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# FOOD SECURITY MONITORING REPORT

January 2021

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# Highlights



During the month of January 2021, the country recorded its highest daily confirmed COVID-19 cases of above 1,000 since the outbreak of the pandemic in the country in March 2020 . The cumulative number of confirmed cases increased by more than 58% from 13,867 cases including 363 deaths on 31 of December 2020 to 33,271 cases including 1,193 deaths by 31 of January 2021 .



The Government of Zimbabwe reintroduced lockdown measures of level 4 on January 06, 2021. The initial 30-day period was extended by a further 15 days up to the 15<sup>th</sup> of February 2021 and the situation will be reviewed during the month of February.



Parts of the country received above normal rainfall during the month of January, leading to water logging in some parts of the country. Crop and livestock condition was reported to be good in most districts with harvest expected to start in April.



A slight increase in annual inflation was observed from 349% recorded in December 2020 to 363% in January after it has been on a downward trend since August 2020. Food inflation remains the main driver of inflation in the country, which increased from 346% in December to 369% in January 2021.



The Hunger Map for Zimbabwe for the month of January 2020 continued to reflect an improvement in the estimated number of people experiencing very high prevalence of insufficient food consumption, from the 5.54 million people reported during the last week of December to 4.9 million during the last week of January 2021. The improvement is linked to an increase in the coverage of food assistance, an increase in agricultural labour opportunities and availability of local produce from green harvest among other factors.



Supply of maize grain on the formal markets remained critically low, estimated to be available in only 4% of monitored markets, while availability of maize meal increased from an average of 61% in December to 72% in January.



In ZWL terms, prices increased by an average of **11%** in comparison to those reported in December 2020. Specifically, maize grain increased by **9%**, maize meal by **12%**, sugar beans by **11%** and cooking oil by **13%**.



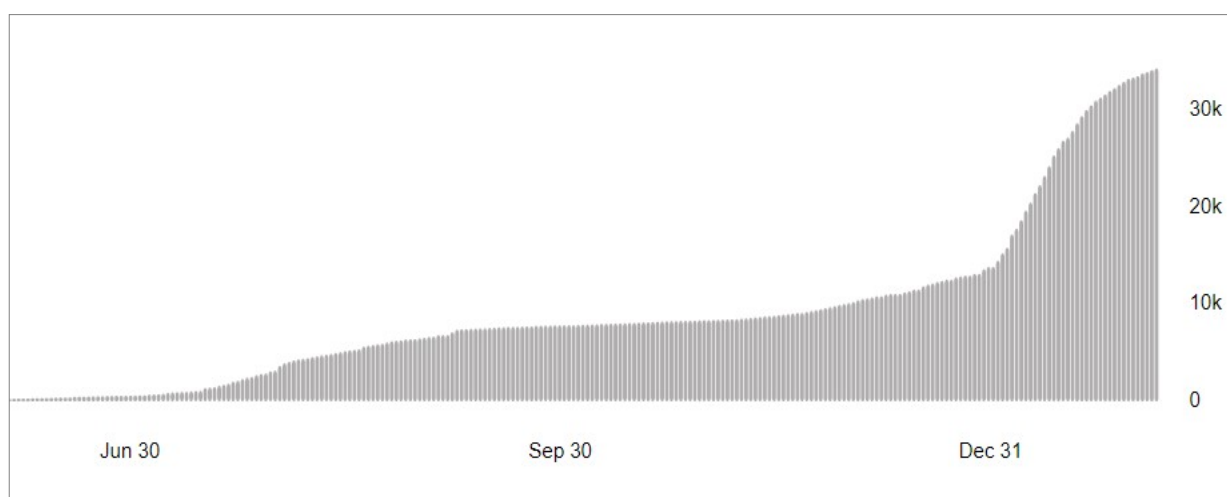
Prices in USD increased by an average of 9% compared to December 2020 with highest prices increases reported for maize meal (12%) and vegetable oil (10%).

# 1. Update on the COVID-19 Situation

Zimbabwe recorded its highest daily confirmed COVID-19 cases in January reaching above a thousand daily cases from 06 January 2021, up from an average of 300 cases reported in December 2020. The cumulative number of confirmed cases increased by more than **58%** from 13,867 cases including 363 deaths on the 31<sup>st</sup> of December 2020 to 33,271 cases including 1,193 deaths by the 31<sup>st</sup> of January 2021 (**Figure 1**). The situation further deteriorated with the number of cumulative cases rising to reaching 34,785 including 1,353 deaths by 10 of February 2021. Harare continues to report the highest number of daily cases followed by Bulawayo, Masvingo, Mashonaland west and Mashonaland East (Ministry of Health Zimbabwe). Globally the number of daily new Covid 19 cases continues to increase from 82.4 million cases on the 31<sup>st</sup> of December 2020 to 106.6 million by 10 February 2021 (<https://covid19.who.int/>).

