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FOOD AND AGRICULTURE ORGANIZATION OF THE UNITED NATIONS, ROME



WORLD FOOD PROGRAMME, ROME

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Acronyms and Abbreviations

A1	Newly settled small farms (A1 model)
A2	Newly settled medium to large farms (A2 model)
ACWG	Agriculture Cooperation Working Group
Agritex	Department of Agricultural Technical and Extension Services
CA	Communal Agriculture sector
CFSAM	Crop and Food Security Assessment Mission
CFU	Commercial Farmers Union
CHS	Community and Household Surveillance
CMNSS	Combined Micronutrient and Nutrition Surveillance Survey
CPI	Consumer Price Index
CSB	Corn-Soya-Blend
CSO	Central Statistics Office
DDF	District Development Fund
DMC	Drought Monitoring Committee
EIU	Economist Intelligence Unit
EU	European Union
FAO	Food and Agriculture Organization of the United Nations
FFW	Food-for-Work Programme
GDP	Gross Domestic Product
GMB	Grain Marketing Board
HBC	Home-Based Care
IOM	International Organization for Migration
LSCF	Large-Scale Commercial Farm
MAMID	Ministry of Agriculture, Mechanization and Irrigation Development
MVP	Mobile Vulnerable Populations
NDVI	Normalized Difference Vegetation Index
OPV	Open-Pollinated Varieties
OR	Old Resettlement sector
OVC	Orphans and Vulnerable Children
PMP	Public Maintenance Programme
PPP	Purchasing Power Parity
RBZ	Reserve Bank of Zimbabwe
SADC	Southern African Development Community
SSCF	Small-Scale Commercial Farm
STERP	Short-Term Emergency Recovery Programme
VGf	Vulnerable Group Feeding
WFP	World Food Programme
WHO	World Health Organisation
ZDHS	Zimbabwe Demographic and Health Survey
ZFNC	Zimbabwe Food and Nutrition Council
ZFU	Zimbabwe Farmers Union
ZimVAC	Zimbabwe Vulnerability Assessment Committee

Mission Highlights

- National production of maize in 2009 is estimated at 1.14 million tonnes, an increase of 130 percent on that of the record low harvest of 2008. Total domestic cereal availability for 2009/10 is estimated to be 1.39 million tonnes. This includes a forecast production of winter-season wheat of about 12 000 tonnes, the lowest ever and dramatically down from 242 000 tonnes in 2006. Wheat farming is plagued with the high cost of production relative to returns (especially non-payment for last year's crop), the shortage of financial liquidity, and the uncertainty of electricity supply for irrigation.
- Generally well-distributed rainfall ensured significantly better cereal production this year than last, in spite of the fact that inputs such as improved seeds, fertilizer, fuel and draught power were in short supply and expensive.
- With the total utilization of cereals at about 2.07 million tonnes including 1.74 million tonnes for direct human consumption for the revised projected population of 11 million, the resulting cereal import requirement is estimated at 680 000 tonnes, of which the maize deficit accounts for about 70 percent.
- Cotton and tobacco production figures are similar to those of last year, with higher yields from smaller areas. Groundnut, soybeans, sugar beans and sunflower production all showed significant increases compared with last year.
- The annual rate of inflation has come down from the estimated 56 million percent (the World Bank calculation) in 2008, a global historical record high, in 2008 to zero (or even negative level) since the country abandoned its currency in March 2009 and adopted the US Dollar and South African Rand as legal currencies in March 2009.
- The Government has also announced grain market reform including free movement and buying and selling of grain in the country, removal of import duties (until June) and designation of the government parastatal, GMB, as a buyer of last resort to maintain a floor price. This has filled the shops with products (mostly from South Africa) and reduced prices. For example, the retail price of maize in major cities has come down from nearly USD 1.2/kg in October-November 2008 to about USD 0.20/kg in May. The full impact of the reform on the next season's production potential is yet to be seen especially in light of low financial liquidity and other problems of economic transition.
- Commercial imports are restricted by financial liquidity constraints and are difficult to forecast during the current marketing year. It is conceivable that total commercial imports, assuming no import restrictions, and sufficient financing would be around 500 000 tonnes of cereals including some 330 000 tonnes of maize to satisfy the domestic demand. This would still leave an uncovered deficit of about 180 000 tonnes of all cereals.
- Given the uncertainty of imports in the new economic environment the Mission recommends that the national cereal balance sheet be reviewed and updated periodically; The Food Security Technical Working Group may perform this task with contributions from relevant stakeholders. In any case, the Government should monitor the targets and the progress of private sector imports and be ready to carry out its own imports to ensure food security across the country.
- Transitory food insecurity among communal farmers is expected across the country during 2009-10 but especially in Mashonaland East, Masvingo and Manicaland.
- The Mission provisionally estimates that a total of 2.8 million people in rural and urban areas will be food insecure during the 2009/10 marketing year and will require food assistance amounting to some 228 000 tonnes (including 190 000 tonnes of cereals).
- These estimates need to be revised on the basis of the planned August 2009 ZimVAC assessment, which will define the nature and level of assistance required to mitigate a situation that is expected to worsen from October 2009 to March 2010.
- In addition to food assistance, the Mission also recommends emergency assistance by the Government and the international community in acquiring fertilizer and quality seed for delivery in September 2009, and dipping chemicals for the control of tick-borne livestock diseases.
- To deal with the problems of an economy in transition and with chronic food shortages, it is recommended that the international community and the Government enter into a dialogue to mobilize economic assistance. Sustainable food production in Zimbabwe would require re-establishment of its domestic seed industry, promotion of conservation agriculture, rehabilitation of irrigation facilities, investment in farm mechanization and improvement in the Agricultural Extension Service.

1. **OVERVIEW**

Zimbabwe faced uncontrollable and ever-escalating hyperinflation, a sustained period of negative economic growth, massive devaluation of the currency, reduced productive capacity with significant de-industrialization and resulting widespread poverty and food shortages during much of the last year. Against this backdrop a joint FAO/WFP Crop and Food Security Assessment Mission (CFSAM) was requested by the Government. The Mission visited the country from 24 April to 15 May 2009 to carry out an independent assessment of the 2009 production of the main cereals, assess the overall food security situation and determine the food import requirement, including food assistance needs, for the current marketing year 2009/10 (April/March). The primary purpose of a CFSAM is to provide an accurate picture of the extent and severity of crisis-induced food insecurity, existing or expected, in the country (and in specific areas) so that timely and appropriate actions can be taken by the government and the international community to minimize the impact of the crisis on affected populations.

In Harare, the Mission held meetings with the Ministry of Agriculture, Mechanization and Irrigation Development (MAMID), UNDP Resident Coordinator, FAO Representative and FAO technical staff, WFP's Country Director and other staff, World Bank, UNICEF, IOM, UNICEF, Department of Social Welfare (Ministry of Labour and Social Welfare), Grain Marketing Board (GMB), Zimbabwe Meteorological Department, Central Statistics Office (CSO), Ministry of Health and Child Welfare, Zimbabwe Food and Nutrition Council (ZFNC), Commercial Farmers Union (CFU), Zimbabwe Farmers Union (ZFU), Millers/Traders (namely, National Foods, Blue Ribbon Foods), the Zimbabwe Fertilizer Company (ZFC), Seed Co, the Zimbabwe Vulnerability Assessment Committee (ZimVAC) and some of the international and national NGOs. The Mission benefited from valuable inputs from these meetings.

In the field, the Mission was assisted and guided by senior specialists from the Department of Agricultural Technical and Extension Services (Agritex) and other staff of MAMID, the GMB, the Department of Meteorology and the Ministry of Labour and Social Welfare, along with four FAO and two WFP staff members from the country office. Four observers - USAID, FEWSNet, EU and DfID - participated in the main discussions and the first two in the field visits. The Mission divided itself into four teams, travelled to all eight rural provinces, and covered a total of 28 out of the country's 58 rural districts over a 9 day period. The districts to be visited were selected using a range of criteria including the overall productivity, agro-ecological zones, and livelihood/vulnerability considerations. These were similar to the districts visited by the 2008 CFSAM. In each province and district, the teams met with administrative authorities including the Governor of the Province and Agritex officials. After these meetings, the teams travelled to different wards of the selected district covering the various farming sectors (communal, A1, A2, Old Resettlement, Small Scale Commercial and Large Scale Commercial). Brief observations on urban and peri-urban plots of crops in Harare and Bulawayo, visits to rural/local markets and interviews with traders were conducted. The Mission also relied heavily on the remote sensing analysis and data on rainfall (in particular the satellite-based dekadal estimated rainfall for the current season, the last season and the long-term average for each district), vegetation indices (NDVIs) and various interim assessment reports.

The Mission had access to Agritex's own post-planting area assessment carried out in the first week of February (Round 1) and the pre-harvest crop assessment carried out during the second week of April (Round 2). This information was used as the basis for verification. Livestock conditions were observed and investigated en route and in the districts visited. Field assessments were made regarding households' food production, food security, vulnerability, coping mechanisms and social welfare programmes following the "triangulation" methodology described in the revised CFSAM Guidelines¹. The crop production and vulnerability situations this year were compared with previous years to get a relative historical perspective. Data and information received from secondary sources were reviewed against data, information and insights obtained during field visits in arriving at the estimates made by the Mission.

The Mission used national, provincial and district production data and combined this with information obtained from household farmer's interviews and community focus-group discussions. Potential income from cash crop and livestock production/sales was used to draw conclusions about the status of food security and the corresponding impacts of the production failure.

The results of this Mission are described in the following sections and are summarised in the Highlights above.

¹ FAO/WFP Joint Guidelines for Crop and Food Security Assessment Missions (CFSAMs), January 2009.
<http://www.fao.org/docrep/011/i0515e/i0515e00.htm>

2. SOCIO-ECONOMIC SETTING²

2.1 Population

The National Census of 2002 estimated Zimbabwe's population as 11.635 million (as of 18 August 2002). The projection for 2007 in the CSO's document³ put population at 11.83 million with implicit year-on-year growth rate of 0.3 percent for 2006 and 2007. The growth rate presumably reflected the excess mortality due to HIV and AIDS under fertility/mortality Assumptions 1 and 2 used by CSO for projections. Using this same growth rate the projected population for 2009 would be 11.9 million. However, CSO has recently revised the total population estimate for 2009 upwards to 12.2 million. It is presumed that the upward adjustment is based on Assumption 3 reflecting a lower death rate under the HIV and AIDS scenario and consequently using a higher growth rate (1.1 percent) since 2002. It is true that published sources indicate a reduction in new HIV and AIDS infections and prevalence rates (see further details in Section 6). However, the 2006 Demographic and Health Survey found that the death rates in 2005/06 were the highest compared to any period in the past. Therefore, it is unlikely that the reduced HIV and AIDS prevalence would result in a significantly lower death rate so quickly.

