Zimbabwe

April 2025

Food Security and Markets Monitoring Report

Situation Update

The Second Round Crops, Livestock and Fisheries Assessment (CLAFA-2, 2025) reports a strong recovery in Zimbabwe's agricultural sector, with total cereal production reaching 2,928,206 MT, driven by improved weather conditions and expanded cultivation of maize (up 6.4%) and drought-resistant traditional grains (pearl millet up 29%). Despite a national cereal surplus ranging from 811,732MT to 1,225,732 MT, some districts will require food assistance highlighting persistent regional disparities (CLAFA-2, 2025). The rebound underscores the success of climate-adaptive policies, but targeted interventions remain critical to address food distribution gaps.

On the economic front, Zimbabwe's annual inflation stood at 85.7% (April 2025), with a 0.6% monthly rise in local currency prices, while USD-denominated inflation remained low (0.2% monthly). The FAO Food Price Index rose 1% in April, influenced by higher cereal, dairy, and meat prices, though it remains 19.9% below its 2022 peak. Meanwhile, the Food Poverty Line (FPL) reached ZWG 862.06 per person, with the Total Consumption Poverty Line (TCPL) at ZWG 1,263.41, reflecting ongoing cost-of-living pressures despite agricultural recovery.

Highlights

In USD terms, the month on month inflation was 0.2% up from 0.1% while the annual inflation was 14.4% in April 2025. In local currency, the month on month inflation rate was 0.6% up from -0.1% in March 2025 (RBZ).

The seasonal rainfall performance has been characterised by mixed conditions but has concluded generally on a positive note with the country estimating surplus agricultural production (WFP Monitoring).

The CLAFA-2 report observed some improvements in crop, livestock and pasture conditions across the country due to significant rains received in both surplus and deficit– producing areas.

Maize meal was available in an average of 85% of the rural and urban markets. Other food commodities monitored were generally available in most markets (WFP Monitoring).

Price of food on the international market increased by 1% according to the FAO price index. The index stood at 128.3 points.

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 March 2025 (WFP Monitoring).

Food security situation and the progression of the rainfall season

The Second Round Crops, Livestock and Fisheries Assessment Report (CLAFA-2), conducted from 28 March to 07 April 2025, builds upon and finalizes the findings of the initial assessment (CLAFA-1) from February 2025, providing comprehensive estimates for crop production, livestock populations, and fisheries . The 2024/25 agricultural season began with below-normal rainfall due to a weak La Niña between October and November 2024. However, conditions improved significantly as La Niña strengthened in the latter half of the season, ensuring optimal planting and crop growth.

Total cereal production is projected at 2,928,206 metric tons (MT), with maize cultivation expanding by 6.4% to 1,839,373 hectares, surpassing the national target of 1.8 million hectares. Maize output is estimated at 2,293,556 MT, marking a 261% recovery from the previous El Niño-affected season. Meanwhile, traditional grains saw a 7% increase in planted area to 434,374 hectares, exceeding targets by 4%. Notably, pearl millet cultivation rose sharply by 29% to 251,265 hectares, reflecting a strategic shift towards drought-resistant crops. Production of traditional grains is estimated at 634,650 MT, comprising 436,784 MT of sorghum, 188,261 MT of pearl millet, and 9,605 MT of finger millet. Livestock conditions range from fair to good across the country (**Figure 3**)

According to CLAFA-2, the national cereal surplus ranges between 811,732 MT and 1,225,732 MT, depending on consumption patterns (**Figure 2**). While this indicates adequate grain availability at the national level, localized deficits persist. Gweru, Hwange, and Beitbridge are anticipated to face cereal shortages within the next 3 months and an additional ten districts (Kariba, Rushinga, Mudzi, Buhera, Mutare, Kwekwe, Mberengwa, Zvishavane, Chivi, and Mangwe) starting October 2025 (**Figure 1**). This disparity underscores the need for targeted interventions to address geographical imbalances in food distribution, ensuring vulnerable populations are not left behind despite overall production gains (CLAFA-2).

