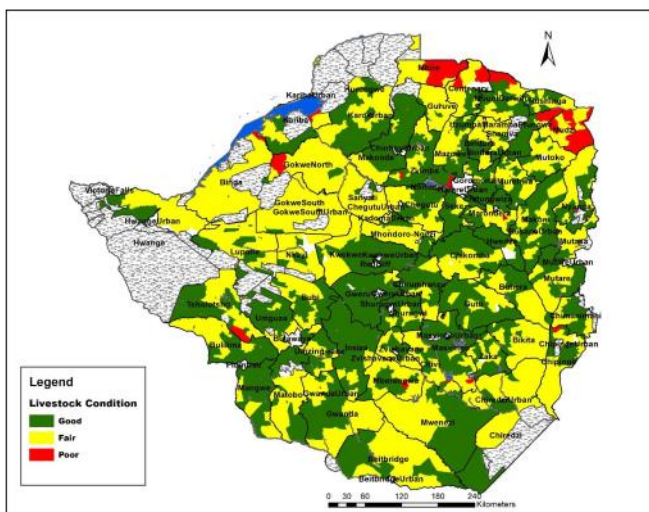
According to the First Round Crops, Livestock and Fisheries Assessment Report (CLAFRA-1), the total area planted under field and plantation crops was estimated at 3.5 million hectares against a planned target of 4 million hectares. Area planted under maize increased by 5.4%, from 1.7 million hectares during the 2023/24 season to 1.8 million hectares in the 2024/25 season. The total area planted under staple cereals, including maize and traditional grains, reached a total of 2,540,000 hectares, surpassing the target of 2,520,000 hectares by 0.8%. About 74,000 hectares were written off due to a prolonged dry spell between late November and mid-December 2024.

The findings from the WFP internal food security monitoring showed that in February the majority of farmers in rural areas engaged in crop management activities which include weeding, fertilizer application and harvesting. Casual labour opportunities are reported to be available mainly in the agricultural sector, however, they are reported to be accessed by a few households as compared to other seasons as most farmers are facing liquidity challenges after the El Nino induced drought from the previous season. Petty trade remains the dominant livelihood activity, particularly amongst urban dwellers. Livestock condition is reported to be mainly good across the country due to an increase in water and pasture availability. Terms of trade for livestock are likely to improve compared to the previous season. As confirmed by the CLAFRA report (**Map 1**) most of the maize crop is in fair to good condition and most of the livestock is in fair to good condition (**Map 2**). Fall Armyworm surveillance is ongoing throughout the country and outbreaks have been observed in Buhera, Goromonzi and UMP and potential outbreaks are possible in other districts of Mashonaland East and Central provinces (**Map 3**).

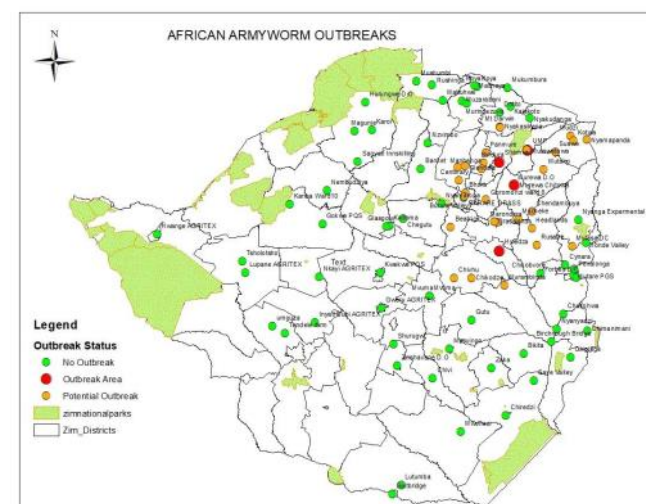
Map 1: Maize Condition in January 2025 (CLAFRA, 2025)



Map 2: Livestock Condition in February (CLAFRA, 2025)



Map 3: African Armyworm outbreak (CLAFRA, 2025)



Coping mechanism story



In Mwenezi, Nelta's resilience continues to shape her journey as she tends to her garden and maize field. The recent weeks have seen her harvesting some of her produce, which she now sells at a local market, offering a much-needed source of income. Despite the ongoing economic challenges, the normal rainfall received in January and her dedication to her crops has ensured a steady supply of vegetables, helping to sustain her household and provide for essential needs.