The second factor related to population is out-migration. There has reportedly been a significant amount of out-migration from Zimbabwe, particularly into South Africa and overseas, for the last six years. However, there are no reliable statistics on this available. The CSO now accepts a low figure of 350 000 as out-migrants since 2002. On the other hand the Reserve Bank of Zimbabwe (RBZ) has been using 3 million as a planning figure for the purpose of remittance calculations. One study which was undertaken by the International Organization for Migration (IOM) indicated that at Beitbridge, the main border crossing with South Africa, some 200 000 persons were deported back from South Africa and were registered and assisted by IOM over a two-year period. It is common knowledge that those who are deported are a small fraction of those who actually cross the border. It is, therefore, conceivable that since 2002, the total out-flow to South Africa and other countries has been significant. Given that some of the major international organizations in the country, such as the World Bank for example, use the population estimate of 11 million as a planning figure, with the assumption of out-migration of about 900 000, the Mission decided to use this for the purposes of this report. Using the CSO proportions at the national level, some 7.6 million or 69 percent of the population are classed as rural and the remaining 3.4 million as urban.

It should be noted that CSO has carried out two inter-census surveys in 2007 and 2008 but the results of which, according to CSO, are "not reliable" and hence not usable.

2.2 Macro-economic situation and policies

Having faced unprecedented hyperinflation, severely decreased domestic currency value, severe and prolonged economic decline as well as the loss of currency-printing contractual agreement with a German firm, the Government of Zimbabwe abandoned the Zimbabwe dollar in March 2009 and announced the undertaking of total economic reform liberalizing most sectors of the economy. Fully convertible foreign currencies such as the US dollar, South African Rand and Botswana pula are legal currencies in the country. Prior to this action, the last highest denomination in circulation was the 100 Trillion Dollar note, after 12 zeros had been removed in two re-denomination actions in the previous two years (July 2006 and July 2008). The loss of currency value and need to regularly print higher denomination notes was a result of the hyperinflation, which in itself was primarily caused by excessive printing of new money combined with plummeting national production in almost all sectors of the economy. The new policies of using stable foreign currencies, a pay-as-you-go budget and ceasing quasi-fiscal activities have solved the problem of inflation, for now. In fact, as the use of foreign currencies set in the first 2 months of 2009 witnessed price deflation, with the CPI decreasing by 5.4 percent.

Since the change to foreign currencies (dollarisation), the Government has been forced to ration the limited currency at its disposal by fixing all civil service salaries at USD 100/month; however, these are called "allowances" and are seen as a temporary measure. Private sector businesses pay even less. Through most of 2008 and into 2009, barter trade had become even more common in the exchange of goods/services. With limited amounts of foreign currency in circulation the exchange of goods and services has been difficult, but with inflation having vanished as a bad nightmare, most people prefer the new system. However, if the shortage of foreign currency continues and the limited currency moves out of the country to pay for imported

² The Section is based on a variety of sources including publications and unpublished reports from the Reserve Bank of Zimbabwe, the World Bank office in Harare, Country Reports of Zimbabwe by the Economist Intelligence Unit and other information from FAO and UNDP.

³ Census 2002, Zimbabwe – In-depth Analysis, Central Census Office, Central Statistical Office.

goods, inflation, and economic problems could return. Similar economic transitions in other countries have been rapid and successful only with a massive amount of foreign aid and/or funds injections.

The new economic paradigm, with various measures to overcome problems of transition was outlined in the Government's Short Term Emergency Recovery Programme (STERP), which was unveiled in March 2009. In this document, the Government also appealed for international donor assistance of more than USD 5 billion including some USD 1 billion for agriculture sector support mostly in the form of seed, fertilizer, fuel and other agro-chemicals. As of 8 May 2009, the country had secured only about USD 650 million in lines of credit, mostly from the SADC countries.

Annual economic decline had continued year-on-year for a decade as 2008 became the tenth year of continued negative growth in the country's real gross domestic product (see Table 1). Since 2001 the key economic indicators paint a picture of extremely high unemployment (about 80 percent by some estimates) and under-employment rates, with the urban situation becoming especially serious in recent years. The economy had shrunk by about 50 percent in real terms between 1998 and 2008. Even before the poor harvest of 2002, 75 percent of the country's population was classified as poor and about 42 percent as very poor (CFSAM 2002). The poverty situation became worse in view of the consecutive depressed harvests and a phenomenal rise in the nominal as well as real cost of living. The poor include the rural population of communal farmers, most of the informal sector workers, former farm workers and the urban unemployed. Successively reduced harvests and shrinking economic output had severely constrained the people's coping capacity.

Table 1: Zimbabwe - Key economic indicators, 2001–2009

	2001	2002	2003	2004	2005	2006	2007	2008 est.	2009 exp.
GDP per head (USD at PPP) ^{1/}	214	204	185	182	174	170	165	145	lower
Real GDP change (% year on year)	-8.4	-5.6	-10.6	-4.2	-7.7	-4.6	-5.5	-12.6	from negative to slightly positive ^{2/}
Agricultural GDP growth rate (%)	-3.9	-22.7	-1.0	-2.9	-10.0	-4.5	-5.0	-17.5	positive ^{2/}
Consumer price inflation; avg (%)	75	135	385	381	267	1 034	12 563	56 mill.	near zero
Agricultural exports % of total	39	36	31	23	21	14	22	23	higher ^{3/}
Total exports (USD mill.)	2 114	1 802	1 670	1 684	1 606	1 533	1 804	1 651	lower ^{3/}
Total imports (USD mill.)	1 791	1 821	1 778	1 989	1 994	2 000	2 113	2 630	lower ^{4/}
Trade deficit (USD mill.)	-323	18	108	305	388	467	310	979	lower
Total external debt (USD bill.)	3.6	3.9	4.5	4.8	4.3	4.7	5.3	6.0	higher

Sources: The Reserve Bank of Zimbabwe; EIU; World Bank, Harare; and CFSAM expectation for 2009.

1/ Given the significant out-migration of population not accounted for in the official population figures the GDP per capita is somewhat under-estimated and its decline overstated.

2/ Due to estimated increase in crop production.

3/ Mainly due to decrease in total exports and reduced mineral prices.

4/ Due to lack of availability of foreign currency to pay for imports and reduced maize import requirements.

Zimbabwe's exports include minerals (platinum, gold, nickel, diamonds, etc.), agricultural products (tobacco, sugar, horticultural products) and manufactured products (some processed mineral-based products and others). In 2008, total mineral exports, the main source of Zimbabwe's export earnings, declined by 12 percent over 2007 levels and, following reduced international demand, mineral prices are expected to drop further by 24 percent in 2009. The world platinum price is expected to drop from a high USD 1 563 per ounce in 2008 to about USD 900 per ounce in 2009 – the cost of production in Zimbabwe is considered to be USD 1000 per ounce.

Production of tobacco and cotton was slightly better in 2007 after reaching an all-time low in 2006 but further declined in 2008 and is estimated to diminish still further in 2009. The sugar sector also has performed poorly. Thus, the prospects for 2009 exports are not very good.

The declining trend in total exports and the rising value of imports (fuel, electricity, food, chemicals, etc.) have led to an increased trade deficit reaching an estimated record high of USD 979 million in 2008. Hence imports of consumer goods had reduced almost nothing, until the economic liberalization in March 2009. The economy continues to suffer from shortages of fuel, electricity, fertilizer and spare parts for machinery and irrigation equipment, all of which are imported.

2.3 Agriculture in the national economy and policies

Agriculture has been the mainstay of the national economy accounting for about 15 to 20 percent of GDP but with a majority of the country's population is engaged in this sector. It generates a large proportion of foreign exchange earnings, although the share of agricultural exports in the country's total exports has declined from 39 percent in 2001 to 14 percent in 2006 with some relative improvement in 2008 and 2009 (see Table 1).

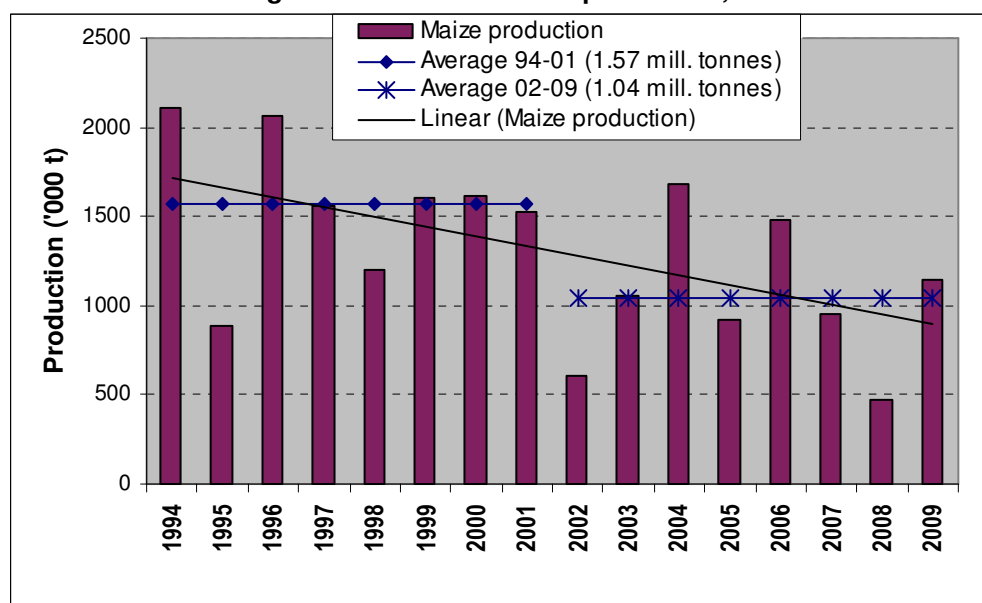
The current agricultural policy reform: Since March 2009 grain marketing has been completely liberalized. Since late 1990s the grain marketing was tightly controlled by the Government through its parastatal, the Grain Marketing Board (GMB). Maize and wheat and to some extent other commodities were officially traded through GMB. No movement of these grains was allowed with the exception of small quantities (for example 150 kg) beyond what was called the "farmer-to-farmer" sales. Although some grain did pass through informal channels especially when there were major shortages of maize and price discrepancies between formal and informal channels were considerable. The grain marketing policies of price control in practice have encouraged subsistence farming, i.e. producing only to meet the farmer's own basic needs and have discouraged production for sale. Thus, the agricultural marketing policies of the recent past, including the lack of alternative marketing channels, price controls with irrelevant procurement prices in an environment of hyperinflation, and non-payment from the Government, have adversely affected production of maize, wheat and other controlled crops. More details are provided in section 4 on markets.

In the new environment, the role of GMB has been changed from one of monopoly trader purchasing, importing and selling maize and several other grains, to that of buyer of last resort to help maintain floor prices for maize to protect domestic producers. The Mission sees the market reform as a very positive development. By and large, most stakeholders interviewed by the Mission also welcome this new development. However, the newly announced local purchase price of USD 265/tonne for maize is largely ineffective at the moment due to GMB's inability to function with virtually no liquidity. It is also not clear how GMB is to perform the assigned dual role of being a private enterprise for grain trading/milling and to implement the floor-price policy of the Government. However, with its vast infrastructure, network and technical staff it should be possible for GMB to compete in the open market while selling its services to the Government to help implement certain public policies.

Production capacity trends: Zimbabwe's land is divided into five natural regions on the basis of soil type and climatic factors (see Map 1 Section 6.3). Natural regions I, II and III are suitable for intensive crop cultivation and livestock raising, while regions IV and V offer limited scope for crop agriculture but are suitable for livestock raising on a large scale. The bulk of Mashonaland (West, East and Central), Midlands and Manicaland Provinces are under regions I, II and III, while Matabelelands (North and South) and Masvingo Provinces are under natural regions IV and V. The three Mashonaland Provinces constitute the breadbasket of the country. Zimbabwe's farming sector can produce, and has produced in the past, exportable surpluses of maize and certain other food crops. But, as described earlier, severe constraints on prime land use have resulted in less than full capacity utilization of its natural resources.