The strong recovery in crop production, particularly maize and drought-resistant grains, demonstrates the effectiveness of climate-adaptive agricultural policies. However, persistent regional food insecurity calls for enhanced logistical frameworks and social protection programs to bridge gaps in access. Moving forward, sustained investment in early warning systems, irrigation infrastructure, and farmer education will be critical to consolidating these gains and building long-term resilience against future climatic shocks.

Figure 1: Cereal sufficiency for rural wards (CLAFA-2)

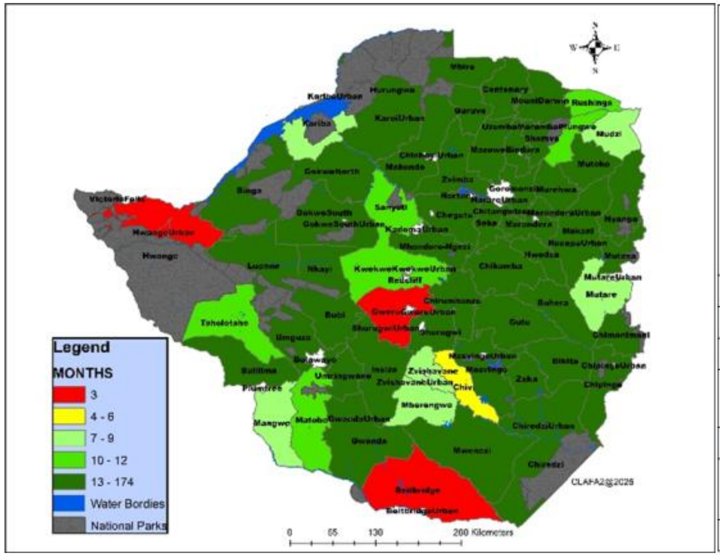
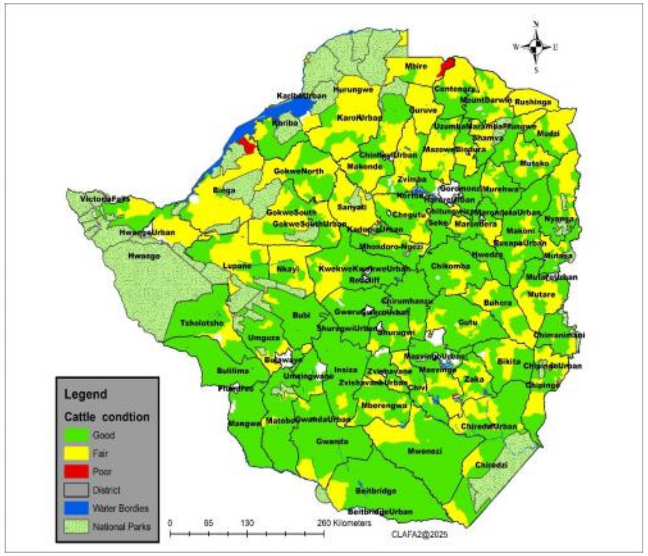


Figure 2: Cereal consumption scenarios (CLAFA-2)

	MLAFWRD Planning Production Scenario	SADC Regional Average Consumption	Zimbabwe Actual Consumption (2017)
	10 kg/pp/month	8.5 kg/pp/month	7.7 kg/pp/month
Human requirement (MT)	1,800,000	1,530,000	1,386,000
Livestock requirements (MT)	400,000	400,000	400,000
Total (MT)	2,200,000	1,930,000	1,786,000
SGR (Maize traditional grains and wheat)	83,526	83,526	83,526
Expected Cereal Production	2,928,206	2,928,206	2,928,206
Total Cereal (SGR & Expected Cereal Production)	3,011,732	3,011,732	3,011,732
Surplus/Strategic Grain Reserve	811,732	1,081,732	1,225,732

