

## Food Security and Markets Monitoring Report

### Situation Update

Zimbabwe's food security outlook showed notable improvement in July 2025, driven by an above-average harvest, stable local currency, and several resilience interventions happening across the country. Field monitoring across districts revealed widespread availability of staple commodities in both rural and urban markets, with maize meal accessible in about 97% of locations and prices remaining stable or lower than last year. Livestock conditions also improved, supported by climate-smart breeding, vaccination campaigns, and drought mitigation efforts.

Economic indicators remained relatively steady, with the local currency maintaining value and inflation showing moderate month-on-month increase. Remittances, cash crop sales, and village business units continued to support household incomes, as observed in areas in different provinces. Despite these gains, challenges persist for youth and women in accessing productive resources, underscoring the need for speeding up inclusive support and targeted interventions.



### Highlights



Zimbabwe recorded a month-on-month inflation increase of 1.6% in local currency terms in July 2025, up from 0.3% in June. Annual inflation reached 95.8%, reflecting continued price pressures despite relative currency stability.



Government and partner interventions, including borehole drilling and drought mitigation centres, helped protect the national cattle herd during the lean season. Climate-smart livestock programs and decentralised veterinary services were observed in districts Matabeleland South province.



Income-generating activities improved across districts, with record tobacco and cotton sales boosting household earnings across provinces. Village Business Units managed by women and youth also contributed to local incomes and employment.



Food commodities were widely available in both rural and urban markets. Maize meal was accessible in 97% of monitored markets, with rice, wheat, vegetable oil, and sugar beans also consistently stocked.



Food prices remained largely stable in both USD and ZWG terms, with maize meal, sugar beans, and rice showing year-on-year decline. Fuel prices increased slightly month-on-month but were lower than the same time last year.



Globally, the FAO Food Price Index rose to 130.1 points in July 2025, a 1.6% increase from June.



## Food security situation

Throughout the month of July, field monitoring teams across Zimbabwe observed some evidence of recovery and transition in terms of food security. Following the devastating El Niño-induced drought in 2024, particularly in southern districts such as Beitbridge and Mwenezi, signs of resilience and adaptation are emerging. The government and its partners' interventions—ranging from borehole drilling to the establishment of drought mitigation centres—have been instrumental in protecting the national cattle herd in the southern regions for example.

In districts across Matabeleland North and South, WFP monitoring noted the rollout of climate-smart livestock breeding programs and intensified vaccination campaigns against diseases such as blackleg and lumpy skin disease. Weekly dipping and pest control measures were being enforced, with veterinary officers now more accessible due to decentralised services and realignment of their roles. These efforts are not only preserving livestock but also restoring confidence among rural farmers who rely heavily on cattle for income and draught power.

Meanwhile, the 2025 harvest has brought a wave of optimism. In Mashonaland West and Central, households reported improved food access due to the above-average maize and cotton yields. In the major markets accessed (Mbare musika and Kudzanai), maize grain prices were between 30% and 40% lower than in July 2024. A reduction in staple (maize meal) price was observed in most of the other rural and urban markets across both surplus and deficit-producing areas. This price drop has significantly improved food access for poor households, across provinces.

In Mashonaland regions and the Midlands, tobacco farmers recorded high sales of the cash crop. Cotton farmers in these areas also reported an increase in seed cotton sales. These cash crops have bolstered household incomes, enabling families to invest in education, health, and small businesses.

Village Business Units (VBUs) continue to transform rural livelihoods. In some districts in the country, VBUs powered by solar irrigation, generated significant amounts of money from its first harvest. Managed by local women and youth, the units supply fresh produce like green pepper and cabbage to nearby markets. In Mashonaland Central, VBUs are enabling communities to irrigate winter maize and vegetables, with produce sold to Mbare Musika and local supermarkets. These initiatives are not only improving nutrition but also creating employment and reducing rural poverty.