A strong negative trend in production of national maize, which accounts for the major part of food production, over the last 15 years is evident (see Figure 1). In addition, the figure shows a drop in the average annual production of about 530 000 tonnes between the two periods, before and since 2002. The reasons for the downward trend, before the fast track land reform, include a gradual switch by the large-scale commercial farms from maize, which became a GMB-controlled crop, to other non-controlled crops such as tobacco, cotton, among others. A more recent decline (since 2002) is due to the structural change precipitated by land tenure policies, the lack of investments/funds domestically and externally in agriculture sector, and overriding economic deterioration. As shown in Table 2, the newly settled farmers cultivate only about 50 percent of the total arable land allocated to them owing to shortages of tractor/draught power, fuel, and investment in infrastructure/improvements and absenteeism on the part of some new settler beneficiaries. The large-scale commercial sector now produces less than one-tenth of the maize that it produced in the 1990s. Some experts also argue that environmental factors such as increased frequency of drought, combined with maize production being on more marginal lands of the communal farms with little or no fertilizer, can explain some of the long-term negative trends.

Figure 1: Zimbabwe maize production, 1994-2009



Source: CSO; CFSAM for 2009.

Table 2: Zimbabwe - Agricultural land utilization pattern, 2006/07 and 2008/09

	No. of farmers (000)		Arable land holding (ha)		Total arable land (000 ha)		Cultivated land (000 ha)		% land utilisation	
	06/07	08/09	06/07	08/09	06/07	08/09	06/07	08/09	06/07	08/09
CA	1 132	1 200	2.2	2.1	2 491	2 500	1 924	2 332	77	93
OR	160	160	5	5	800	800	241	217	30	27
A1	145	145	5	5	725	725	357	385	49	53
A2	15.5	16.5	Variable	Variable	710	710	161	162	55	49
SSC	30	8.5					116	107		
LSC	0.9	0.8					113	77		
Total	1 484	1 531	--	--	4 726	4 735	2 911	3 279	62	69

Source: Agritex.

2.4 The land reform programme

Land distribution in Zimbabwe remains highly skewed. A land-reform programme was initiated following independence to increase access of the indigenous people to land. The first phase covered the period 1980 to 1998, during which 3.5 million hectares of land were acquired by the Government and 71 000 indigenous families were resettled. The second phase was initiated in 1998, but only a small area of 0.17 million hectares was acquired and 4 697 families were resettled. According to Commercial Farmers Union data for 1995, the average size of large-scale commercial farms (4 700 in total) was 3 000 ha as opposed to less than 30 ha for the communal and resettled area farms (862 000 in total). In fact communal farmers then had an average land holding of about a hectare, which now has increased to about 2 hectares (see Table 2). Large-scale commercial farms being highly capital intensive and dependent on relatively low wage labour force (on average 40 workers per farm) contributed 80 percent of the national agricultural output. In July 2000, the "Fast Track" resettlement phase was launched to speed up land acquisition and resettlement. A law was enacted for the purpose, with compulsory acquisition and resettlement being the key focus. With the ongoing land reform programme, only about 200 or so active large-scale commercial farms remain now, most of them operating only on part of their original land holding and unable to acquire credit to make any new investments and improvements. Since 2001 the former large-scale farms have been converted into A1 model farms (small subsistence farmers) and A2 model farms (commercial medium and large farmers). Many of these A1 and A2 farmers lack access to capital and other inputs, contributing to severe under-

utilization of land resource (see Table 2) and low production. Also, there has been a significant decline in the national dairy and export beef herds as a consequence of this change.

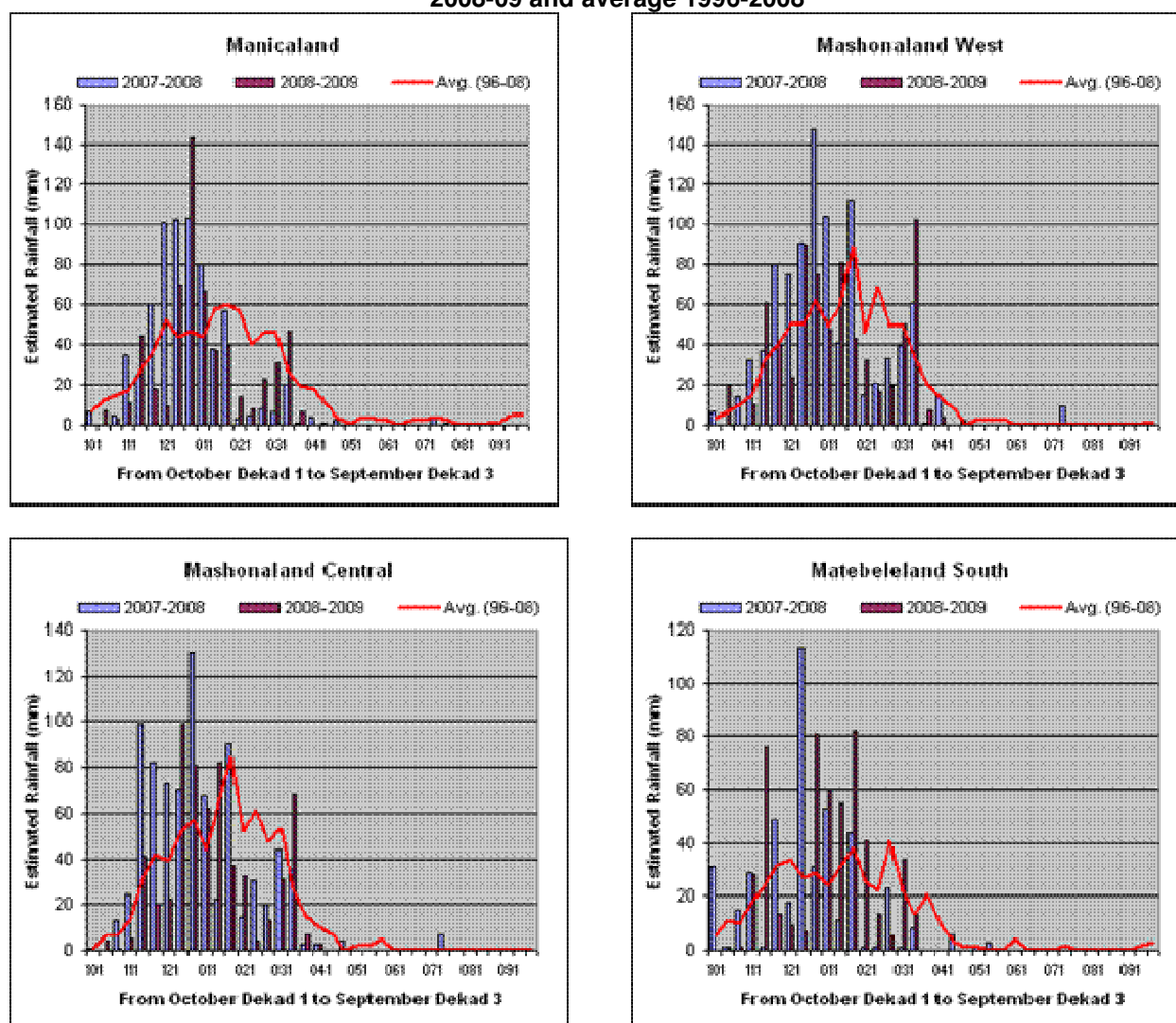
3. FOOD PRODUCTION IN 2009

3.1 Rainfall

Rainfall in 2008/09 was significantly more favourable in terms of distribution than that of 2007/08 which was characterised by flooding and water-logging in December and early January, and unusually dry conditions thereafter. In contrast, the 2008/09 season began well with effective rainfall starting mostly in the latter half of November. This was followed by a slightly drier-than-normal start to December in many areas, but, except in some small areas of the east and south, amounts were generally sufficient to ensure good crop establishment. Some replanting and gap-filling was required in those parts of the east and south where the dry spell was more acute. Rainfall amounts and distribution were generally good across the country in the second half of December and well into January. Drier conditions (the result of a cyclone in the Mozambique Channel) returned at the end of January and into February, especially in the north-east and the south, but by this time early-planted crops were well established and were not seriously affected. Unusually high rainfall was received in March, and in some areas the rains continued sporadically into early May, the result of a band of low pressure over the south of the country. While the March rains probably helped some of the late-planted crop, those crops still standing in the field in May in areas that received very late rainfall may have been adversely affected by the uncharacteristically damp conditions. According to the Meteorology Department the WRSI (water-requirement satisfaction index) for the cropping season was good to very good in the west, mediocre to average in the east, and poor in some parts of Masvingo.

Figure 2 shows the estimated average rainfall per dekad for four provinces; these suggest, especially in the north and east of the country, a general shift during the last two years towards heavier rainfall in December and lower rainfall in February compared with the 10-year average for 1996-2006.

Figure 2: Zimbabwe - Estimated average rainfall per dekad for selected provinces, 2007-08, 2008-09 and average 1996-2008



Source: GIEWS of FAO

3.2 Inputs

High costs and limited availability of inputs were among the main constraints to crop production in 2008/09. At the beginning of the season, fertilizer was selling at about one USD per kilo. About 19 000 tonnes of compound D and 12 000 tonnes of top-dressing were distributed, mainly to communal areas, through the government's Champion Farmer Programme. In addition, FAO provided 300 000 households with seed and fertilizer; the fertilizer component included 5 300 tonnes of compound D and 10 200 tonnes of top-dressing, which were distributed by various NGOs. The Champion Farmer Programme also provided seed, though farmers in many areas complained that it germinated poorly. Seed and fertilizer worth USD 31 million were donated by SADC but in most areas they were delivered too late for effective use, sometimes as late as the end of January with many farmers keeping it until the next summer season, although some of those who used it benefited from the late rains in March. In addition, the SADC seed, coming from South Africa, was not always the most suitable for the agro-ecological zones where it was distributed. Given the general shortage of seed this year, a larger number of farmers than usual, especially in communal areas, planted retained seed, and many planted seed that was received as food aid; in many cases the food-aid seed performed as well as or better than the retained and the SADC seed. The fact that farmers had so much retained seed to sow this year was surprising in view of the supposedly very poor harvest last year.

This year's shortage of seed and fertilizer at the farmer level was not an entirely accurate reflection of the amounts in the country. Seed Co, which has about 80 percent of the market share for hybrid maize, has about 7 500 tonnes of maize seed in store in Harare, of which 1 500 tonnes are carry-over stocks from last year. It also has 7 000 tonnes of wheat seed. Normally by mid-May, Seed Co would normally have sold

between 4 000 and 6 000 tonnes of wheat seed, but this year it had sold a mere 500 tonnes. This is in part due to the relatively high price of the home-produced seed - a result, partly of the economic chaos at the time of production - but also because of farmers' lack of liquidity which resulted from payment difficulties for their winter crop last year because of the drastically declining value of the Zimbabwean dollar. The fertilizer industry in the country has experienced similar difficulties. ZFC, one of the country's main producers (along with Windmill, another producer, and Omnia, an importer and blender) has the capacity to produce 16 000 tonnes of fertilizer per month. During 2008, however, it sold only 35 000 tonnes (just over a sixth of its capacity), and because of a shortage of foreign currency to import expensive raw materials, production only begins when a firm order is received. Meanwhile, 3 500 tonnes of compound D and 3 000 tonnes of ammonium nitrate remain in the company's warehouses with no buyer.