Figure 3: Cattle condition (CLAFA-**2)**



Macro-economic situation

In local currency, consumer prices in Zimbabwe rose by 0.6% month-on-month in April 2025, after a 0.1% decrease in March 2025 (**Figure 2**). According to the national statistics agency, the annual inflation rate stood at 85.7%. This marked the first annual inflation reading released since April 2024, following the introduction of the Zimbabwe Gold (ZWG)**.** ZimStat reported a USD month-on-month inflation rate of 0,2 percent in April 2025, compared to 0,1 percent in March (**Figure 1**). The USD CPI rose to 122,12 from 121,87 over the same period. Food prices in US dollars remained steady, while non-food items posted a mild increase of 0,3 percent. In a combined picture, the Weighted Consumer Price Index, which accounts for price changes in both US dollar and ZiG currencies, showed a month-on-month inflation rate of 0,3 percent in April 2025, up from 0,0 percent in March.

At the end of April 2025, the foreign currency exchange rate was pegged at ZWG26.82 to 1USD which is comparable to ZWG26.77 to 1USD recorded at the end of March, 2025. The parallel market exchange rate remained stable at about ZWG37.00 to 1 USD in April.

The FAO Food Price Index (FFPI) averaged 128.3 points in April 2025, up 1.2 points (1.0 percent) from March. Increases in the cereal, dairy and meat price indices outweighed decreases in those of sugar and vegetable oils. Overall, the FFPI was 9.0 points (7.6 percent) higher than its level a year ago but remained 31.9 points (19.9 percent) below its peak reached in March 2022.

According to ZimSTAT, the Food Poverty Line (FPL) for one person in April 2025 was ZWG 862.06. The Total Consumption Poverty Line (TCPL) for one person was ZWG 1,263.41 in April 2025. This means that an individual required that much to purchase both non-food and food items as at April 2025 in order not to be deemed poor.

Figure 4: Inflation rates (USD)

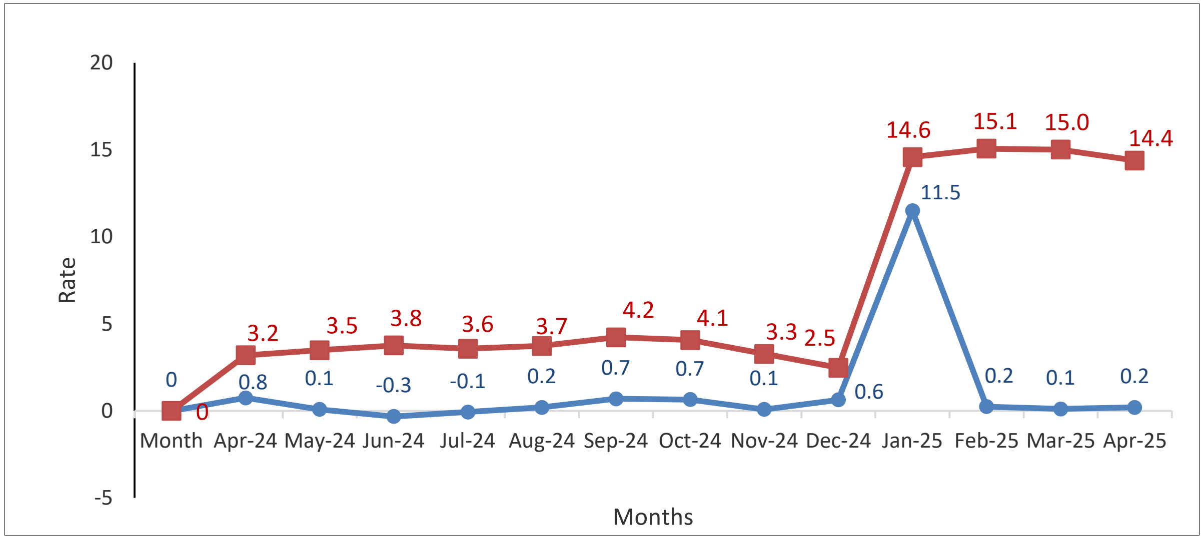
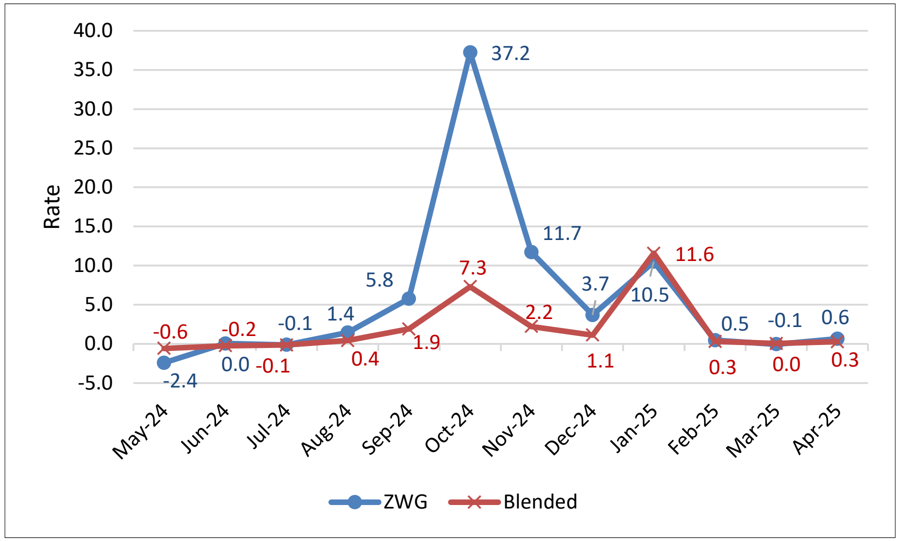