Starting from the 5<sup>th</sup> of January, the government reintroduced a 30-day lockdown restrictive measures at level 4, which resulted in both formal and informal businesses not categorized under essential services. The government further extended the lockdown period by another 15 days up to 15 February 2021 and the situation will be reviewed during the month of February. The main impact of the lockdown measures on households is the reduction in livelihood activities and potential income. Vulnerable urban households have been the worst affected by these measures as they tend to rely more on informal markets for both income and access to both food and non-food items. Agricultural activities were allowed to continue hence rural households are able to continue with some of their livelihood activities including casual laboring—the main source of income for the poor and vulnerable households.

**Figure 1:** Confirmed cumulative COVID-19 cases for Zimbabwe (31 March 2020 to 10 February 2021)



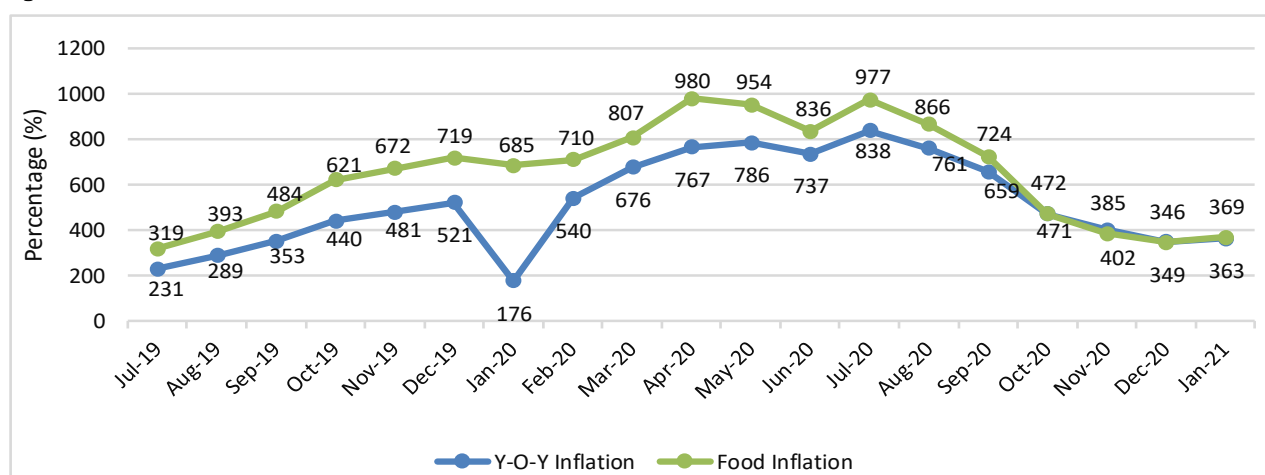
**Source:** WHO

## 2. Macro-Economic Situation Update

A steady improvement in macro economic conditions has been recorded over the past few months with a notable decline in annual and food inflation since July 2020, when the rates peaked at 838% and 977% respectively (**Figure 2**). However, in January 2021, an marginal increase in annual inflation was reported from 349% in December 2020 to **363%** (**Figure 2**). Food inflation, which remains the main driver of inflation in the country, also recorded a slight increase from 346% in December 2020 to **369%** in January 2021. The consumer price index increased by **5.43%** in January compared to the previous months (<https://dataviz.vam.wfp.org/Hunger-Analytics-Hub>).

Although recently stabilized, inflation remains high in comparison to other countries in the region, and continues to erode the purchasing power of vulnerable households. The Government of Zimbabwe explained that the price increases observed during the month of January 2021 were linked to increases in fuel prices among other factors, and is working with trader association to find a solution.