The Department of Agricultural Mechanisation estimates that only about 2 percent of Zimbabwe's arable land is prepared using tractors, down from an estimated 5 percent in 2004/05. There are several reasons for this decline. In 2000 there were some 20 000 operational privately-owned tractors in the country and a further 2 000 with DDF. The Department of Agricultural Mechanisation now estimates that the total number of tractors in the country has fallen to about 14 000, of which 4 000 that were imported by the RBZ during the second half of 2007 and 2008. Of the remaining 10 000 perhaps only one-third are agriculturally operational, and DDF's pool, which is intended for public hire, is severely reduced. The imported tractors, mostly about 80 hp, came chiefly from Brazil and China, included a number of different makes, and were destined mainly for A2 farms. The first tranche of 925 new tractors was accompanied by 586 ploughs, 463 harrows, 226 sprayers and a small number of combine harvesters, fertilizer spreaders and planters. Unfortunately the implements were not always well matched to the power of the tractors intended to draw or carry them. The Department of Agricultural Mechanisation provided training in operation and maintenance for the first tranche of RBZ tractors that was limited to only two days and it is not known if any other trainings took place for the rest of imported tractors.

In previous years, diesel for tractors was heavily subsidised in an attempt to stimulate tractor-powered land preparation. However, the diesel was often sold on by farmers, at subsidized prices, for non-agricultural uses such as general transport and the operation of private vehicles. Partly for this reason, fuel subsidies were phased out at the end of 2008 and the beginning of 2009, with the result that farmers who genuinely depended on subsidised fuel for their agricultural operations were financially compromised. A further disincentive to tractor cultivation is the USD 70 (exclusive of fuel) charged by DDF for the preparation of one hectare.

Tractors are extensively used for non-agricultural work such as general transport, which can often be more lucrative than agricultural work; the Mission came across a 6-month old New Holland tractor that had prepared only 25 ha of land (on an A2 farm of about 500 ha) but nevertheless showed 540 hours of use on its clock.

Some farmers complained of a reduction in the availability of animal draught power as a result of selling off livestock for slaughter at the end of 2008 in order to raise money following last year's poor harvest.

As in previous years, herbicides were not readily available and expensive and thus its use was consequently very low throughout the country and largely confined to the larger farms, although under-utilisation was often very evident there too. Since dollarisation, casual farm labour for weeding is perceived, since dollarisation, as being expensive at between US 1 and USD 2 per day. On a large proportion of farms, therefore, weeds significantly compromised maize yields.

The unreliability of ZESA's electricity supply remains a strong disincentive to wheat growers who depend on irrigation during the dry winter months for the success of their crop. This, as well as the high cost of inputs and therefore small marginal return, were key contributors to the decline of Zimbabwean wheat production from approximately a quarter of a million tonnes per annum at the end of the 1990s to a forecast of 12 000 tonnes in 2009.

3.3 Pests and diseases

Crop pests and diseases this year were of comparatively minor importance. In the drier areas of the south some losses of sorghum and pearl millet to *quelea* birds were reported. Maize stalkborer (*Busseola fusca*) was widespread, but infestation levels were well within the normal range. There were some minor outbreaks of armyworm in Manicaland, Midlands, and the three Mashonaland, but none was serious and all were contained. In Mashonaland East, nematodes were said to be a problem for the tobacco crop, especially on small farms where, because of a shortage of available land, farmers did not implement a four-year rotation.

Some grasshopper damage to groundnuts was reported in Matabeleland North. In Mashonaland West it was reported that, in the absence of compound L (which has a high potassium content), compound D was applied to cotton, with the result that the crop became more susceptible to *Fusarium* and *Alternaria* infections.

3.4 Area planted

Despite an increase in the area under sorghum and millets, the country's total area under summer crops was smaller than that of last year as a result of a reduction in the area under maize. This was largely attributable to the shortage of essential inputs for maize. However, farmers may also have been discouraged by last year's poor harvest from planting maize more extensively and may have preferred the assurance of some production from the more drought-tolerant cereals. It should be noted, however, that last year's maize area was in fact above the average for the previous ten years, while that of 2008/09 was close to the average (see Table 3). Had rainfall this year been similar to that of 2007/08 production might have been disastrously low. However, despite the reduced area under maize, and the relative shortage of inputs, this year's below average but generally well-distributed rainfall throughout the season ensured a rather better harvest for all four cereals.

Table 3: Zimbabwe - Maize area, yield and production, 1999-2009

	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Area (000 ha)	1 478	1 374	1 240	1 328	1 352	1 494	1 730	1 712	1 446	1 722	1 426
Yield (t/ha)	1.09	1.18	1.23	0.46	0.78	1.13	0.53	0.87	0.66	0.27	0.80
Production (000 t)	1 607	1 620	1 526	605	1 059	1 686	915	1 485	953	471	1 140

Source: 1999-2007 CSO, 2008 Agritex, 2009 CFSAM.

The area under wheat is expected to be the lowest since the mid-1960s, at about 4 000 ha. There may, however, be a slight increase in the area under barley with the wheat growers turning increasingly to the financial security of producing for Delta Beverages under contract.

The areas under the major cash crops, tobacco and cotton, was lower again this year compared with last year by more than 20 percent to about 48 000 and 338 000 ha respectively (see Table 7); which was mainly in response to unsatisfactory payment regimes last year. Soya, groundnuts and sugar beans, however, saw a significant increase in area, while the area under sunflower almost doubled to 79 000 ha, seemingly in response to the wish of households to be self-sufficient in cooking oil.

3.5 Yields

All summer cereal yields were better this year than last, despite the general difficulties with inputs. While the better performance can be attributed to the favourable rainfall this year, it is important to note that yields are still very low and that only when they are compared with those of last year do they appear satisfactory. The average maize yield this year, at 0.8 t/ha, still compares unfavourably with the 1990s 10-year average of more than 1.25 t/ha (FAOSTAT).

Tobacco and cotton yields (1.3 and 0.73 t/ha respectively) were both up this year compared with last year, more than compensating for the reduction in planted area for cotton, and almost compensating for tobacco. Groundnut yields (0.61 t/ha) were also higher than last year and this, combined with an increase in crop area, resulted in a 65 percent increase in production. Sugar bean and sunflower yields (0.71 and 0.49 t/ha respectively) also rose, but from an extremely low base of about 0.1 t/ha in 2007/08.

3.6 Estimated main-season production

This year, Agritex conducted First and Second Round Crop Assessments prior to the arrival of the CFSAM, extension agents collected sample crop-area data from all 1 386 wards, sometimes using measurement but more often relying on farmers' statements or their own visual estimates. These data were then extrapolated using the estimated number of farming households in the ward. There are three obvious potential weaknesses in this process:

- i. the sample of farms may be unrepresentative of the ward as a whole,
- ii. the area estimate of individual farms may be inaccurate, and
- iii. the number of farming households in the ward may be incorrect.

Given its time constraints, a CFSAM is unable to address (i) and (iii), but it does have the opportunity of assessing the level of accuracy of the area estimate of individual farms. This year, the Mission carried out crop area measurements in sample farmers' fields using GPS units equipped with an area-calculation facility in order to compare the measured area with the area estimated by the farmer or by the extension agent. If a consistent trend of either over-estimation or under-estimation was revealed, a correction factor would then be applied, in consultation with Agritex, to the relevant district. If similar trends were found in other districts in the province, a modified correction factor would then be applied to the province as a whole. Measurements of yield by quadrat and row sampling were also carried out as usual and adjustments made to Agritex's figures where necessary.

The Mission generally found good agreement between Agritex's area and yield estimates and its own measurements. However, some provinces showed slight over-estimation of area while others showed slight over-estimation of yield. Suitable correction factors were then applied to Agritex's figures which produced a slightly lower national production estimate compared with that given in Agritex's Second Round Crop and Livestock Assessment Report. The Mission calculations show revised maize planted area as 1.43 million ha, or some 6 percent lower than the 1.52 million ha used by Agritex. The individual provincial corrections ranged from zero to 10 percent based on the mission's field area measurements. Similar correction was applied to area planted to millets and sorghum. Similarly the Mission calculations show revised yields on average (at national level) some 2 percent lower than the Agritex's second round estimates.

National maize production is estimated to be 1.14 million tonnes, with an average yield of 0.79 t/ha from 1.43 million hectares. This represents an increase of 130 percent over last year's production (see Table 4) and a slight improvement on the average of the previous five years (2004-08, 1.10 million tonnes). Midlands, Masvingo, Matabeleland North and Matabeleland South all showed very large relative production increases for maize this year; these were mostly attributable to increased yield from the very low levels of less than 0.15 t/ha last year to more than 0.5 t/ha this year.

Table 4: Zimbabwe - Maize area, yield and production for agricultural season 2008/09, by province, and comparison with 2007/08 ^{1/}

	Area (000 ha)			Yield (t/ha)			Production (000 t)		
	07/08	08/09	%Chg	07/08	08/09	%Chg	07/08	08/09	%Chg
Mashonaland Central	226	171	-24	0.50	0.97	94	113	166	47
Mashonaland West	191	186	-2	0.45	1.26	180	85	234	176
Mashonaland East	322	230	-29	0.27	0.73	171	88	168	91
Manicaland	315	195	-38	0.35	0.74	112	109	145	33
Midlands	294	272	-8	0.10	0.67	571	29	182	532
Masvingo	230	187	-19	0.14	0.64	360	32	120	271
Matabeleland North	76	81	6	0.11	0.51	365	9	41	385
Matabeleland South	68	97	43	0.10	0.58	484	7	57	763
Total of provinces	1 722	1 418	-18	0.27	0.79	187	471	1 114	136
Peri-urban/urban ^{2/}	7.5	7.5	0	3.50	3.50	0	25	25	0
ZIMBABWE ^{3/}	1 730	1 426	-18	0.29	0.80	181	496	1 140	130

^{1/} 2007/08 figures from Agritex Second Round Crop and Livestock Assessment Report 2009.

^{2/} Estimate same as last year. According to FEWSNet (Dec. 2007) urban agriculture contributes significantly to cereal needs for urban households, particularly in towns and cities located in areas of high agricultural potential. Here a conservative estimate by CFSAM based on discussions with experts and assumptions that on average one-third of the peri-urban/urban households possesses a 10x10 meter garden yielding about 3 tonnes per ha is made.

^{3/} For lack of confirmation of resource/liquidity availability this year it is considered that the winter maize production may be very small. Therefore it is left out of the total here. It would be thus counted as part of the other food availability.

Sorghum and millet production has doubled this year compared with last as a result of increased area and yield (see Table 6). However, their national average yields still remain well below 0.5 t/ha.

3.7 Winter crops

Until quite recently, wheat used to be an important winter crop in Zimbabwe, with annual production often exceeding a quarter of a million tonnes (see Table 5). This year, because of the high cost of inputs, farmers' lack of financial liquidity and the uncertainty of the electricity supply to power irrigation pumps, it is anticipated that total national production may be no more than 12 000 tonnes. The Commercial Farmers Union expects large-scale commercial farms to grow about 1 000 ha with an average yield of 4 t/ha, and the resettled farm sector to grow about 3 000 ha with an average yield of 2.5 t/ha.