Winter wheat farming is another area of progress. In districts in Midlands and Mashonaland East, the government's ambitious plan of winter wheat is well underway. Farmers are benefiting from prioritised electricity supply to irrigation clusters, rainwater harvesting training, and access to mechanisation. The Zimbabwe Electricity Transmission and Distribution Company (ZETDC) and Zimbabwe National Water Authority (ZINWA) are working closely with farmers to ensure uninterrupted irrigation.

Remittances remain vital for food security in the country. According to the Reserve Bank of Zimbabwe, diaspora remittances increased by 8.4% in the first half of 2025, compared to last year. These funds are supporting families in both rural and urban areas, particularly in Matabeleland South and Masvingo, where youth unemployment and limited economic opportunities persist. However, monitors noted that many young people, especially women, still face barriers to accessing capital and land, limiting their participation in agriculture and enterprise.

To build on these gains, it is recommended that the government and partners scale up support for VBUs, especially in dry regions like Matabeleland North and South, where solar-powered irrigation has proven effective. Expanding access to affordable inputs and mechanisation for smallholder farmers, particularly women and youth, will enhance productivity and income. Strengthening district-level monitoring systems will ensure timely data collection and response, especially in food-insecure areas like Chivi and Binga. By aligning these efforts with Vision 2030, Zimbabwe can ensure that no community is left behind.



Macro-economic situation

In July 2025, Zimbabwe recorded a month-on-month increase in consumer prices of 1.6% in local currency terms, an increase compared to the 0.3% rise noted in June 2025 (**Figure 2**). Data from the national statistics office indicates that annual inflation was measured at 95.8%, representing the fourth annual inflation figure (April 2025 at 85.7%, May 2025 at 92.1% and June at 92.5%) released since the launch of the Zimbabwe Gold (ZWG) in April 2024. Meanwhile, ZimStat reported a marginal increase in month-on-month inflation in US dollar terms, registering 0.3% for July 2025, up from -0.2% in June 2025 (**Figure 1**). Taken together, the Weighted Consumer Price Index — which reflects combined price movements in both USD and ZiG — recorded 0.6% in July 2025, up from -0.1% in the previous month.

By the close of July 2025, the official exchange rate stood at ZWG26.79 per USD, largely unchanged from ZWG26.95 per USD at the end of June 2025. The parallel market exchange rate remained steady at approximately ZWG37.00 per USD during the same period.

Globally, the FAO Food Price Index (FFPI) averaged 130.1 points in July 2025, marking an increase of 2.1 points (1.6 percent) from June 2025. While the price indices for cereals, dairy and sugar declined, they were outweighed by increases in the indices for meat and vegetable oils. Overall, the FFPI was 9.2 points (7.6 percent) higher than in July 2024, yet remained 30.1 points (18.8 percent) below its peak reached in March 2022 (144.5 points).

The reported higher Minimum Expenditure Basket (MEB) cost in rural areas (ZWG 885.12) compared to urban areas (ZWG 766.56) (Rural and urban market performance update pages) is most likely due to heavy reliance on the markets for the rural populace reflecting poor harvests and very limited diversity in terms of crops grown. The rural populace heavily relies on the market for the staple, vegetable oil, sugar beans, sugar, salt, floor and rice which are some of the key MEB commodities. These commodities sell at a higher price than the urban markets due to additional transport costs and

Figure 1: Inflation rates (USD)