Her poultry project remains a work in progress, as she navigates persistent feed shortages. Through advice from the local AGRITEX officer, she has refined her feeding methods, incorporating locally available materials to sustain her chickens.

Nelta's determination has kept her moving forward, making small but crucial gains in her efforts to build a more stable livelihood. With each harvest and every egg collected from her hens, she remains hopeful, proving that persistence and adaptation are key to overcoming adversity. The story of Nelta, which has been followed since January, is a story of hard work and livelihood diversification.



Macro-economic situation

In February 2025, Zimbabwe's monthly consumer inflation rate for the local currency dropped to 0.5%, the lowest in seven months, marking a sharp decline from the previous month's rate of 10.5% (**Figure 5**). The deceleration in price growth was seen in both food and non-food categories, with food prices increasing by only 0.8%, down from 6.8% in January, and non-food items rising by 0.3%, compared to 4.6% in the previous month. The central bank has maintained its benchmark interest rate at 35% for the second consecutive month, signalling its continued commitment to a tight monetary policy aimed at reducing market volatility. Inflation in US dollar terms also dropped sharply from 11.5% in January to 0.2% in February (**Figure 4**). The blended inflation decreased from 11.6% in January 2025 to 0.3% in February 2025 (**Figure 5**). The ZWG accounted for 30% of all transactions in the country while the US dollar account for the remaining 70%.

At the end of February 2025, the foreign currency exchange rate was pegged at ZWG26.56 to 1USD which is comparable to ZWG26.37 to 1USD recorded at the end of January, 2025. The parallel market exchange rate remained stable at about ZWG37.00 to 1 USD in February 2025 similar to January 2025.

The FAO Food Price Index (FFPI) averaged 124.9 points in January 2025, reflecting a decrease of 2.1 points, or 1.6 percent, from its revised December level. This decline was driven primarily by lower prices for sugar, vegetable oils, and meat, which more than offset rising prices for dairy products and cereals. Despite this monthly decrease, the index was still 7.3 points, or 6.2 percent, higher than its level in January 2024. Nevertheless, it remained significantly lower—35.3 points, or 22.0 percent—below the all-time high recorded in March 2022.

Figure 4: Inflation rates (USD)

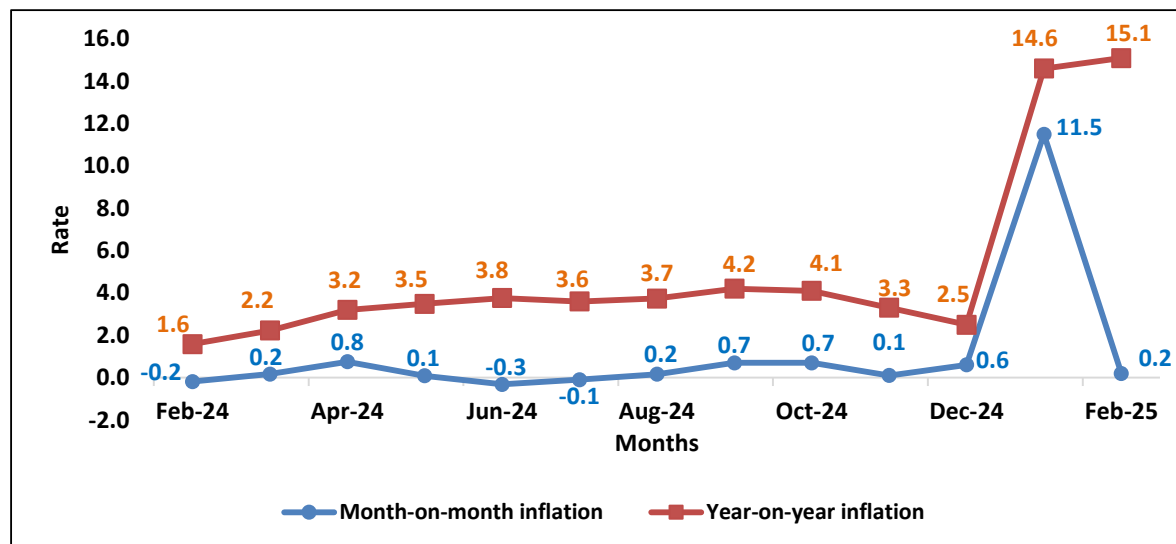
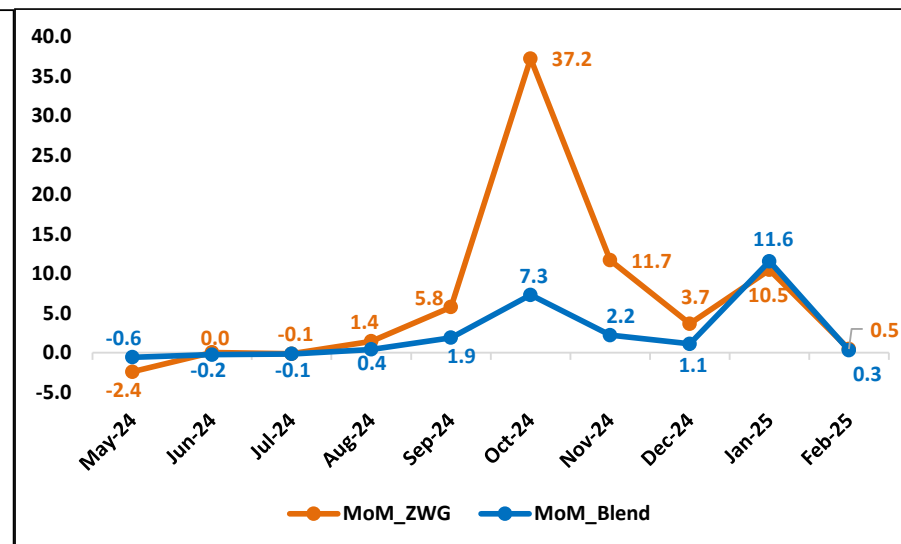