Table 5: Zimbabwe - Wheat production trends from 1996–2008, and forecast for 2009

	Area (ha)	Yield (t/ha)	Production (t)
1996	47 843	5.5	263 134
1997	45 495	5.6	254 772
1998	44 022	5.5	242 121
1999	47 438	5.5	260 909
2000	42 551	5.4	229 775
2001	37 269	5.3	197 526
2002	39 000	5.0	195 000
2003	40 809	3.0	122 427
2004	70 585	3.5	247 048
2005 ^{1/}	65 454	3.6	229 089
2006 ^{1/}	67 201	3.6	241 924
2007 ^{1/}	49 707	3.6	149 110
2008	10 300	3.0	31 000
2009 forecast	4 000	2.9	12 000

Source: 1996-2007 CSO; 2008 Agritex

^{1/} Of which deliveries to GMB were slightly over 50 percent.

3.8 Synopsis of food cereal production

Table 6 gives a synopsis of Zimbabwe's food cereal production for 2009 compared with last year. (Barley has not been included as it is used primarily for the brewing industry.) Maize, sorghum, millets and wheat are expected to provide a total of 1.38 million tonnes of grain, more than double last year's figure. Production will therefore satisfy almost two-thirds of the nation's requirement of about 2.1 million tonnes.

Table 6: Zimbabwe - Total cereal area, yield and production, by crop, 2008/09 and comparison with 2007/08

	Area (000 ha)		Yield (t/ha)		Production (000 t)	
	2007/08	2008/09	2007/08	2008/09	2007/08	2008/09
Maize	1 730	1 426	0.28	0.80	496	1 140
Sorghum	291	362	0.26	0.43	75	156
Millets	193	238	0.20	0.31	37	74
Wheat	10.3	4.0	3.00	2.88	31	12
All cereals	2 224	2 029	0.29	0.68	639	1 382

3.9 Cash and other crops

Cotton and tobacco areas were smaller this year than last. However, improved yields ensured a slight increase in cotton production and only a slight drop in tobacco production. Annual cotton production has remained in the region of 200 to 350 thousand tonnes for most of the last ten years, but tobacco production fell dramatically after 2001 and has shown no sign of recovery since then (see Table 7).

Table 7: Zimbabwe - Cotton and tobacco production trends, 2000-2009

Year	Cotton			Tobacco		
	Area (000 ha)	Yield (t/ha)	Prodn (000 t)	Area (000 ha)	Yield (t/ha)	Prodn (000t)
1999/2000	415	0.85	353	85	2.77	236
2000/01	397	0.84	337	76	2.65	202
2001/02	229	0.85	195	71	2.33	166
2002/03	282	0.85	240	54	1.51	82
2003/04	389	0.85	331	41	1.58	65
2004/05	350	0.56	198	56	1.33	75
2005/06	300	0.86	258	27	2.03	55
2006/07	354	0.84	300	53	2.16	79
2007/08	431	0.52	226	62	1.10	70
2008/09	338	0.73	247	48	1.33	64

Source: 1999/2000 – 2006/07 CSO; 2007/08 - 2008/09 Agritex

The area under soya increased this year and average yields are expected to have doubled to 1.36 t/ha, giving the best production since 2001 (FAOSTAT). Groundnut, sugar-beans and sunflower showed similar increases in area, yield and production (Table 8).

Table 8: Zimbabwe - Soya, groundnut, sugar-bean and sunflower production, 2007/08 and 2008/09

Crop	2007/08			2008/09		
	Area (ha)	Yield (t/ha)	Prodn (t)	Area (ha)	Yield (t/ha)	Prodn (t)
Soya	72 311	0.67	48 320	85 227	1.36	115 817
Groundnut	29 9252	0.44	131 536	354 636	0.61	216 619
Sugar bean	39 875	0.10	3 803	52 265	0.71	37 329
Sunflower	41 445	0.13	5 461	79 212	0.49	39 018

Source: Agritex 2009

3.10 Livestock

Livestock numbers are difficult to assess in Zimbabwe since dipping tanks are normally used as census points but dipping is carried out very irregularly. The figures in Table 9 are therefore minima and may, in fact, be serious under-estimates. In general, there was a shift towards greater smallholder cattle ownership and a reduction in the number of large commercial herds with the introduction of the Land Reform Fast Track programme in the early 2000s. On the other hand, the apparent reduction in cattle numbers after 2001 (see Table 9) may a reflection of census difficulties which have been exacerbated by an increase in the number of small herds spread over a large area and the high rate of absenteeism amongst farmers on A2 and A1 farms.

In late 2008 many smallholders sold off their livestock, including cattle, in order to raise money for food, transport, school fees and other expenses following the poor main harvest. Undoubtedly some of these cattle were sold to larger farmers wishing to increase their herd size, but according to the Veterinary Department many were sold for slaughter, usually in an unfinished condition. As indicated in section 3.2 above, this reduction in the availability of animal draught power had an impact on the area under crops.

The 2008/09 season was worse than usual for veterinary problems. Tick-borne diseases such as red water (babesiosis), heart water and anaplasmosis were all common, and often resulted in mortality. Blackleg accounted for several losses. Anthrax was reported in almost every province, but in each case it was contained through the intervention of FAO's vaccination programme. The virus-caused lumpy skin disease, which was prevalent this year, usually results in reduced productivity rather than mortality; however, this year many deaths of cattle were recorded as a result of the disease.

Unsatisfactory dipping facilities and a seriously under-staffed and under-funded veterinary service have contributed to the poor health of the national herd. Cattle may go for more than six months without dipping, whereas the recommended frequency during the winter is once a month and once every two or three weeks during the summer. Some farmers complained that their dipping solution in their local dip was too dilute and that ticks could be seen on the animals as soon as two days after dipping. The Veterinary Department, however, suspects that the tick population may be developing immunity to the acaricide used. There have been some slight improvements in the dipping situation in individual districts in Midlands, Manicaland and Matabeleland South as a result of NGO interventions.

At the time of the Mission, healthy cattle (by far the majority) were in good condition, and pastures were generally fair to good. Drinking-water supplies, however, were less adequate than last year; the better distribution of rainfall resulted in greater soil infiltration and less run-off into dams and streams.

Table 9: Zimbabwe - Livestock numbers, 2000 - 2008 (millions)

Species	2000	2001	2002	2003	2004	2005	2006	2007	2008 ^{1/}
Cattle	6.19	6.42	5.24	5.30	5.23	4.99	5.05	5.01	5.11
Goats	3.80	3.78	3.38	3.28	3.11	3.27	3.12	3.32	3.17
Donkeys	0.42	0.47	0.50	0.44	0.45	0.40	0.52	0.40	0.53
Sheep	0.69	0.63	0.64	0.52	0.48	0.42	0.41	0.39	0.40
Pigs	0.34	0.31	0.18	0.42	0.17	0.17	0.19	0.18	0.20

Source: MAMID Veterinary Department.

1/ Accuracy of this year's statistics questionable as the numbers were first indicated as very low and these as very high.

4. FOOD PRICES AND MARKET ANALYSIS

4.1 Cereal markets

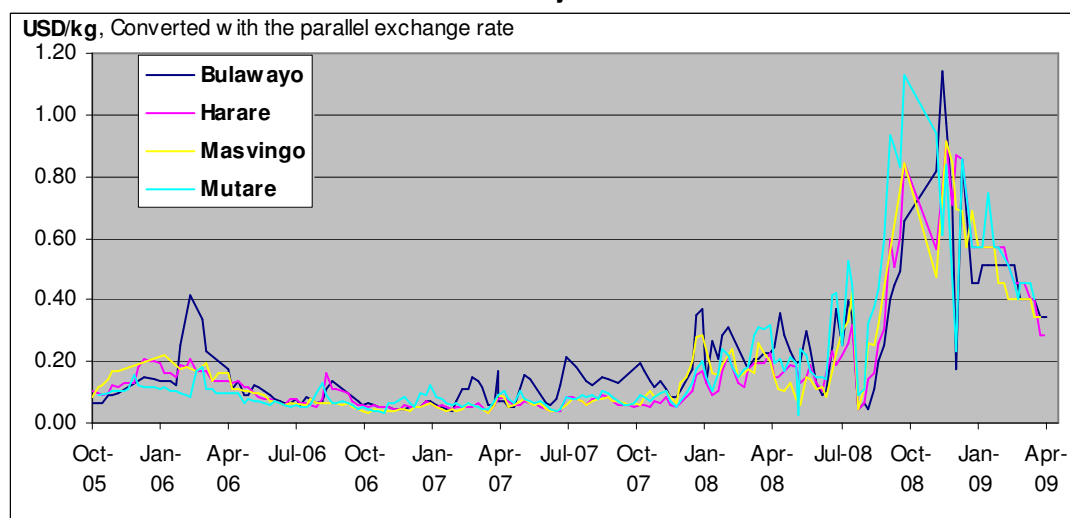
Up to January 2009, the Grain Marketing Board (GMB) had the function of being the official body for buying and selling maize and wheat in the country. During the 2008/09 marketing year, procurement prices were set several times during the year. Typically the price appeared quite attractive the day it was announced but lost its relevance in a few weeks. For example, in October 2008 farmers would have received USD 1 for 1 tonne of maize delivered at GMB depot at their own expense. Also, often payments were made not in cash but by transfers into the recipient's account. By the time the money was withdrawn it had lost its value substantially. For these reasons not much maize and wheat was delivered to GMB. For example, GMB bought locally 36 121 tonnes of maize in 2008, and none in 2009, as compared to 544 000 tonnes in 2006 and 172 000 tonnes in 2007. Similarly, only 11 795 tonnes of wheat were purchased during 2008 and 832 tonnes so far in 2009, whereas on average some 150 000 tonnes were bought locally each year between 2004 and 2007. Last year wheat farmers were promised a part of their payment in USD. These payments have still not been made and farmers are not able to plant anymore wheat this year for lack of capital to buy seed, fertilizer and pay for other inputs. For all these reasons the current liberalization of grain markets is welcome by most farmers. Its impact for the next season, however, would depend on how it works out in reality.

Under the new economic reform GMB is expected to compete with other traders. However, it is negotiating resources from potential financiers. Selling grain to GMB will depend on the net price (i.e. the floor price minus the transport cost to deliver to GMB depot) offered and whether GMB can make cash payments. Reportedly there are some traders in the market currently buying at USD 180 to 200 per tonne, much below GMB's announced floor price of USD 265.

Maize retail price: As can be seen from Figure 3, the maize price fluctuated between 0.05 and 1.15 USD/kg between October 2005 and April 2008. Prices were often higher in Bulawayo compared to the other cities. Between July 2008 and December 2008, price levels increased tremendously even in the US dollars. This corresponds with the soaring of cereal prices globally but the rise in Zimbabwe was skyrocketing due to the widespread shortages of maize in the market. Since December 2008, price decreases have been equally dramatic reaching a level below 0.30 USD per kg by April 2009. This harvest time price level is still much above the prices during 2006 and 2007. Removal of import restrictions, early harvest from a relatively good crop and the considerable amount of food assistance distributed in the country since January 2009 have resulted in price reduction in most markets.