Figure 5: ZWG and Blended inflation



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 $22.06 which is comparable to $22.93 recorded in March 2025. The April 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 ZWG899.96 in April 2025 which is comparable to ZWG898.58 in March 2025.

Figure 6: Rural USD food price % change (Month-on month)

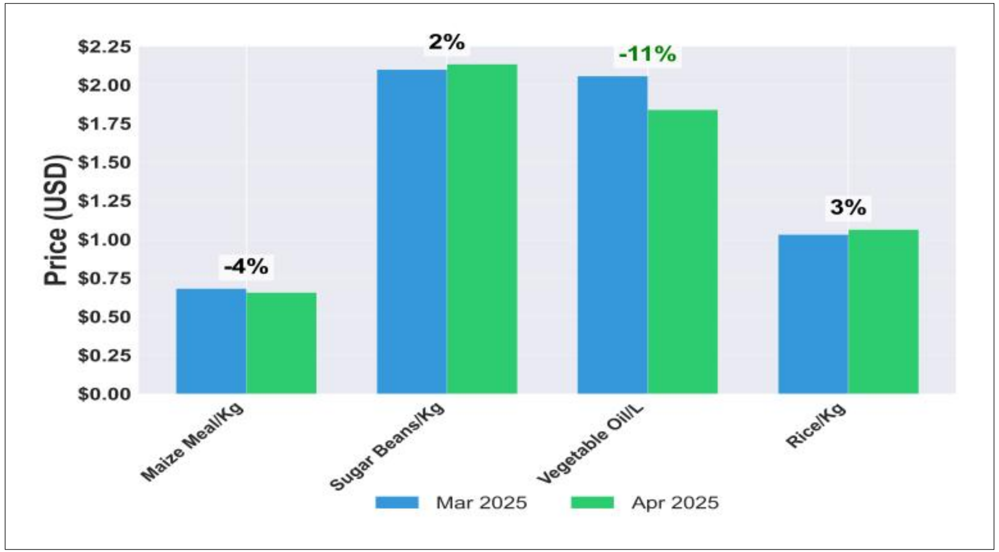
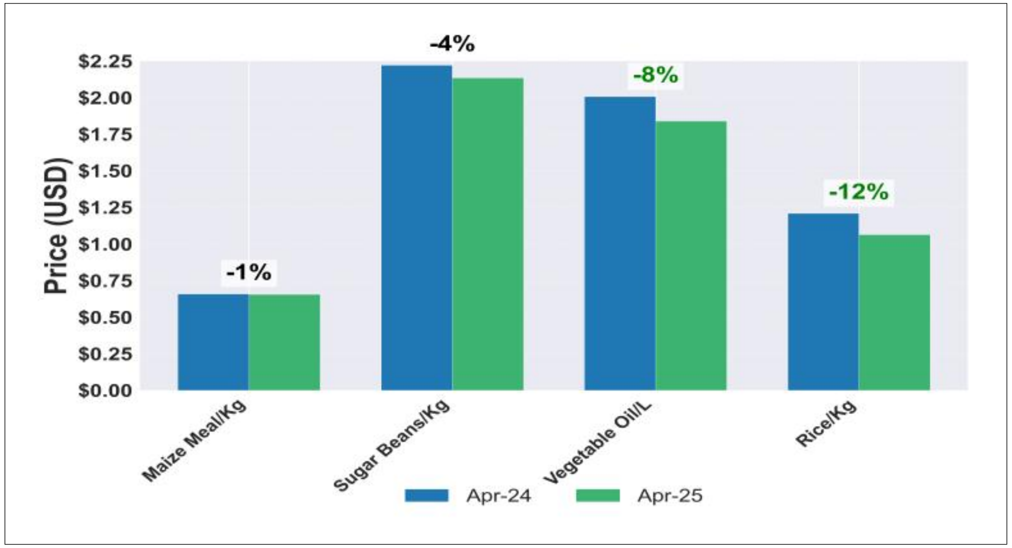


Figure 7: Rural USD food price % change (Year-on-year)



Availability of most commodities remained high and comparable to availability in March 2025 (**Table 1**). Maize meal, the primary staple, is available in shops (80%). Rice, another key cereal is available in all the monitored markets. The supply is high and stable for vegetable oil (100%) as well.

Month-on-month the price of food commodities remained stable in both USD and ZWG. The USD price of vegetable oil decreased by 11% after what seems to be a temporary spike in March 2025. The price stability is further evidence of the low inflation rate observed for the USD (**Figure 6 and Table 1**).