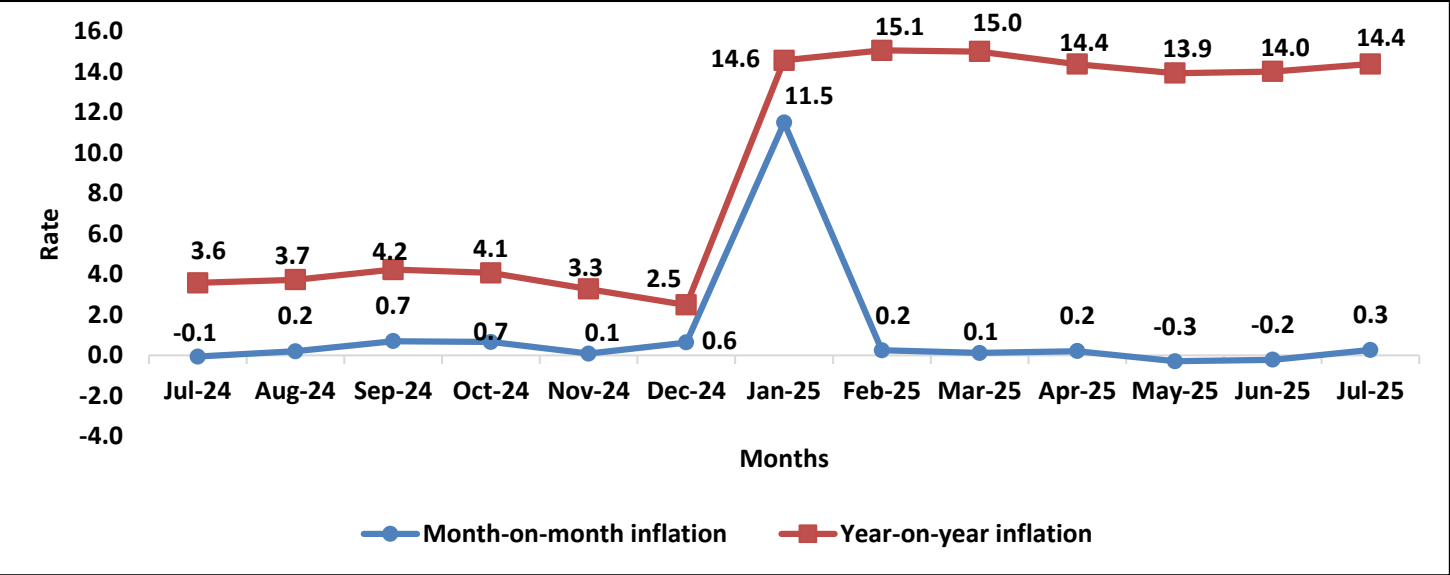
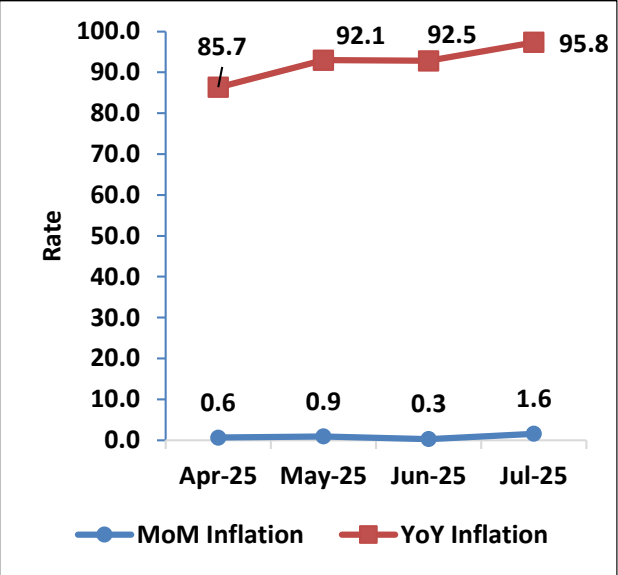


Figure 2: ZWG inflation



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)

In July 2025, the USD value of the Minimum Expenditure Basket (MEB) — which reflects the minimum cost for a household to meet essential needs — averaged USD 20.35, remaining broadly similar to the June 2025 estimate of USD 20.64. The July 2025 MEB cost in USD was approximately 13 percent lower than six months prior and 15 percent below the level recorded in the same month of 2024. In local currency terms, the MEB cost remained stable at ZWG 885.12 in July 2025.