During the Mission in early May, the price of maize was 2-4 USD per bucket (0.12 – 0.24 USD per kilogram) in rural markets.

Figure 3: Zimbabwe - Evolution of the informal market retail price of maize in USD/kg, in four major cities



Based on the above graph, it seems that maize markets are well integrated, with the exception of Bulawayo, located in a deficit production area, where periodic price spikes are observed. As shown in **Annex 2**, the main provincial markets for maize are all reasonably well integrated with the market in the provincial capital.

Rural consumer markets: The major basic food commodities such as mealie meal, maize grain, cooking oil were available in all rural markets visited. These are mostly locally produced commodities and some imported commodities (e.g. sugar, rice, etc.). Turnover of goods (food and non-food) was relatively high at the time of interviews, compared with the market situation around the end of 2008.

Prices, all in USD or ZAR have generally been going down, especially over the last 6 months. Given this as the harvest time they are seasonally low but they are much higher than the same period in past several years. Due to the dollarisation, formal trade appears to be increasing and displacing petty traders.

It seems that, provided there is sufficient purchasing power, traders will be able to respond by bringing in food to most rural areas, assuming that the liberalization of the import policy is not changed drastically. However, transportation costs can be significant, which will add to the basic prices in remote markets. The terms of trade between maize and an animal seem to be back now at the normal seasonal levels. The scarcity of cereals at the onset of the most recent lean season (November 2008) resulted in terms of trade which were very unfavourable, more than the usual seasonal swing, for those needing to purchase grain by trading cattle or other animals. It is expected further that households that depend predominantly on livestock and cash crops might gradually see their terms of trade worsen. The same situation will affect households that depend on casual labour. Therefore the policy of allowing food and cereals imports is important to stabilize domestic maize prices around the import parity price. However, households' purchasing power is still compromised by the lack of access to foreign currencies in many rural areas.

5. CEREAL SUPPLY/DEMAND BALANCE, 2009/10

Zimbabwe's cereal supply/demand balance for the 2009/10 marketing year (April/March) is shown in Table 11 and is based on the production estimates presented in earlier sections and the assumptions/justification provided below.

- **Population** - Using the 2007 projected CSO estimate from the published 2002 Census document, the implicit growth rate of 0.3 percent and the estimated out-migration of about 900 000 as explained in Section 2.1, the population for 2009, for the purposes of this report, is estimated at 11 million.
- **Stocks** – Following one of the worst years in terms of the total cereal production, the GMB-held government stock levels as of 1 April 2009 are negligible. There was a significant drawdown the year before. Privately held stocks (by farmers and traders) are assumed to be low, given the extreme shortages of maize during the past year. Given the relatively improved harvest this year some stock build-up is assumed by way of the slightly higher year closing stocks.

- **Human consumption** - Per caput cereal consumption of 158 kg per annum, distributed across cereals as -- maize 120 kg, millet and sorghum 20 kg, wheat 16 kg, and rice 2 kg -- is used this year. The total is the same as last year. Over the last several years the apparent consumption of wheat, more in line with the national production, has gone down significantly. Given this trend, consumption rates of these are adjusted upwards. There is some evidence that other commodities, in particular sweet potatoes, groundnuts and potatoes, may have substituted for wheat. On the other hand, millet and sorghum production is estimated to increase this year. At 158 kg of cereals per caput/annum, about 70 percent of the minimum calorie needs of a person (at 2 100 kcal/day) would be met, on average. The remainder, as usual, is expected to come from other foods such as potatoes, sweet potatoes, beans, groundnuts, meat, poultry, fish, vegetables and wild foods.
- **Feed use** - Given the large and widespread shortages of grains, in general, use of cereals for animal feed is quite limited. Moreover, livestock numbers on commercial farms have significantly declined over the past years. However, for the use of dairy cattle and poultry the quantity of maize to be used as feed is required. Thus given the much improved domestic production this year, compared to the year before, the amount of grain to be used as feed during this marketing year is reset at the usual 150 000 tonnes. Last year this was reduced to 100 000 tonnes in the face of extremely low grain production.
- **Seed use** – The use of hybrid maize seed produced by local seed companies or imported has gone down due to their high cost and need for foreign currency. When this seed is not available on time many farmers resort to using retained grain. Seed requirements are calculated by using the recommended seed rates and forecast area to be planted next year and are included in the total utilization. Seed rates used are – 25 kg for maize, 10 kg for sorghum and millets and 125 kg for wheat. Some 20 percent is added to account for potential replanting.
- **Post-harvest losses** – These are assumed at 5 percent of production for all grains. This is the same rate as the last three years. This rate, which is lower than that assumed more than three years ago, is used because of the drastic reduction in cereal production in the last few years. It is recognized that the losses at individual farm level vary a great deal depending on the storage conditions but, given a significant shortage of the domestic production and much shorter duration of storage, this minimal percentage loss is considered appropriate.
- **Cereal import capacity** – Given the grain market liberalization since the beginning of this marketing year the private sector is expected to play a major role in imports of maize (as whole grain or milled), wheat and rice. The major miller/trading company in the country is National Foods. It has significant storage and milling capacity in Harare, Bulawayo, Masvingo, Gweru and Mutare. Similarly, Blue Ribbon Foods, another milling and trading company also has significant capacity. Spar, a grocery chain operator, is able to import to satisfy the national demand as well. The biggest problem for all of them is financial liquidity, either cash or credit lines. However, judging from their performance since last September, when the import restrictions were being removed and the use of USD or Rand by public became widespread, they were able to import enough to meet the demand in most parts of the country. It was learned that financial constraints were overcome by the major traders by making innovative arrangements with the foreign exporters. Some importers also have parent companies in South Africa which are able to provide financial backing. Hence their import capacity for this marketing year could be as shown in Table 10. The role of GMB is still being defined. It is also expected to act as a private miller/trader but it lacks financial assets. Still, given their infrastructure and vast network, they may be able to cater for certain niche markets, either as a private or public importer. Hence a small amount of imports are assumed as part of the total commercial imports. However, it is difficult to forecast imports under the changing economic circumstances in Zimbabwe, hence it would be necessary to monitor and update these estimations periodically.

In addition to the formal imports it is recognised that many individuals, groups, companies (for their employees) and petty traders import significant quantities of cereals and cereal products in small amounts through informal channels and in-kind remittances, especially from South Africa and possibly from Mozambique and Zambia. These “grocery bag” types of imports are not recorded even at the monitored border posts. Similar to other years a total amount of about 58 000 tonnes is assumed in the balances as potential commercial imports from all cross-border informal sources. With the dollarisation, it is possible that this amount may go down this year but as long as it remains as a part of the total effective food demand in the country, it will simply shift to more formal imports.

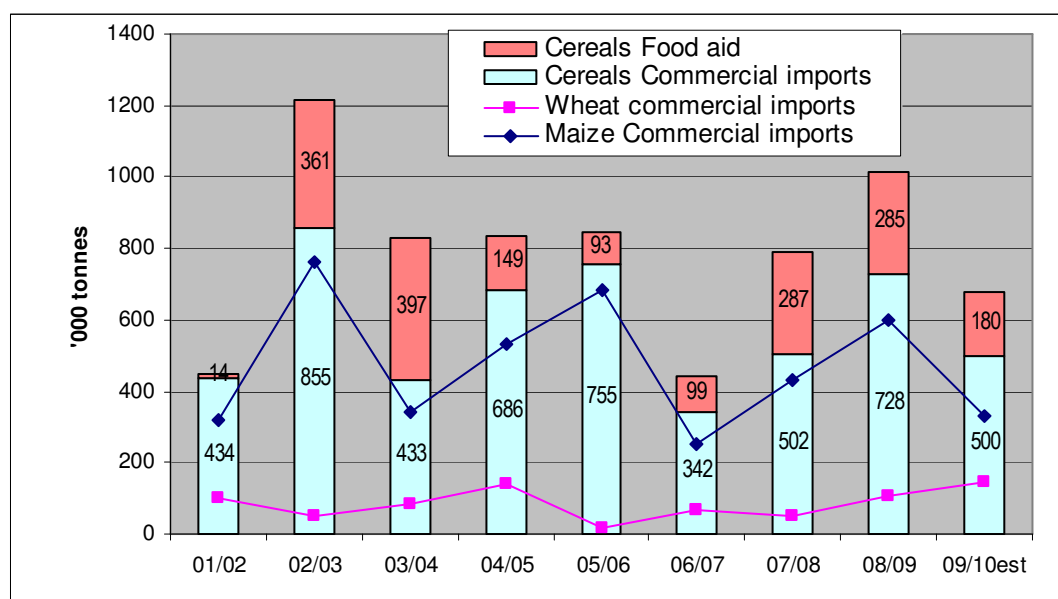
Thus, in conclusion, the Mission assumed that the private and public sector should be able to commercially import about 330 000 tonnes of maize and 145 000 tonnes of wheat.

Table 10: Zimbabwe - Commercial import capacity for maize and wheat in 2009/10

Source	Comments	Maize	Wheat
Major national traders/millers (National Foods, Blue Ribbon Foods, SPAR Grocery Chain, etc.)	National Foods –imported 66 000t maize and 20 000t wheat during Aug 08-Feb 09; expected volume next year 10 000t/month on average; Blue Ribbon - Maize target next year 5 000t/month on average; max capacity 15 000; SPAR - High turnover responding to consumer demand; mostly mealie meal.	280	120
Cross-border, informal	Small traders, buying groups, individuals	40	18
GMB imports	Depending on the availability of funds	10	10
Total industry capacity to import in grain equivalent	Total effective demand in domestic market would depend on the number of people lacking purchasing power.	330	148

These import requirements for 2009/10 are put in a historical context in Figure 4. Zimbabwe imported record quantities of about 837 000 tonnes of food grains commercially during 2002/03, of which maize accounted for 764 000 tonnes, according to GMB statistics. Since then, commercial imports of maize have varied, with the lowest being 251 000 tonnes in 2006/07. Besides the food aid, much of these imports were managed by GMB, so this year it would be the first time in more than a decade the private sector would be engaged in importing main cereals.

Figure 4: Zimbabwe - Cereals - Commercial imports and food aid imports, 2001/02 to 2008/09 and estimates for 2009/10



Sources: For 2001/02 to 2008/09 - Commercial imports from GMB, Food aid from WFP; for 2009/10 CFSAM Mission estimation.

Table 11: Zimbabwe - Cereal Supply/Demand Balance, April 2009/March 2010 (000 tonnes) ^{1/}

	Maize	Millet-Sorghum	Wheat	Rice	All Cereals
Domestic Availability	1 146	235	13	0	1 394
Opening stocks	6	5	1	0	12
Total production ^{2/}	1 140	230	12	0	1 382
Utilization	1 626	245	182	22	2 074
Food use	1 320	220	176	22	1 738
Feed use	150	0	0	0	150
Seed use	48	6	2.3	-	56
Losses	57	12	0.6	-	69
Closing stocks	50	7	3	-	60
Total Import Requirements	480	10	168	22	680
Anticipated commercial imports	330	0	148	22	500
Uncovered deficit	150	10	20	0	180
<i>Of which food aid on hand/in pipeline</i>	<i>20</i>	<i>4</i>	<i>3</i>	<i>0</i>	<i>27</i>

^{1/} Although the resulting estimates represent the most likely scenario, given the uncertainty of each parameter in the balance sheet, there may be significant variation in the actual outcome. However, given the size and nature of the sample, showing confidence limits or range estimates with certain levels of probability is not possible. It is therefore recommended that this balance sheet be revised and updated as the underlying assumptions and conditions change during the year.