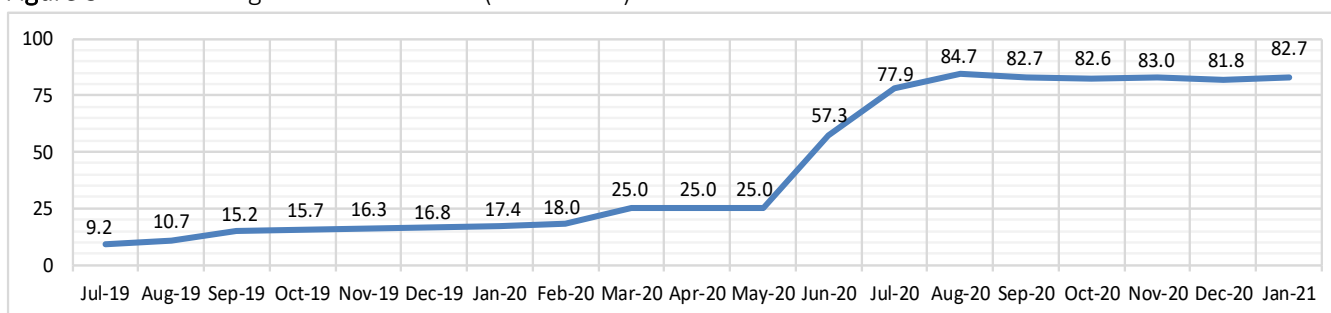
**Figure 2: Zimbabwe Inflation Trends 2019 – 2021**



Source: RBZ

The official exchange rate was relatively stable over the month of January, slightly increasing from ZWL81.79:1USD at the start of the month to ZWL82.68:1USD on the 31<sup>st</sup> of January 2021 (**Figure 3**).

**Figure 3: RBZ Exchange rates 2019-2021 (1USD: ZWL)**



Source: RBZ, 2021

### 3. Food and Nutrition Security Situation and Updates from HungerMap Live Monitoring

The World Food Programme conducts weekly data collection through mVAM remote monitoring and the findings are summarised at Provincial level in a live hunger map and weekly snapshots (<https://hungermap.wfp.org/>). According to this data source, there was an improvement in the number of people experiencing very high prevalence of insufficient food consumption from 5.54 million at the end of December 2020 to 5.1 million on 11 February 2021, representing a decrease of 0.44 million people during this period (figure 4).

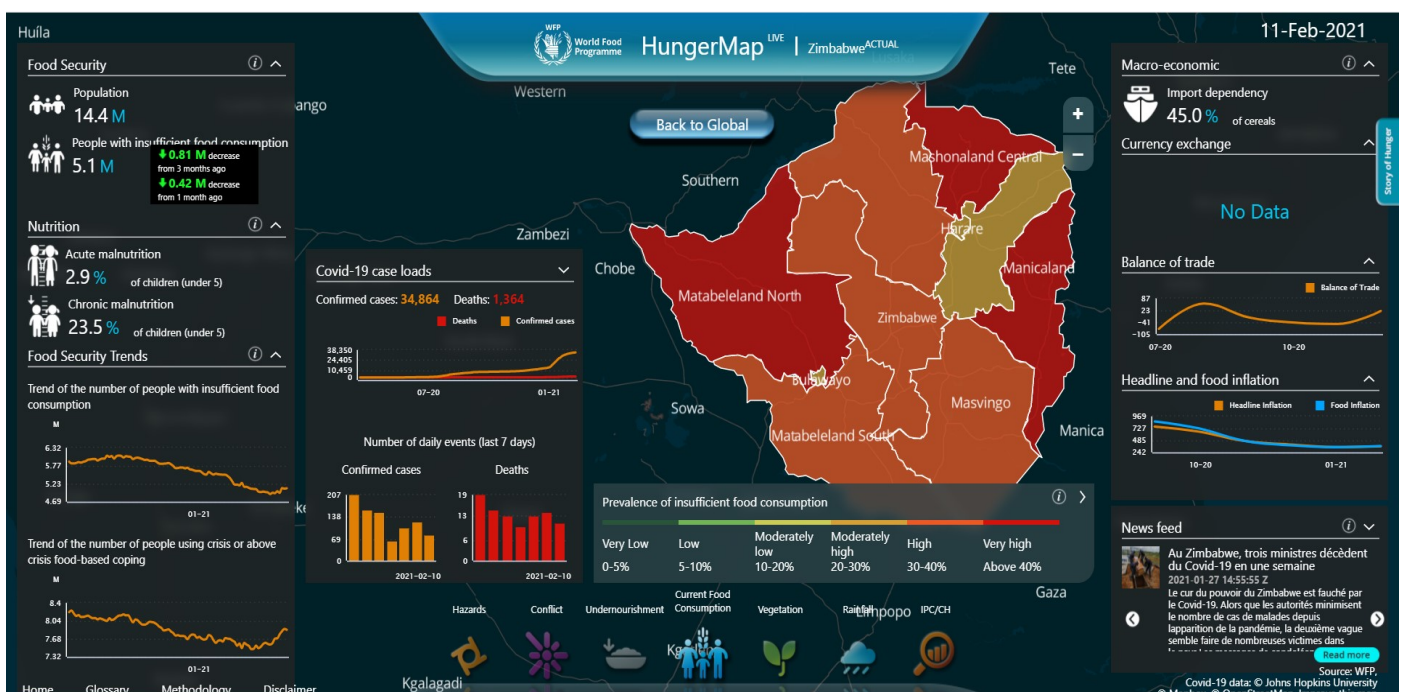
The general improvement in the number of people experiencing very high prevalence of insufficient food consumption when compared to October, which had an estimation of above 6 million can be attributed to a number of factors including:

- ◆ relaxation of lockdown measures in September through the start of January, leading to increased livelihood activities and household incomes;
- ◆ A promising agricultural season due to favorable rainfall conditions, and subsequent increase in the consumption of green harvest from the early planted crops, coupled with an increase in indigenous vegetables and fruits thereby improving dietary diversity and consumption patterns;
- ◆ scaling up of food assistance coverage by the government, WFP and partners in both urban and rural areas during this period thereby improving household food security outcomes.

The number of households resorting to crisis or emergency livelihood coping strategies was estimated at 2.83 million during the last week of the month. Lack of money remained the main barrier faced by households in accessing markets (9.4%) and health services (6.3%) during last week of January 2021.

**Figure 4: Zimbabwe Hunger Map**

Source: <https://hungermap.wfp.org/>



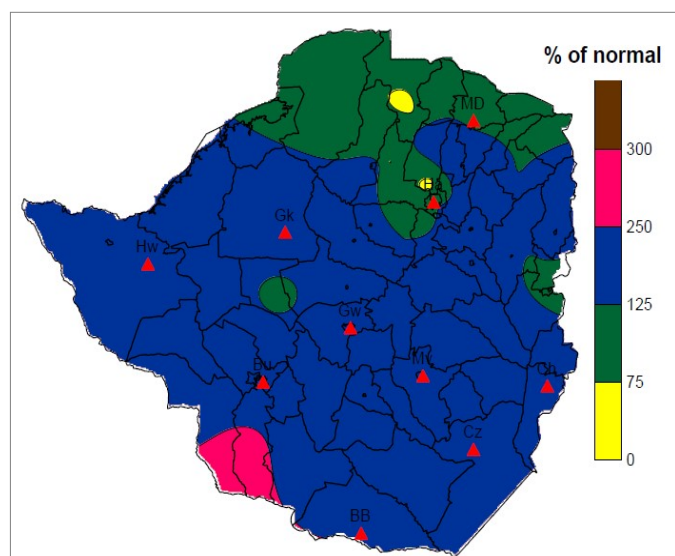


## 4. Rainfall Season Update

According to the Meteorological Department, most parts of the country received accumulated rainfall above 125% of their normal rainfall by the 3<sup>rd</sup> of February 2021 (**Figure 5**). Area planted is generally higher when compared to last season with exception of Nkayi and Mangwe where it was reported to be below 50% by end of January 2020. Crop condition was reported to be mainly good in most parts of the country with the maize crop mainly reported to be at early to late vegetative stage hence harvest is likely to start in April (according to WFP and partners monitoring). The reports from the field observations on crop condition are in tandem with the satellite images on crop performance as measured by the Water Retention Satisfaction Index (WRSI). WRSI is an indicator of crop performance based on the availability of water for crops during a growing season and it showed that most of the planted maize crop was in very good condition (**Figure 6**). Crops are also reported to be affected by the Fall Army Worm were received from some districts across the country e.g. Hwange, Nkayi, Insiza, Bikita, Chivi, Chiredzi, Kwekwe, Redcliff, Mudzi, Muzarabani, Rushinga and Chegutu. More information on the Fall Army Worm will be provided in the next bulletin after consultations with the Ministry of Agriculture and FAO.

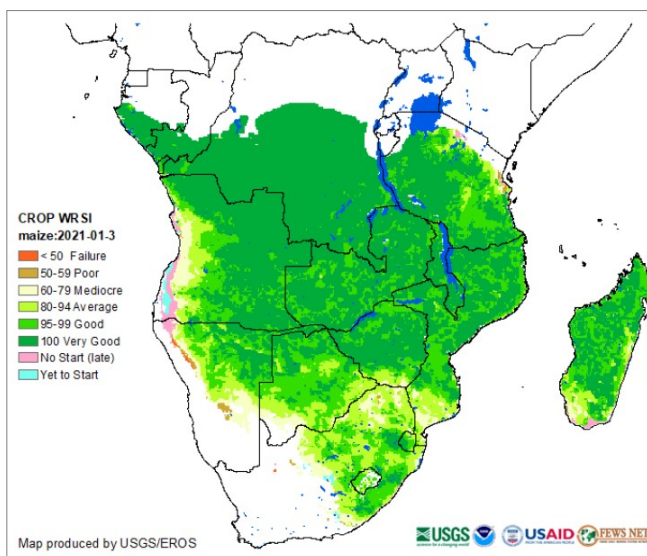
The annual First Round Crop and Livestock Assessment by the Ministry of Agriculture, Rural and Land Resettlement, is currently under way and results are expected to be released at the end February 2021. This report will provide more details on area planted, crop condition and status.