Figure 3: Rural USD food price % change (Month-on month)

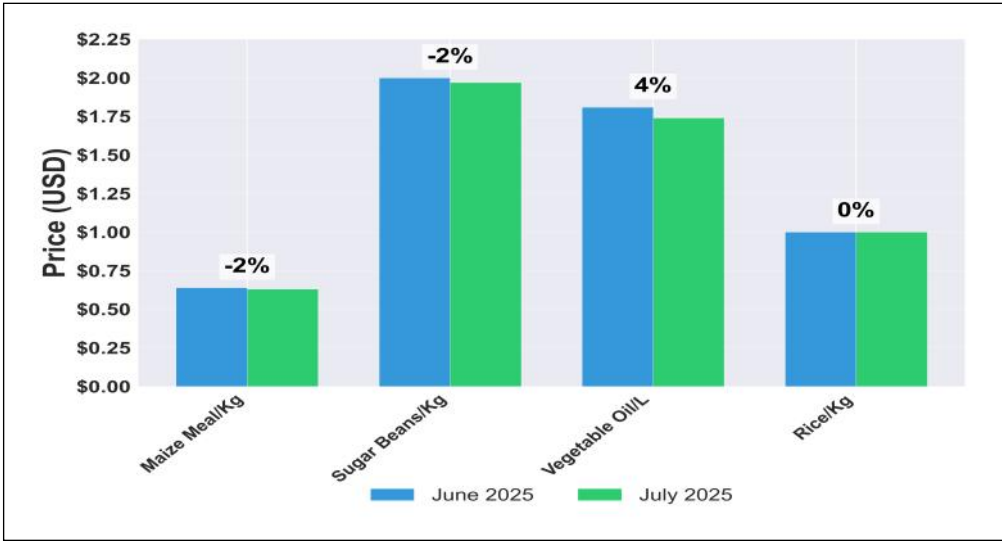
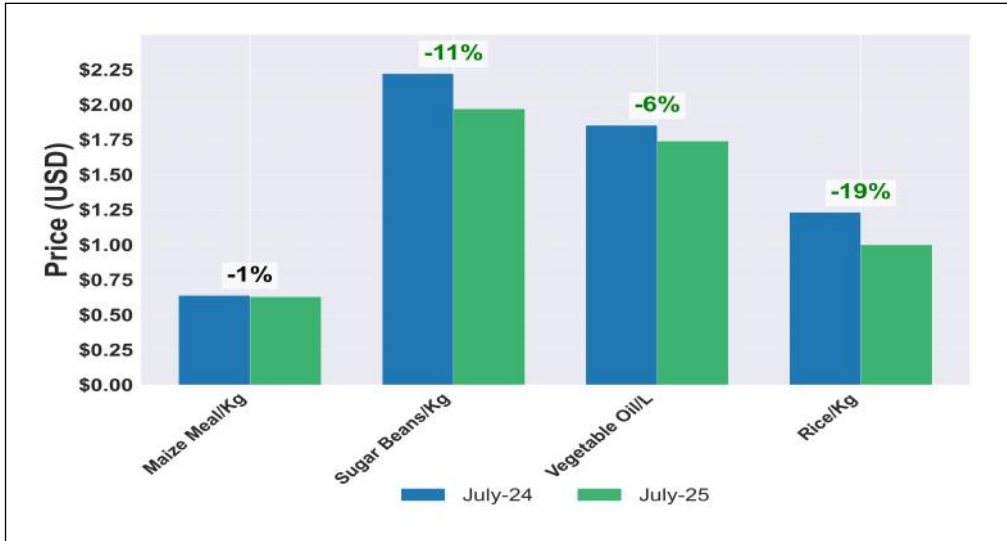


Figure 4: Rural USD food price % change (Year-on-year)



Food commodities are generally available across Zimbabwe’s rural markets, supported by the above-average 2025 harvest and stable local currency. (**Table 1**). Maize meal, the primary staple, was accessible through an estimated 95 percent of traders, while rice and wheat, the other key cereals, were reported available in all monitored markets. The supply of vegetable oil remained high and steady across markets (100 percent). Availability of sugar beans stood at 88 percent, supported by increased own production and farmer-to-farmer sales following the harvest. Maize grain was predominantly traded directly between farmers, with prices ranging from USD 4 to USD 8 per 20-litre bucket.

On a month-on-month basis, food commodity prices remained largely stable in both USD and ZWG terms (**Figure 3 and Table 1**). Although maize meal (staple) prices are stable compared to same time last year, they remain 11% more than the 5 year average (\$0.55/kg).