^{2/} Similar to last year, maize production includes estimated 25 000 tonnes from urban and peri-urban plots throughout the country (CFSAM 2008).

Barley production is not included in this food balance sheet since most of it is used for commercial brewing purposes.

- Negligible or none.

Note: Calculations computed from unrounded data.

With the resulting supply/utilization figures presented in Table 11, there remains an uncovered national cereal deficit of about 180 000 tonnes, which would need to be covered by international assistance. This is further discussed in the following sections; this food gap is placed in the context of food aid requirements in Section 6.8. However, given that there is now new market and economic liberalized environment in the country, care should be taken to make sure that food distributions do not distort the local markets or provide disincentives to farm production and private trade development.

6. HOUSEHOLD FOOD AND NUTRITION SECURITY

6.1 Food security status and prospects

Household food security in general is expected to improve markedly as compared to previous years, mainly due to the improved production in most areas as a result of favourable rainfall amounts and distribution. However, the production at household level did not reach its potential due to poor availability and access to seeds and fertilisers which resulted in late planting and cultivation of smaller plots for subsistence farmers. The change in policies related to movements of food and use of foreign currencies has resulted in improved availability of cereals in local markets. However, prices remain comparatively high for most households who do not have easy access to foreign currency. The team did note that many of the basic foodstuffs available on the markets were produced in Zimbabwe, indicating a drastic reduction in imported foodstuff compared to six months ago.

But the improvements in the production and policy are still not enough to significantly improve household food security. This is due to the still poor state of the economy resulting in high food prices, unemployment, low wages and lack of access to foreign currency. Moreover, the Government's capacity to import food to satisfy aggregate domestic requirement will continue to be restricted by shortages of foreign exchange, which will likely result in reduced availability of food on the local markets once household stocks are finished as most rural farming households did not produce enough to last through to the next season. Other important compounding factors include HIV/AIDS that has affected production (labour) and access (increased health expenditure and reduced income) at the household level and food utilization for the individual. Poor water and sanitation and healthcare related issues also provide an important backdrop to the unfolding food insecurity.

This year's improved production comes after two consecutive years of very poor production where most rural households struggled to survive, so the previous state of high food insecurity still prevails. This is principally because most of the households had no food stocks carried over from last year and many households reported excessive sales of their assets (e.g. livestock) to cope with the effects of last year's situation. However, the effect on households and individuals is expected to vary across the country because of variation in production, and differences in alternative livelihood activities and coping strategies available to

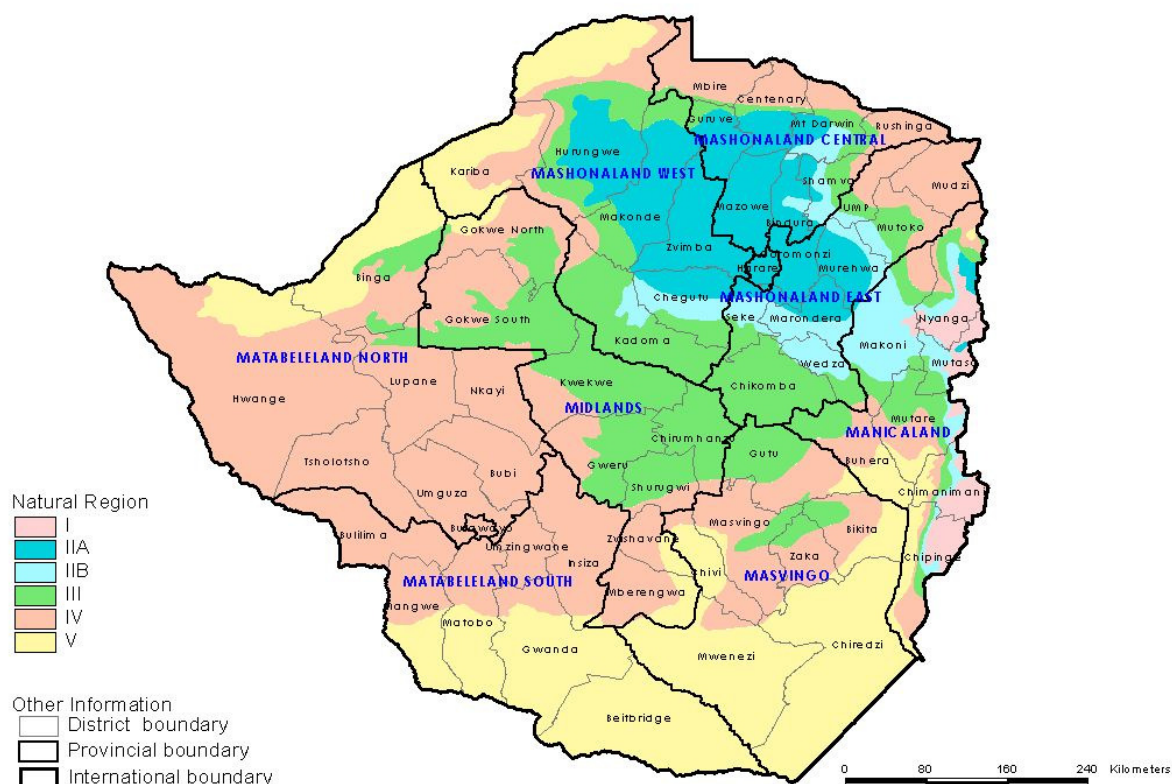
the households. As will be discussed, there will also be variations in the way households in rural and urban areas will be affected.

6.2 Household livelihoods

6.2.1 Rural provinces

The main livelihoods in the different provinces and districts are defined by the agro-ecological zones depicted in Map 1. At one extreme, the districts in Matabeleland South fall in Agro-ecological Zones IV and V and those in Matabeleland North fall predominantly in Zone IV. Livestock dominates the livelihoods in the two provinces. At the other extreme, the Mashonaland Provinces (East, West and Central) have large tracts falling in Zone II (A & B) that are suited to crop production. Manicaland has tracts of Zone I and Zones IIB suitable for crop production and patches of Zones III, IV and V that support mixed agricultural production. Masvingo Province shares some characteristics of Matabeleland (Zones IV and V), but with patches of Zone III. Meanwhile Midlands Province lies mainly in Zones III and IV.

Map 1: Zimbabwe Agro-Ecological Zones



In general, crop production (food and cash crops), livestock rearing or a combination constitutes the primary livelihoods in the rural provinces. These livelihoods options in turn define most of the secondary livelihoods options – such as employment on commercial farms and game reserves. The existence of mineral deposits and mining in some provinces (e.g. Masvingo, Mashonaland East, Midlands, Mashonaland West) and game ranging (e.g. in Matabeleland North and South) provide alternative livelihoods and the thrust of coping strategies available to households in the different provinces. These livelihoods and coping strategies are summarised according to province in Appendix 1. They are also discussed in details below and form an important factor in the analysis of the food insecurity situation.

6.2.2 Urban and peri-urban areas

About 30 percent of Zimbabwe's total population lives in urban and peri-urban areas. An estimated 60 percent of this urban population is concentrated in two urban provinces of Harare and Bulawayo. The remaining 40 percent live in the main towns of the rural eight provinces and in peri-urban districts. Agriculture continues to be one of the important sources of livelihoods for the majority of households in the peri-urban and high density areas after petty trading, cross border trading and self employment. In the

January urban assessment, 56 percent of the interviewed households grew maize during the 2008/09 agricultural season, with the highest proportion of households in Mashonaland Central (82 percent) and the least in Matabeleland South (30 percent). On performance of the maize crop, 65 percent of the households reported that their maize crop was in a better condition this year than same time last year (ZimVAC Jan 08).

The proportion of households reporting having someone who supports them from time to time declined from 28 percent in 2006 to 19 percent in 2009 (ZimVAC Jan 08). Despite the economic hardships at that time, 64 percent of interviewed households reported giving assistance in the form of food and/or money to other family members outside the household.

The current national cereal production may affect urban households primarily during the lean season (Jan-March 2010) while there will be secondary effects through higher prices despite significant imports as well as the impact of the global financial crisis on wages, which will make it difficult for households to access enough food. The prospects for these are uncertain in the light of the changing macroeconomic situation and the removal of restrictions on private trade in cereals. In addition, urban agriculture has been affected by lack of timely access to inputs as well.

6.2.3 Migration and remittances

In the Matabeleland provinces, more people rely on remittances from Botswana and South Africa than in most other provinces. The many empty homesteads observed while travelling in these provinces indicate that many natives of the region are living and working elsewhere while keeping a residence in Zimbabwe. In Masvingo and Midlands provinces, movement to urban areas is reported to have declined, but migration to other countries for employment is on the rise, even if opportunities there are less attractive because of the global economic crisis. Also in Manicaland, there is out-migration, caused by the containment of illegal diamond panning. In the rest of the country, emigration did not change or there are even people coming back because of the perceived improvement of the situation in the country. Some indicate loss of jobs as the reason, while others seem to be attracted again by their farms compared to the high living costs in urban areas.

Overall, it is estimated that a large number of Zimbabweans are abroad to work there, as mentioned under 2.1, estimates range from 350 000 (CSO) to 3 million (RBZ).

6.3 Household food access

The most important source of food for household consumption in rural areas is from own production, for provinces and districts that mainly produce food crops. But in livestock-rearing provinces and districts such as the Matabelelands, market purchases of food are the most dominant sources. In districts dominated by cash crop production, food purchases also form significant component of households' access to food. In general, food purchases have become a very important feature of household food access in most of rural Zimbabwe, especially in recent years of low production. While GMB used to be the official trader, buying from and selling to households, informal trade (referred to as farmer-to-farmer trade) also takes place. Barter trade, including exchange of livestock (mainly small ruminants) for grains, and providing labour for cereals have been widely reported. Through the liberalisation, private traders and millers will now become important elements of the cereal markets.

6.3.1 Access to food through own production

As mentioned above, agricultural production during the 2008/09 season was relatively good, in most of the country, thanks to excellent rainfall distribution and this in spite of lack of inputs. In particular the inputs from the SADC-supported programme for small, mainly communal, farmers came late. Moreover, soils in communal areas tend to be less productive and the some teams observed very basic farming practices; all of these resulting in lower maize yields by communal farmers, estimated by AGRITEX at 0.54 tonnes per hectare on average, much lower than the yield in other farming sectors.

Because of lack of food during last lean season (September 2008 – March 2009) many farmers consumed already part of the immature, standing crop. Moreover, the current cereal harvest seems in many cases to be the main source of cash income and parts of the harvest were sold (generally at prices between USD 0.10 and USD 0.20 per kg for the moment) to cover expenses for other basic needs such as school fees and health expenses. It seems from the field visits that in many areas communal farmers will run out of food stocks from their own production by September-October 2009.

6.3.2 Access to food through alternative sources of income

Besides food from their own farms, most communal farming households rely also, as stated before on other sources of livelihood such as cash crops, vegetable growing, casual labour, remittances and (illegal) gold panning. These usually help them to provide for their basic needs. Overall, the Mission found that the outlook for the year is better than for last year, which is in line with the findings of the provisional results from the ZimVac Interim Rural Food Security Assessment of May 2009, which also attributes the improvement to the better cereal production.