Figure 5: ZWG and Blended inflation



Data Source: Reserve Bank of Zimbabwe, 2025



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 \$23.30 which is 5% less than \$24.64 recorded in January 2025. The February 2025 cost was comparable to the cost 6 months ago and the cost a year ago. The local currency (ZWG) cost of the MEB was estimated at ZWG903.31 in February 2025 which is comparable to ZWG937.35 in January 2025.

Figure 6: Rural food MEB ZWG percentage change

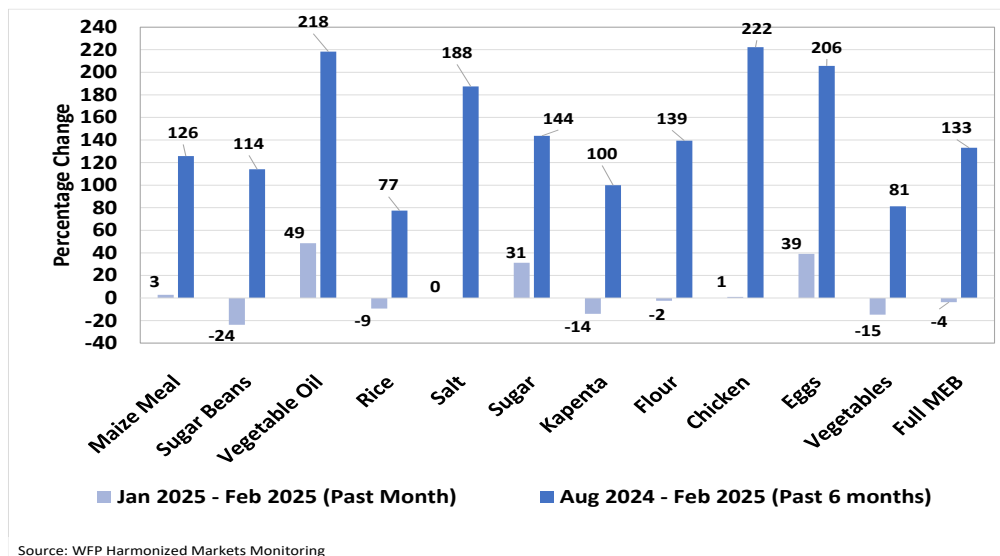
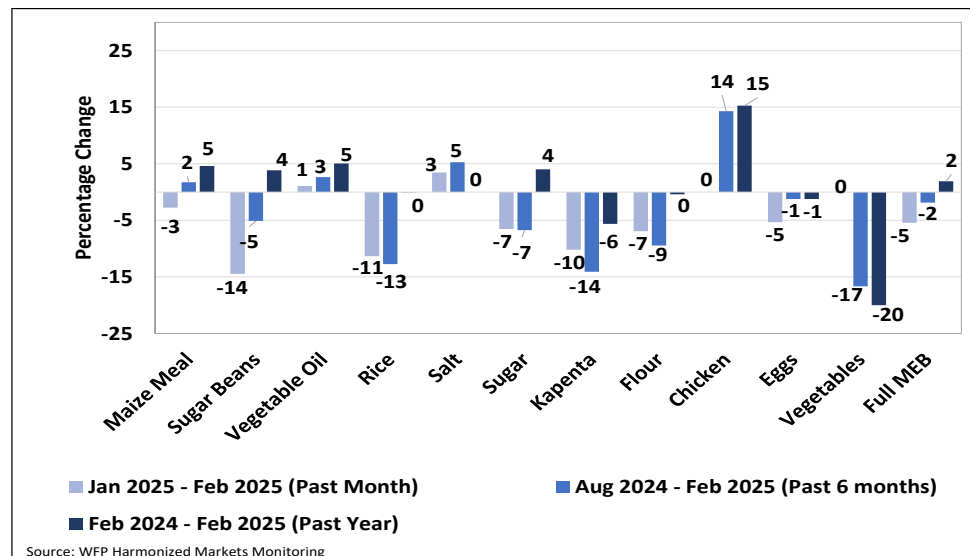