**Figure 5:** Accumulative Rainfall percent of normal: October—3 February 2021



Source: Meteorological Department of Zimbabwe

**Figure 6:** Water Requirement Satisfaction Index Extended: Dec 2020 Dekad 3



Poor availability of top dressing fertilizer was reported to be affecting potential harvest given the excessive rains received in some parts of the country. Water logging was also reported mainly in the southern districts with some crops especially maize grain reported to be showing signs of nutrient deficiencies.

The main cropping activities currently ongoing include cultivation and application of top fertilizers, which generates increased casual labour opportunities for vulnerable households. Livestock condition was also reported to be good as a result of the improvement in pasture quality and availability. Livestock deaths were reported mainly in Mwenezi and Chivi (548 and 9 respectively) and the major reasons include lumpskin, 3-day stiff sickness and Theilenosis.

### 3. Market Performance Update

This section provides a summary of commodity availability and prices for both rural and urban markets covering maize grain, maize meal, sugar beans and vegetable oil. This bulletin provides mainly the national picture in comparison to the trends. For a more detailed analysis of rural and urban markets separately please refer to the Monthly Market Monitoring Report for January.

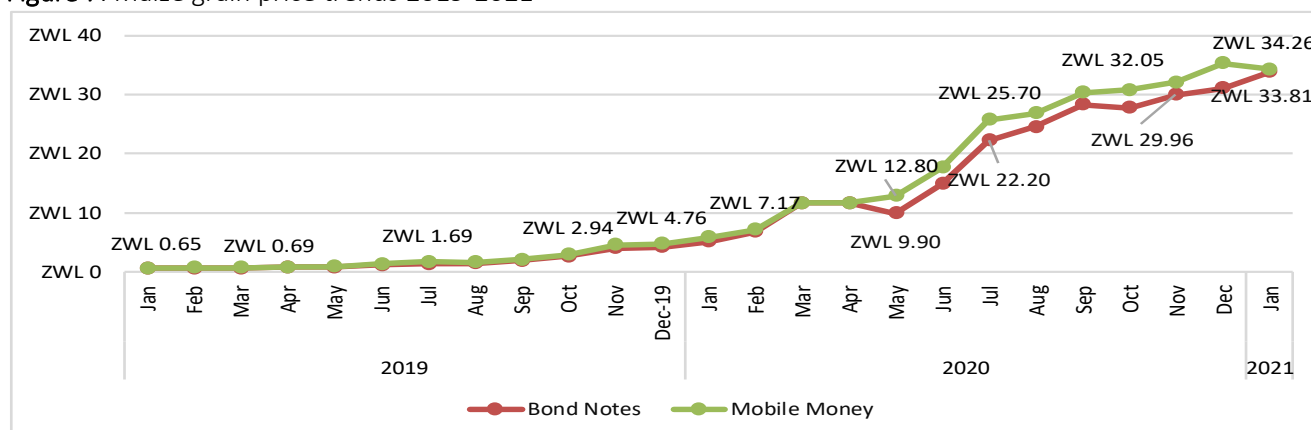
Availability of maize grain remains critically low in markets across the country, reported to be sold in only 4% of the markets monitored. However, with the harvest expected to start in April, the situation is likely to improve. Other WFP basket food commodities were generally available with **69%** of all monitored markets reporting availability of maize meal, **72%** reporting availability of sugar beans, and **90%** reporting availability of vegetable oil in January. In ZWL terms, prices of the commodities under review increased by an average of **11%**. Specifically, the average reported price of maize grain increased by **9%**, maize meal by **12%**, sugar beans by **11%** and cooking oil by **13%**. Prices in USD terms increased by an average of **9%** with the highest increases reported for maize meal (**12%**) and vegetable oil (**10%**). On average, mobile money payments attracted a premium of 3% higher than the bond notes prices, a decrease from 6% reported last month.