Compared to the same period last year, food commodity prices were generally stable, with notable year-on-year declines for some items due to increased supply. (**Figure 4**).

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

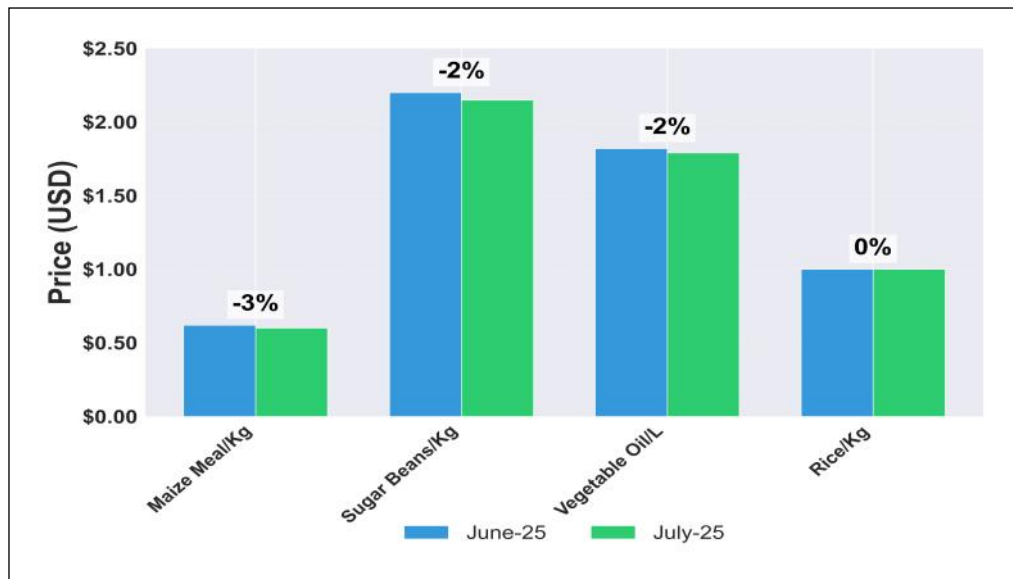
ITEM	June USD	July USD	USD % price change	June ZWG	July ZWG	ZWG % price change	June Availability	July Availability
Maize Grain/Kg								
Maize Meal/Kg	0.64	0.63	-2%	27.00	28.00	4%	90	95
Sugar Beans/Kg	2.00	1.97	-2%	97.00	95.00	-2%	67	88
Vegetable Oil/L	1.81	1.74	-4%	75.00	73.00	-3%	100	100
Rice/Kg	1.00	1.00	0%	34.00	33.00	-3%	100	100
Salt/Kg	0.51	0.50	-2%	19.00	20.00	5%	100	100
Sugar/Kg	1.38	1.35	-2%	51.00	50.00	-2%	100	100
Kapenta/Kg	11.58	11.50	-1%	398.00	400.00	1%	65	70
Flour/Kg	1.00	1.00	0%	34.00	35.00	3%	100	100
Chicken/Kg	3.29	3.19	-3%	140.00	140.00	0%	45	50
Eggs/Kg	2.70	2.78	3%	110.00	114.00	4%	50	50
Vegetables/Kg	0.50	0.50	0%	19.00	19.00	0%	50	50
Full MEB	20.64	20.35	-1%	877.62	885.12	1%	79	82