Figure 7: Rural food MEB USD percentage change



Availability of most commodities remained high and comparable to availability in January 2025 (**Table 1**). Maize, the primary staple, is available as mealie meal in shops. The supply is high and stable as most grain processors report enough stock of grain. Small grains like sorghum and millet were not available in the market but reported to be available with some farmers mainly from regions where the crop is grown. Seasonal produce such as green mealies, tomatoes, onions, and green leafy vegetables are increasingly available on the formal and informal market due to the increased availability of water.

Prices in both ZWG and USD terms remained stable for most of the food commodities during the month of February when compared to January 2025 (**Figure 6 and Table 1**). The price of vegetable oil, eggs and sugar, in local currency rose by 49%, 39% and 31% respectively. Prices in USD terms were comparable to 6 months ago (**Figure 7**). USD prices returned to stability after an unanticipated rise in January 2025. This is related to the stabilization of the month-on-month inflation rates.

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

ITEM	USD %			ZWG %				
	Jan USD	Feb USD	price change	Jan ZWG	Feb ZWG	price change	Jan Availability	Feb Availability
Maize Grain/Kg								
Maize Meal/Kg	0.71	0.69	-3%	27.00	27.77	3%	88	91
Sugar Beans/Kg	2.44	2.09	-14%	108.67	82.86	-24%	59	56
Vegetable Oil/L	1.85	1.87	1%	60.00	89.14	49%	93	100
Rice/Kg	1.24	1.10	-11%	45.00	40.81	-9%	100	100
Salt/Kg	0.58	0.60	3%	23.00	23.00	0%	100	100
Sugar/Kg	1.48	1.38	-7%	39.00	51.18	31%	100	95
Kapenta/Kg	11.00	9.88	-10%	465.00	400.00	-14%	83	91
Flour/Kg	1.07	1.00	-7%	40.00	39.03	-2%	97	96
Chicken/Kg	4.00	4.00	0%	143.50	145.00	1%	4	5
Eggs/Kg	2.90	2.75	-5%	80.00	111.27	39%	44	71
Vegetables/Kg	1.00	1.00	0%	34.00	29.00	-15%	5	5



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 USD23.90 which is stable when compared to USD24.89 reported in January 2025. Compared to a year ago, the USD cost of the basket increased by 9%. In local currency the cost was estimated at an average price of ZWG966.97 which is comparable to ZWG942.40 in January 2025.