#### Maize grain availability and price in ZWL terms

Availability of maize grain remains critically low on the formal market estimated at an average of **4%** of the markets monitored, a situation similar to that reported in December and slightly lower than the **9%** reported same time last year. Compared to two years ago in January 2019 when the commodity was available in **49%** of the markets, the current availability is critically poor. Availability was slightly higher in urban markets at an average of **5%** of the markets compared to **3%** for the rural markets.

Maize grain prices were collected from at least one market in 4 rural districts and 8 urban centers over the month of January 2021, and the prices reflect formal transactions while informal transactions which include farmer-to-farmer sales and mobile traders were not captured by the market survey. The commodity was selling at an average price of ZWL33.81 for bond notes, an increase of about **9%** in comparison to ZWL31.03/kg reported in December (**Figure 7**). Compared to same time last year, the price has increased by more than **560%** from an average of ZWL5.08/kg. Mobile money payments attracted an average premium of **4%**, although most traders reported not accepting this form of payment for the commodity.

**Figure 7:** Maize grain price trends 2019-2021



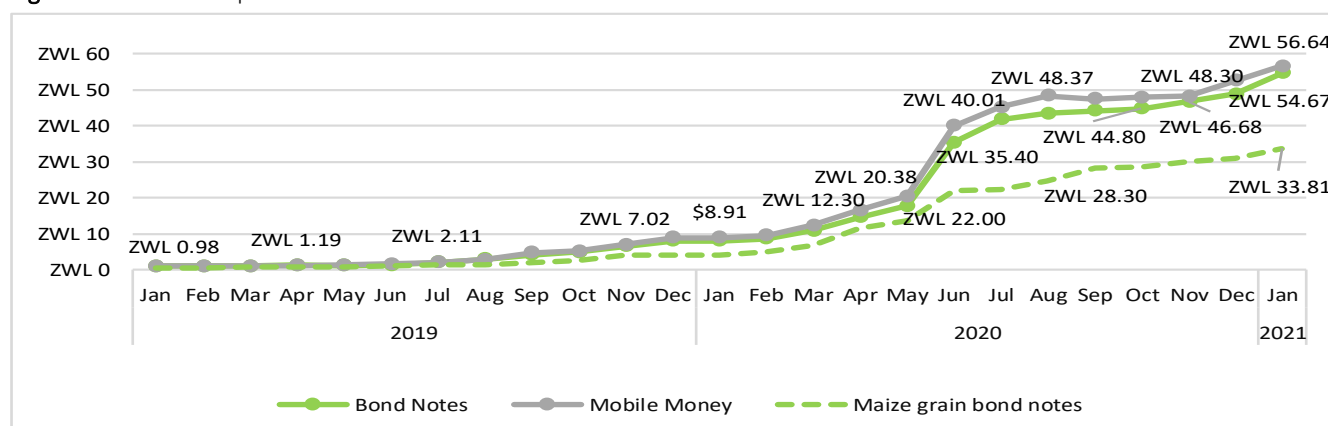
Source: Harmonized Markets Monitoring



## Unrefined maize meal availability and prices in ZWL terms

Unrefined maize meal was available in **72%** of monitored markets, an increase of **11 percentage points** when compared to **61%** reported in December 2020. Higher availability was reported in urban markets at an average of **79%** of the markets compared to **57%** of the rural markets. The commodity was selling at an average price of ZWL54.67/kg for bond notes an increase of 12% compared to ZWL48.80/kg reported in December 2020. Although maize meal was readily available compared to maize grain, the commodity cost on average **57%** higher, hence the reason why vulnerable households prefer maize grain. Compared to same time last year in January 2020, the price of the commodity increased by about **580%** from ZWL8.02/kg and by more than 5000% when compared to two years ago i.e. January 2019, when the commodity sold at an average price of ZWL0.98/kg (**Figure 8**). Mobile money payments were charged at an average of ZWL56.64/kg, a price **4%** higher than that for bond notes.