Year-on-year the price of food commodities remained stable and for some commodities the price significantly decreased. The price of vegetable oil (-8%) and rice (-12%) decreased significantly. (**Figure 7**).

Table 1: MEB commodity prices in USD and ZWG and availability.

ITEM	Mar USD	Apr USD	USD % price change	Mar ZWG	Apr ZWG	ZWG % price change	Mar Availability	Apr Availability
Maize Grain/Kg								
Maize Meal/Kg	0.68	0.66	-4%	25.95	26.00	0%	88	80
Sugar Beans/Kg	2.10	2.13	2%	96.00	100.00	4%	59	55
Vegetable Oil/L	2.06	1.84	-11%	90.00	90.00	0%	95	100
Rice/Kg	1.03	1.06	3%	40.71	41.85	3%	98	100
Salt/Kg	0.59	0.54	-9%	25.00	25.00	0%	97	100
Sugar/Kg	1.39	1.40	1%	53.82	54.67	2%	100	100
Kapenta/Kg	10.13	11.47	13%	390.00	400.00	3%	84	50
Flour/Kg	1.00	1.00	0%	36.23	37.74	4%	96	98
Chicken/Kg	3.50	3.47	-1%	140.00	140.00	0%	5	12
Eggs/Kg	2.78	2.70	-3%	111.67	110.97	-1%	48	50
Vegetables/Kg	1.00	0.80	-20%	25.00	20.00	-20%	5	12
Full MEB	22.93	22.06	-4%	898.58	899.96	0%	70	69

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 USD24.13 which is stable when compared to USD24.36 reported in March 2025. Compared to a year ago, the USD cost of the basket was stable. In local currency the cost was estimated at an average price of ZWG809.85 which is stable when compared to ZWG818.80 in March 2025.