Figure 8: Urban food MEB ZWG percentage change

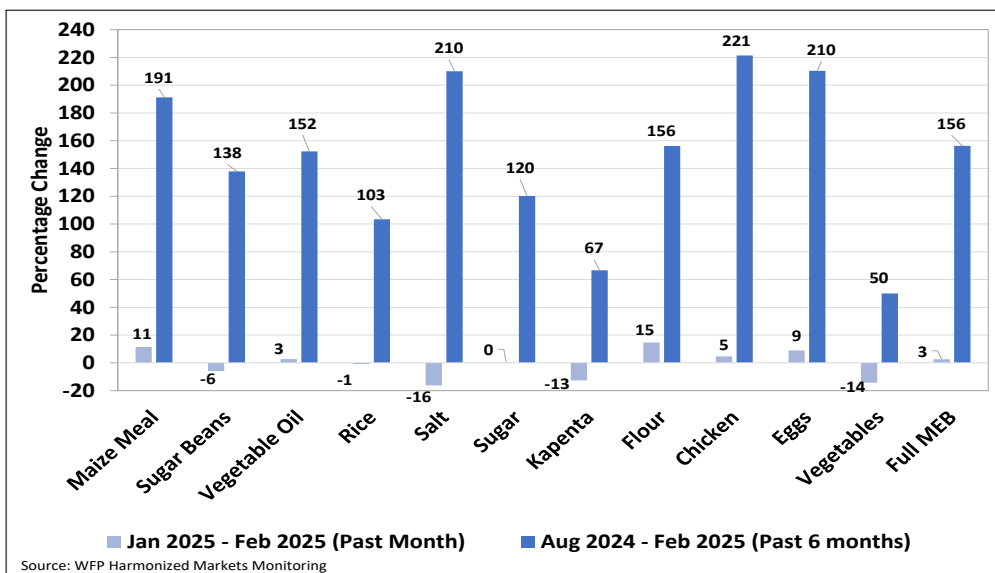
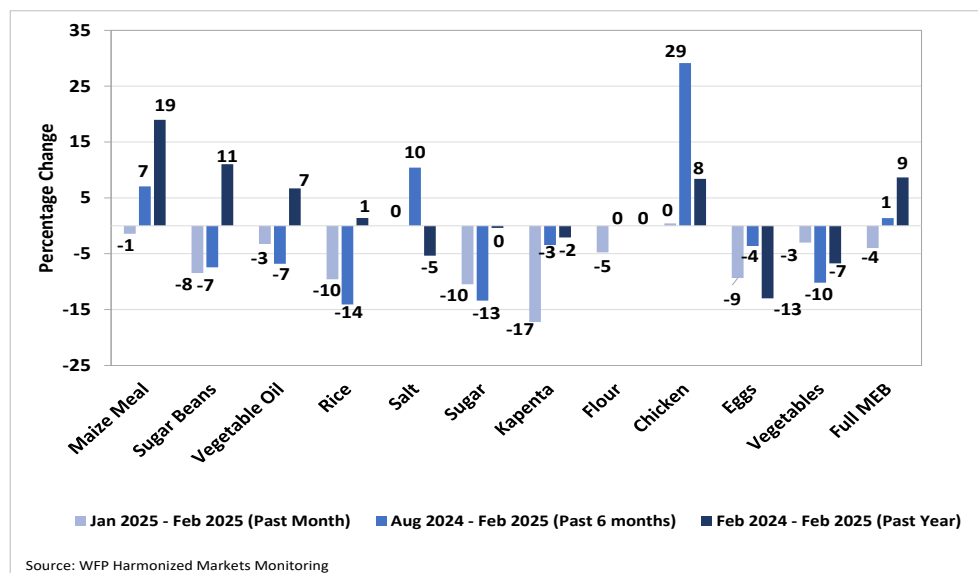


Figure 9: Urban food MEB USD percentage change



Maize meal, the primary staple, was generally available in urban markets reported by 92% of the monitored traders. The urban markets had high assortment of food commodities including both local and imported maize meal, rice and wheat products. The urban markets had a steady supply of fresh produce, including leafy greens, sourced from both local farms and regional suppliers. However, availability was reported to be sometimes affected by transport logistics and weather conditions. (Table 2).

Prices in USD were generally stable when compared to the previous month for all food commodities with some significant decreases in kapenta (17%) and rice (10%) (Figure 9). This could be related to the stabilization of the inflation rates and increased seasonal production of kapenta.

In local currency, prices were stable across commodities save for flour, maize meal and eggs which rose by 25%, 11% and 9% respectively (Figure 8). The prices are 156% higher than prices 6 months ago. Rural markets seem to be using less of the local currency hence it is difficult to make conclusions on price changes.