**Figure 8:** Maize meal price trends 2019-2021

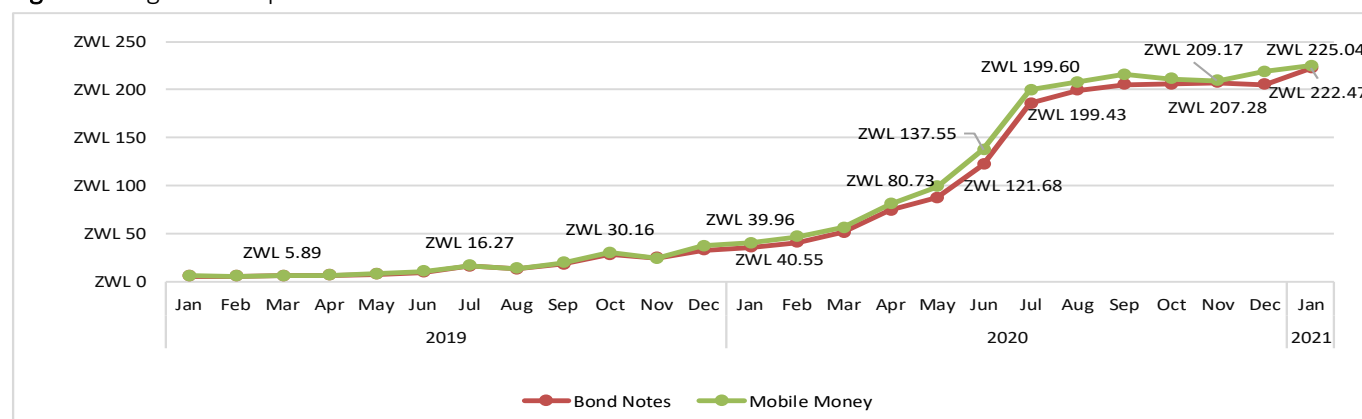


Harmonized Markets Monitoring

## Sugar beans availability and prices in ZWL terms

Sugar beans supply remained stable, with **72%** of the surveyed markets reporting availability, continuing the trend from the previous month. As supplies from local production continues to increase on the formal market, the availability of the commodity is likely to increase. The commodity was selling at an average price of ZWL222.47/kg, a price which is **11%** higher than ZWL205.18/kg reported in December 2020 (**Figure 9**). When compared to January 2020, the price for the commodity increased by almost **528%** from an average of ZWL35.40/kg. For mobile money payments, the commodity was selling at an average price of ZWL225.104/kg almost similar to the bond notes price.

**Figure 9:** Sugar beans price trends 2019-2021



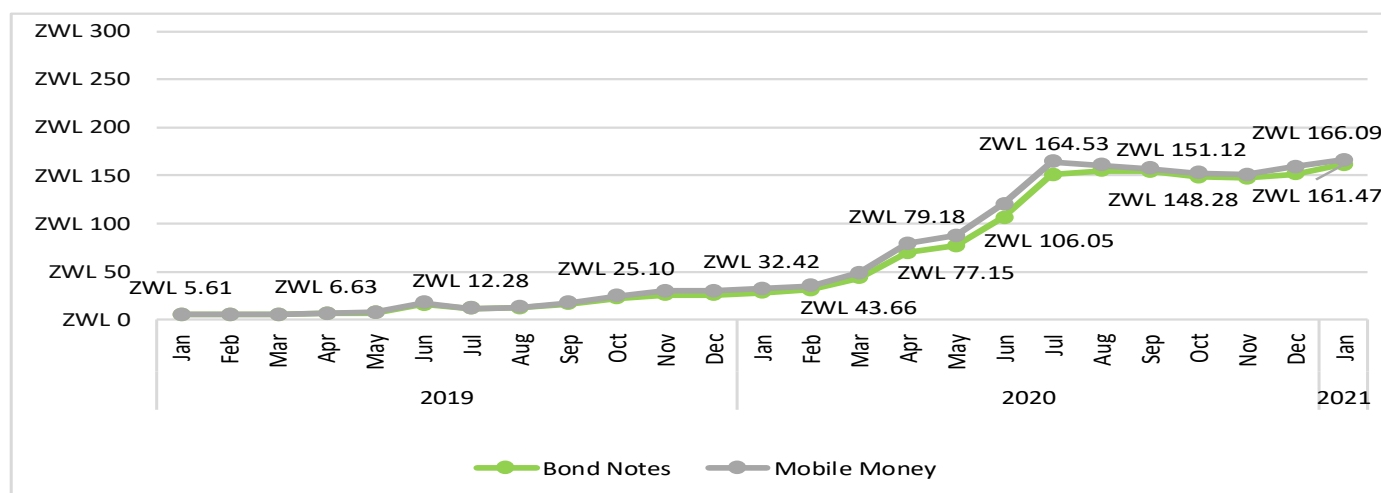
Source: Harmonized Markets Monitoring

### 3. Market Performance Update

#### Vegetable oil availability and prices in ZWL terms

Vegetable oil supply remained high and stable with an average of **90%** of the surveyed markets reporting availability, with no significant differences between rural and urban markets. In bond notes payments, the commodity was selling at an average price of ZWL167.48/L, an increase of **13%** compared to ZWL147.75/L in December 2020. The average price for mobile money payments was ZWL166.09/L, a price 3% higher than that of bond notes (**Figure 10**).