Figure 8: Urban USD food price % change (Month-on month)

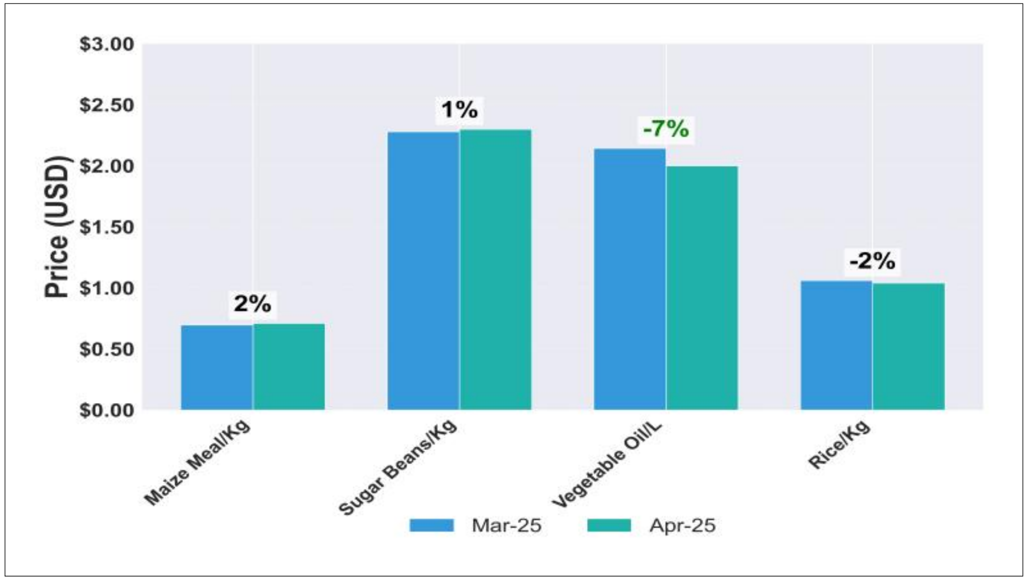
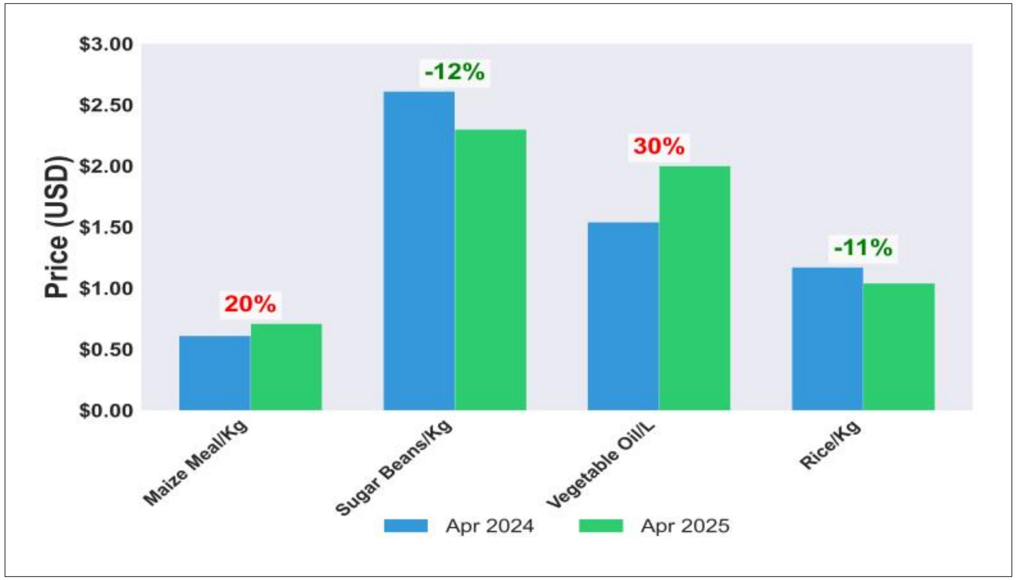