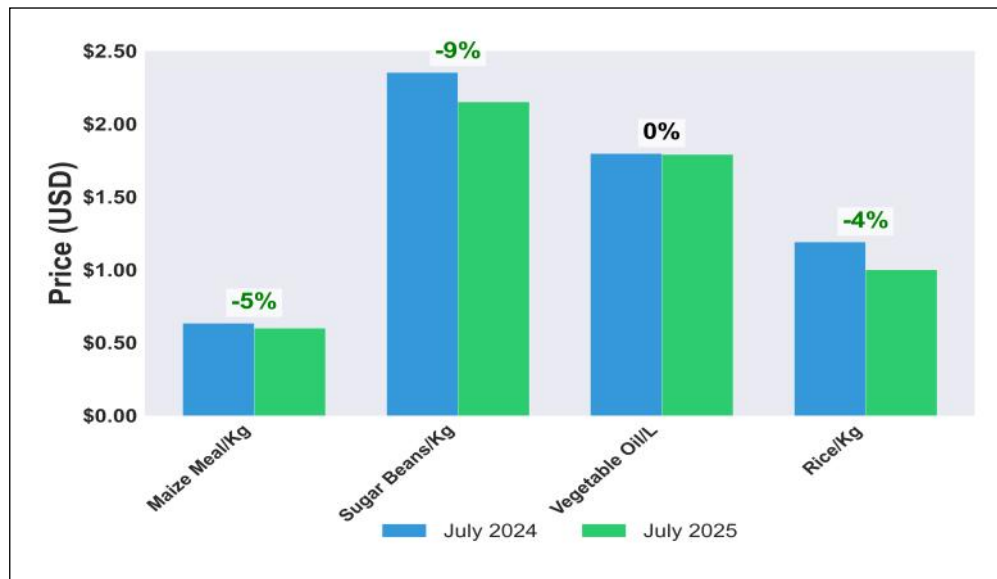
## Urban Market Performance Update: a review of availability and prices of basic food basket commodities (ZWG and USD)

In urban markets, the average cost of the full Minimum Expenditure Food Basket (MEB) in USD was estimated at USD 21.13 in July 2025, 4% below the USD 21.94 recorded in June 2025. Year-on-year, the USD cost of the basket has remained relatively stable. In local currency terms, the MEB was priced at an average of ZWG 766.56 in July 2025, showing stability when compared to ZWG 798.02 in June 2025.

**Figure 5:** Urban USD food price % change (Month-on month)



**Figure 6:** Urban USD food price % change (Year-on-year)



Food commodities in Zimbabwe's urban markets are generally available, with maize meal accessible in about 95% of monitored locations. Other essential food items were also widely present, supported by surplus agricultural production and stable prices in both USD and ZWG terms. Urban markets continued to offer a broad assortment of food commodities, including both domestically produced and imported maize meal, as well as rice and wheat products (**Table 2**).

Month-on-month, maize meal prices remained stable most likely due to the stable economy. A similar trend was observed for the other food commodities (**Figure 5**).

On an annual basis, maize meal prices were 5 percent lower, sugar beans 9 percent lower and rice 4 percent lower compared to July 2024 (**Figure 6**). Local currency price trends appear broadly stable. Market monitoring suggests an improvement in the use of local currency (about 20%) although it remains lower than expected (100%) and lower the USD use. The price for maize meal (\$0.60/kg), although stable on a year-on-year basis remains elevated averaging about 9% above the 5 year price average (\$0.55/kg).

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

ITEM	USD % price			ZWG % price		June Availability	July Availability
	June USD	July USD	change	June ZWG	July ZWG		
Maize Grain/Kg				-	-		
Maize Meal/Kg	0.62	0.60	-3%	21.38	20.00	-6%	95
Sugar Beans/Kg	2.20	2.15	-2%	83.97	80.00	-5%	90
Vegetable Oil/L	1.82	1.79	-2%	70.00	70.00	0%	100
Rice/Kg	1.00	1.00	0%	33.00	34.00	3%	100
Salt/Kg	0.50	0.50	0%	21.00	20.00	-5%	100
Sugar/Kg	1.29	1.25	-3%	45.67	45.00	-1%	100
Kapenta/Kg	12.46	12.30	-1%	400.00	395.00	-1%	87
Flour/Kg	1.00	1.00	0%	33.00	34.00	3%	100
Chicken/Kg	4.00	3.89	-3%	165.00	160.00	-3%	54
Eggs/Kg	2.60	2.57	-1%	113.00	110.00	-3%	90
Vegetables/Kg	0.75	0.60	-20%	21.00	20.00	-5%	50
Full MEB	21.94	21.13	-4%	798.02	766.56	-4%	88