**Figure 10:** Vegetable oil price trends 2019-2021



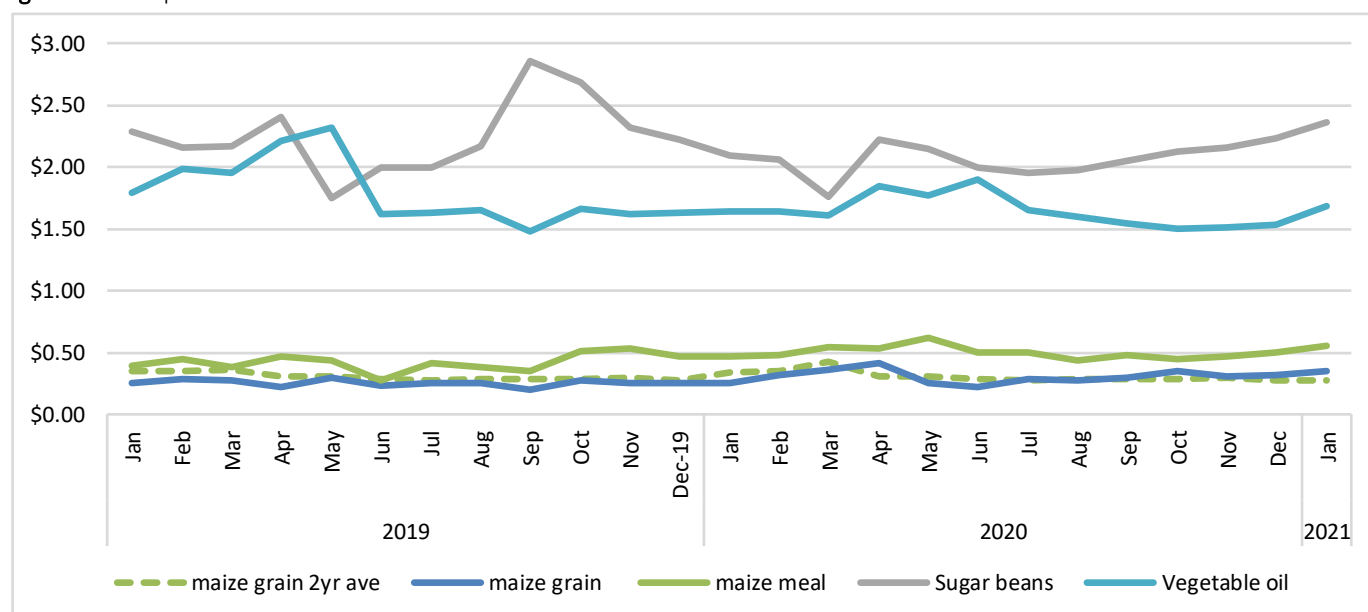
Source: Harmonized Markets Monitoring

#### Food Commodity Prices in Foreign Currency

The prices of the monitored food commodities in USD increased by an average of **9%** in USD terms. Current average maize grain price of \$0.35/kg, is **9%** higher than \$0.32/kg reported in December. The price for the commodity had been stable since July 2020 (6 months ago). However, the observed increase when compared to December is typical at this time of the year as prices are usual at their highest during the peak of the lean season. The current price is **17%** higher than the 2yr average of \$0.30/kg (**Figure 11**). The price of the commodity is likely to decrease with the coming in of the harvest.

Unrefined maize meal sold at an average price of \$0.56/kg, a price which is **12%** higher than \$0.50/kg reported in December 2020 and **17%** against the 2yr average of \$0.48/kg. Maize meal price is about **60%** higher than that of maize grain. Sugar beans sold at an average USD price of \$2.36/kg which is **6%** higher than \$2.23/kg recorded in December and **4%** higher than the 2yr average \$2.26/kg. Vegetable oil was selling at an average price of \$1.69/L, a price 10% higher than \$1.53/L reported in December 2020 and stable against the 2yr average of \$1.7/L.

**Figure 11:** USD price trends for the food basket commodities



Source: Harmonized Markets Monitoring

## 4. Recommendations

Among the key recommendations emanating from the analysis above include;

- ◆ Continue monitoring the food and nutrition security situation in the country against the impacts of COVID-19 restrictive measures and the recently observed price increases.
- ◆ Continue monitoring the seasonal performance of rainfall, crop growth and development, and livestock conditions as the season progresses.
- ◆ The availability of maize grain continues to be poor, therefore there is need to:
  - to monitor maize grain imports;
  - continue assessing feasibility and best modality of assistance by geographical level;
  - conduct a comprehensive study to understand the market linkages with source markets.

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