Figure 9: Urban USD food price % change (Year-on-year)



Maize meal, the primary staple, was generally available in urban markets reported by 91% of the monitored traders. The urban markets had high assortment of food commodities including both local and imported maize meal, rice and wheat products. (**Table 2**).

Month-on-month the price of maize meal remained unchanged over the period. Similarly, sugar beans and rice maintained the same price in both months. Vegetable oil experienced a notable decrease in April 2025 after what seems to be a temporary spike in the month of March (**Figure 9**). The price stability could be related to the stabilization of the inflation rates.

Year-on-year maize meal was 20% higher and vegetable oil was 30% higher. Sugar beans (-12%) and rice (-11%) saw a price decrease year on year. (**Figure 9)**. In local currency prices seem to follow a similar pattern of stability although evidence from markets monitoring indicate that rural and urban markets seem to be using less of the local currency hence it is difficult to make conclusions on price changes.

Table 2: MEB commodity prices in USD and ZWG and availability

ITEM	Feb USD	Mar USD	USD % price change	Feb ZWG	Mar ZWG	ZWG % price change2	Feb Availability	Mar Availability
Maize Grain/Kg				-	-			
Maize Meal/Kg	0.70	0.71	2%	21.10	21.92	4%	91	91
Sugar Beans/Kg	2.28	2.30	1%	81.92	83.45	2%	93	93
Vegetable Oil/L	2.14	2.00	-7%	72.00	72.00	0%	98	98
Rice/Kg	1.06	1.04	-2%	34.65	35.00	1%	96	96
Salt/Kg	0.55	0.56	3%	24.00	25.00	4%	100	100
Sugar/Kg	1.36	1.40	2%	47.42	47.83	1%	91	91
Kapenta/Kg	10.10	10.23	1%	390.00	399.00	2%	91	91
Flour/Kg	1.00	1.03	3%	30.73	31.05	1%	91	91
Chicken/Kg	4.50	4.47	-1%	175.00	175.00	0%	35	35
Eggs/Kg	2.78	2.69	-3%	112.31	110.00	-2%	74	74
Vegetables/Kg	1.00	0.87	-13%	30.00	20.00	-33%	39	39
Full MEB	24.36	24.13	-1%	818.80	809.85	-1%	82	82

Fuel price (USD and ZWG)