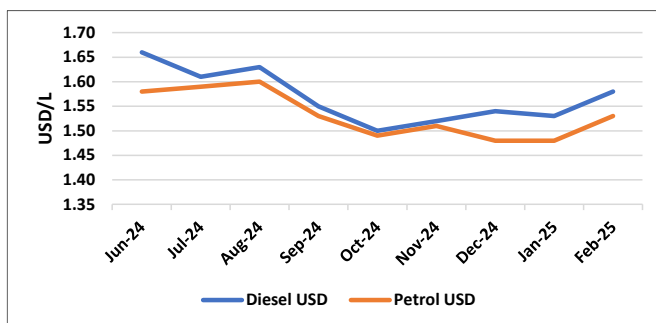
Table 2: Commodity prices in ZWG, USD and availability (%) in urban markets

ITEM	USD % price			ZWG % price		Jan Availability	Feb Availability
	Jan USD	Feb USD	change	Jan ZWG	Feb ZWG		
Maize Grain/Kg				-	-		
Maize Meal/Kg	0.70	0.69	-1%	26.00	28.96	11%	91
Sugar Beans/Kg	2.45	2.24	-8%	102.00	96.00	-6%	100
Vegetable Oil/L	1.93	1.87	-3%	73.00	75.00	3%	91
Rice/Kg	1.20	1.09	-10%	41.23	40.85	-1%	92
Salt/Kg	0.53	0.53	0%	27.45	23.00	-16%	98
Sugar/Kg	1.48	1.33	-10%	49.61	49.80	0%	100
Kapenta/Kg	13.20	10.93	-17%	448.00	391.38	-13%	82
Flour/Kg	1.05	1.00	-5%	34.00	39.00	15%	91
Chicken/Kg	4.50	4.52	0%	172.00	180.00	5%	40
Eggs/Kg	2.86	2.59	-9%	102.00	111.11	9%	78
Vegetables/Kg	1.00	0.97	-3%	35.00	30.00	-14%	50



Fuel price (USD and ZWG)

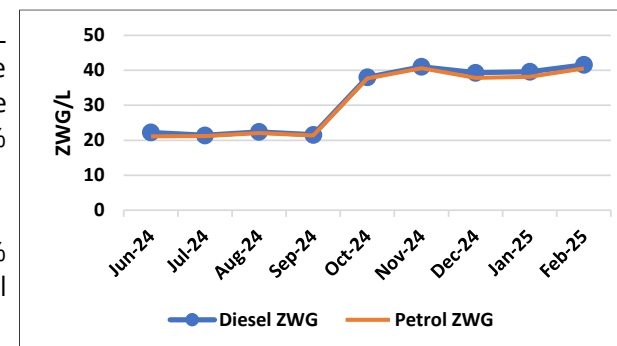
Figure 10: Fuel USD prices trends



The price of diesel and petrol was pegged at \$1.58/L and \$1.53/L respectively. The price is comparable to the January 2025 price (**Figure 10**). In comparison with the same time a year ago, the USD prices were 13% and 6% less for diesel and petrol respectively.

In local currency the February 2025 price of fuel was 5% and 6% higher than the January 2025 prices for diesel and petrol respectively (**Figure 11**).

Figure 11: Fuel ZWG price trends



Data Source: ZERA, 2025

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Non-food commodities (USD and ZWG)

Availability of soap remained stable in both rural and urban markets when compared to January 2025 (**Table 3**).

In local currency, the price of laundry soap increased by 8% in both rural and urban markets whilst the price dropped by 23% for bathing soap. (**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			
	Jan	Feb	Avail % change	Jan (\$)	Feb (\$)	% change \$		Jan (ZWG)	Feb (ZWG)	% change \$	
Laundry Soap Rural	96%	96%	0% ↔	\$ 1.28	\$ 1.23	-4%	↔	ZWD 35.43	ZWD 39.00	10%	↑
Laundry Soap Urban	98%	95%	-3% ↔	\$ 1.28	\$ 1.23	-4%	↔	ZWD 33.00	ZWD 35.00	6%	↑
Bathing Soap Rural	92%	98%	6% ↑	\$ 0.34	\$ 0.26	-23%	↓	ZWD 13.90	ZWD 9.44	-32%	↓
Bathing Soap Urban	100%	97%	-3% ↔	\$ 0.29	\$ 0.28	-3%	↔	ZWD 12.53	ZWD 10.89	-13%	↓



Methodology



Data for this reporting period, data was mainly collected between 1-28 February 2025 and is based on interviews with 47 traders of which 31 were in rural and 16 in urban districts. About 90% 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, PANAFRICARE, Plan International, Terre Des Hommes Italia, Welthungerhilfe and World Vision Zimbabwe.



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