## Fuel price (USD and ZWG)

Figure 7a and 7b: Diesel (top) and petrol (bottom) USD price trends

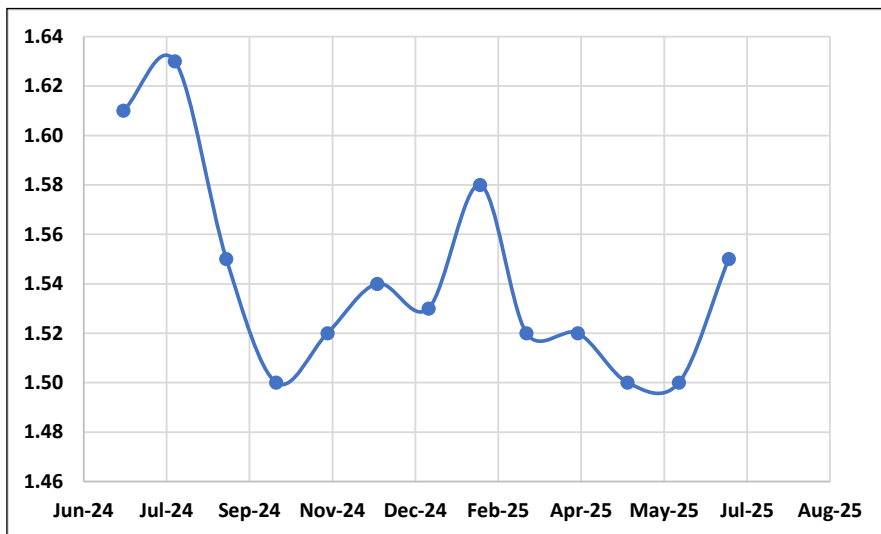
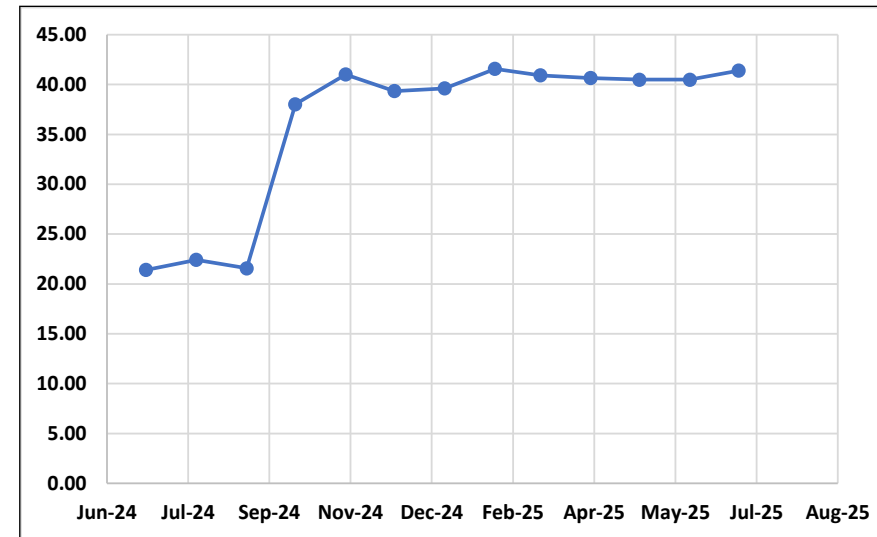


Figure 8a and 8b: Diesel (top) and petrol (bottom) ZiG price trends



The price of diesel and petrol was pegged at \$1.55/L (3% up from \$1.50/L) and \$1.56/L (1% up from \$1.54/L) respectively (**Figure 7**). In comparison with the same time a year ago, the USD prices were 4% and 2% less for diesel and petrol respectively. The fuel price stability has contributed to relatively stable transport cost which is likely to have contributed to the month-on-month and year-on-year price stability of food commodities. (rural and urban market performance page).



## Methodology



Data for this reporting period, was mainly collected between 1-31 July 2025 and is based on interviews with 55 traders (19 markets) of which 25 were in rural and 30 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:

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



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