Figure 10: Fuel USD price trends

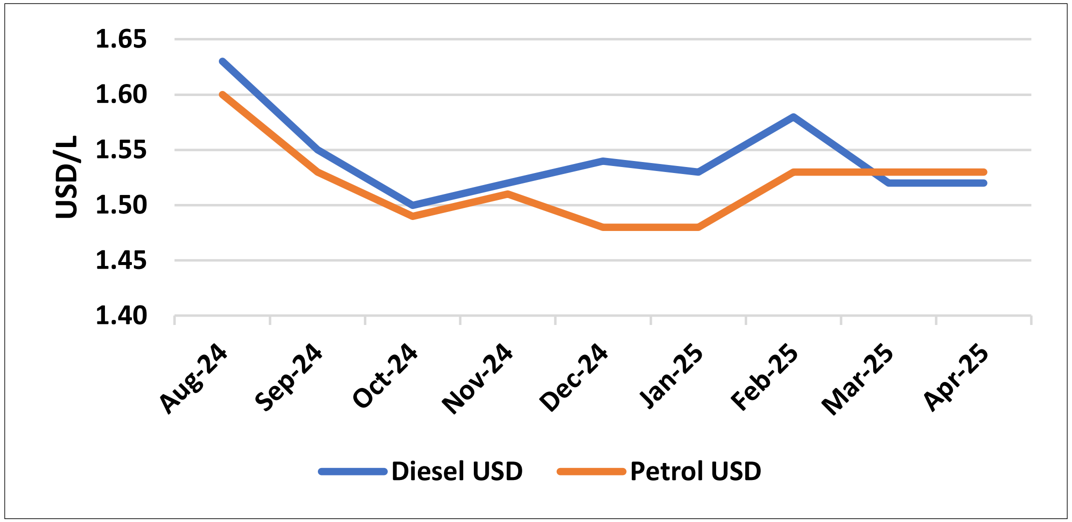
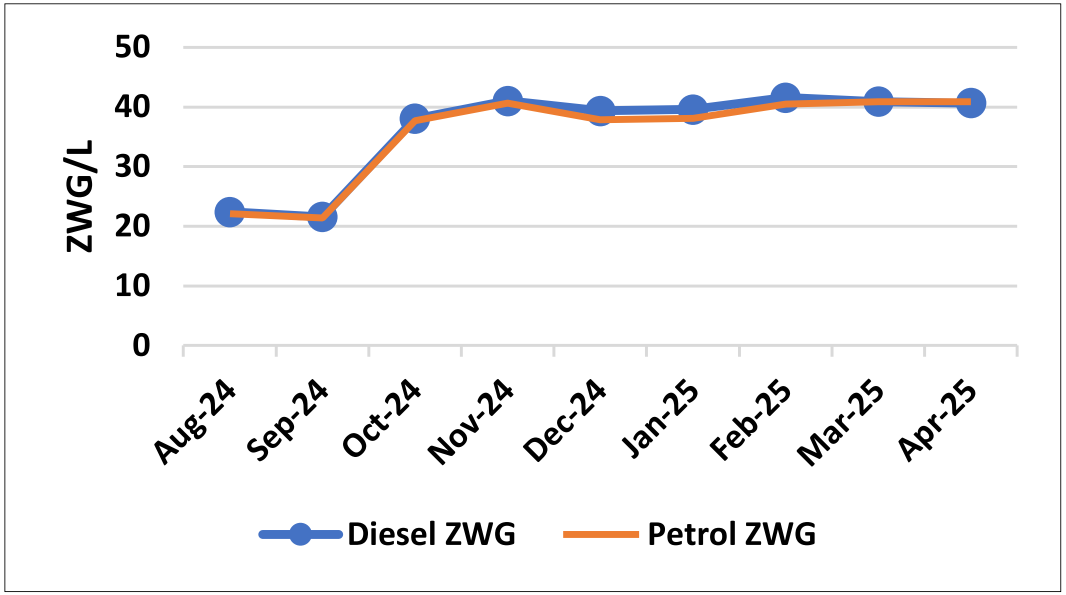


Figure 11: Fuel ZWG price trends



Data Source: ZERA, 2025

The price of diesel and petrol was pegged at $1.52/L and $1.53/L respectively. The price is similar to the March 2025 price (**Figure 10**). In comparison with the same time a year ago, the USD prices were 10% and 5% less for diesel and petrol respectively.

In local currency the April 2025 price of fuel remained stable at $40.65/L diesel and $40.92/L for petrol (**Figure 11**).

Methodology

Data for this reporting period, was mainly collected between 1-30 April 2025 and is based on interviews with 37 traders of which 27 where in rural and 10 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 months data:

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

For further information

Barbara CLEMENS, WFP Representative and Country Director — Barbara.Clemens@wfp.org

Ifeoma MADUEKEGARBA, Head of External Relations — ifeoma.maduekegarba@wfp.org

Website: wfp.org/countries/zimbabwe

Twitter: twitter.com/WFP_Zimbabwe

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