However, under the current economic circumstances, many of these complementary livelihood activities in rural areas are less reliable. Casual labour opportunities with large farmers (seasonal crops, tea or forestry plantations) depend on these farmers' financial situation and the extent of their seasonal crop. Seed and inputs for winter crop production may not be available or accessible; irrigation water is not readily available to most households while overall production and transportation costs are high.

Remittances are also declining: government employees in the cities receive currently only an allowance of USD 100, putting pressure on the eventual amounts they could send to relatives in the country side and the global economic crisis puts stress on income of the Zimbabweans in the Diaspora, leaving them less to be sent home. Crack down of 'illegal' activities such as gold or diamond panning may affect some households.

Throughout the country, and especially in the dryer agro-ecological zones (IV – V), livestock is very important. The crisis of last season caused livestock to move from poor, communal farmers, to richer farmers and partly to the cities for slaughter. Many households from communal areas saw their livestock holdings last year drastically reduced or even wiped out through distress selling of animals, leaving these households even more vulnerable.

Cotton is a key cash crop for small farmers and is currently bought for 0.15 to 0.18 USD per kilogram. Unless the price increases, some farmers will not even bother to harvest the standing crop. Workers in mines (Matebeleland) may be retrenched because of the global crisis affecting demand and prices of raw materials.

The uncertain situation of these alternative income sources is ultimately a threat to the food access of many households in communal areas, once the produce of the current harvest exhausted. It is impossible to predict the evolution of these factors with certainty and monitoring of the situation is recommended. A thorough assessment at the start of the lean season would give a better understanding of the situation and the needs of the population and the support required.

Food access in other farming sectors seems not to be an issue, but in some cases, A1 farmers have similar problems as the communal farmers.

6.4 Nutrition, food consumption and HIV/AIDS

A Combined Micronutrient and Nutrition Surveillance Survey (CMNSS) was carried out in Zimbabwe in October 2008. The survey also included modules on household food security. The overall findings show levels of acute malnutrition to be slightly higher than previous surveys but still below the 10 percent threshold for an emergency. However, the household food security indicators, namely consumption based on dietary diversity and food frequency, showed an increase in the percentage of households with poor consumption from 26.3 percent in 2007 to 29.7 percent in 2008 and thus reflecting the deteriorating food security situation in the country.

According to the November 2008, CMNSS the prevalence of wasting or acute malnutrition in Zimbabwe was 4.4 percent, ranging from 6.9 percent in Midlands to 1.8 percent in Harare. These levels may appear surprising considering the severe economic crisis going on in the country. However, they may be more of a reflection of the very complex situation in the country.

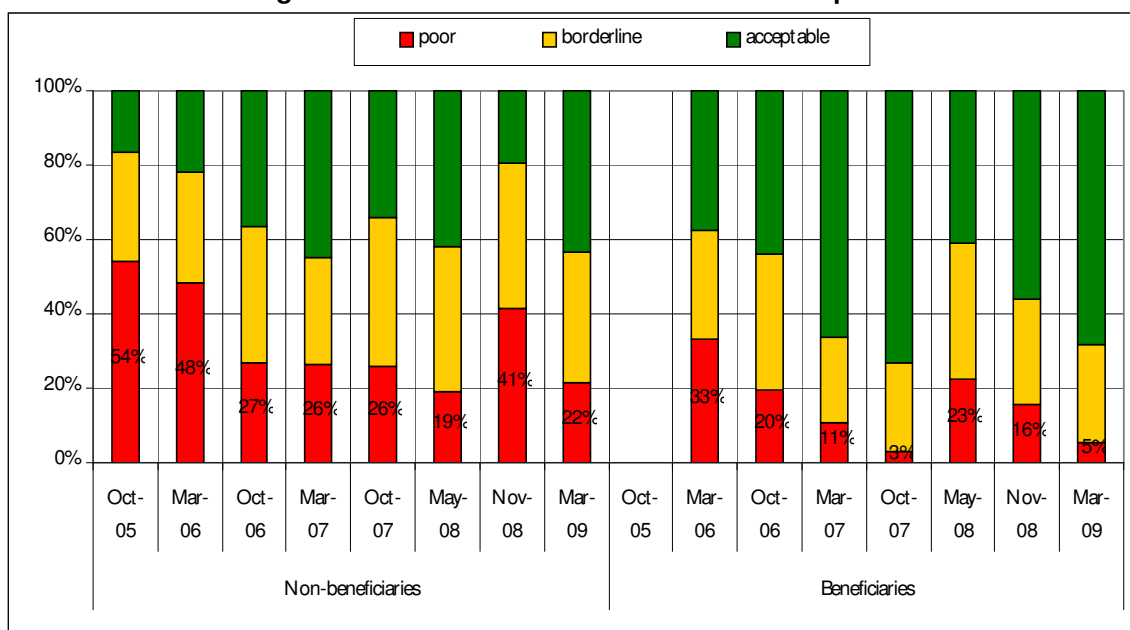
- The prevalence of wasting has remained stable over the past 3-4 years as measured by the 2005/06 DHS, the 2007 NaNSA and the 2008 CMNSS – all nutritional surveys with national coverage. Historically, from the 2005/06 DHS, wasting in children less than three years of age has remained at around 6-7 percent for the 1994, 1999 and 2005/06 DHS surveys.
- However, from the same analysis, stunting, or chronic malnutrition, has increased steadily in the same group of children (< 3 years) from 21 percent in 1994, to 28 percent in 2005/06. Thus the impacts of the economic crisis, a slow-onset emergency, are likely manifested in increases in child stunting rather than wasting.

- Despite the economic crisis, deliverance of basic services such as child immunization has remained adequate with 74 percent of children 12-23 months of age being fully immunized (CMNSS, 2008).
- Historically, Zimbabweans have enjoyed excellent access to education and health care. The mothers of the children in the 2008 CMNSS would have been born anytime from 1963 to 1993 and according to the UNICEF office, good caring practices of mothers have been a factor in lower wasting and child mortality in that context.

6.4.1 Food consumption

Using dietary diversity and food frequency and calculating a food consumption score, the CMNSS found that nearly 30 percent of the households had poor food consumption which was higher than 26 percent during the same period in 2007 (see Figure 5). The greatest changes were found in Mashonaland West (20 percent to 44 percent) and Matabeleland South (20 percent to 44 percent) provinces while Harare remained the same (around 3 percent) and Masvingo improved (29 percent to 26 percent).

Figure 5: Zimbabwe - Trends in Food Consumption



Source: WFP Zimbabwe, Community and Household Surveillance (CHS)

Comparing these findings to the March 2009 Community and Household Surveillance (CHS) which covers the WFP operational areas in the country (about 3.5 million rural households), 22 percent of non-beneficiary households had poor consumption, a decrease from 41 percent in November 2008 and close to the 19 percent in May 2008. For beneficiaries, only 5 percent had poor consumption, compared to 16 percent in November 2008 and 23 percent in May 2008. The trends are presented in the chart above. The chart indicates that among non-beneficiaries, food insecurity is severe; the situation of November 2008 is among the worst seen during the last 4 years. Most beneficiaries, on the other hand, have the benefit of acceptable food consumption, since vulnerable households are targeted this can be attributed to the food aid received. Future food aid should be better targeted to include more food insecure who are currently non-beneficiaries.

6.4.2 HIV and AIDS

According to World Health Organisation and UNAIDS⁴, in 2007, the estimated adult HIV prevalence is 15.3 percent which is down from 26.0 percent in 2001. There are an estimated 1.3 million adults and children living with HIV in Zimbabwe. The estimated number of HIV-related deaths in 2007 was 140 000, which was also down from 150 000 in 2001. The estimated peak of deaths due to HIV was in 2004. The same source estimates that there are around 1 million children in Zimbabwe (< 18 years) who have lost one or both parents to HIV and AIDS. Geographically, the highest rates of HIV infection are found in Matabeleland South (20.8 percent) and Manicaland (19.7 percent).

⁴ UNAIDS/WHO Epidemiological Fact Sheets on HIV and AIDS, 2008 Update

In 2007, it was estimated that there are 89 sites providing anti-retroviral treatment (ART) to around 98 000 adults which is only about 19 percent of the estimated 570 000 adults living with HIV and AIDS.

6.5 **Food insecurity - categories of households**

6.5.1 Chronically food insecure households

These households tend to be food insecure regardless of the performance of the production season and overall food supply situation. They are households who cannot grow their own food or purchase sufficient food, even at regulated prices. These include: elderly-headed households, families hosting orphans or with disabled or chronically ill members, those with high levels of dependants, child-headed households and the destitute who lack any resources. Those who fall within this group need continued safety net type of support.

6.5.2 Transitory food insecure households

These households are those who are normally food secure but will not be able to meet their food needs through to the next harvest, mostly due to inadequate production and/or sales of production to meet other needs due to lack of alternative livelihood opportunities. They also include households unable to purchase food in the market due to lack of access to foreign exchange or because of the deterioration in their terms of trade for livestock or wage labour. The latter group includes the marginalized and landless working on commercial farms. The last group includes former farm workers from former large scale commercial farms and are now classified as the Mobile Vulnerable Populations (MVP) and some are currently receiving food assistance and farming inputs from various agencies. In addition, some of the people who were previously employed in the formal sectors (factories and industries) and who have been made redundant due to closure of factories as a result of the global financial crisis are also in this category.

6.5.3 Regional distribution of food insecurity

According to the “provisional results” from the ZimVac Interim Rural Food Security Assessment⁵ of May 2009, some districts have no deficit in access to food for the coming year (unlike last year): in Mashonaland Central (Bindura, Mazowe), Mashonaland West (Zvimba), and Matabeleland South (Umzingwane).

Table 12: Zimbabwe - Population living in rural wards affected by a food access deficit, 2009

Provinces	Number of food deficit months				
	10-12	7-9	4-6	1-3	Total
Mashonaland East	78 385	416 041	485 532	53 986	1 033 944
Mashonaland Central	-	124 961	142 203	238 759	505 923
Mashonaland West	-	197 369	226 806	132 514	556 689
Masvingo	22 741	167 029	544 154	465 815	1 199 739
Midlands	-	91 266	535 023	236 317	862 606
Matabeleland North	-	78 080	277 442	235 651	591 173
Matabeleland South	27 396	38 775	119 812	219 330	405 313
Manicaland	98 299	418 127	363 090	184 667	1 064 183
Total population of deficit wards	226 821	1 531 648	2 694 062	1 767 039	6 219 570

Source: Provisional results from the ZimVAC – May 2009.

The ZimVAC also provisionally identified districts with poor access, especially in the North-East of the country in the districts of Mudzi, Mutoko, UMP (Mashonaland East), Rushinga and Mt. Darwin (Mashonaland West). They coincide with poor cereal production. Some of these districts were visited by the Mission, which concurs with those classified as having sufficient food access but have some doubts about the perceived severity of the food deficit situation in the districts in the North-East of the country. An assessment before the beginning of the lean season (Aug. 2009) should bring more clarity. Based on the provisional ZimVAC data, Mashonaland East, Masvingo and Midlands and Manicaland have more people who are living in food-access deficit wards.

⁵ Please note that these results are strictly provisional and are still being reviewed by various ministries. The figures are subject to change based on inputs from technical ministries.

6.6 Food assistance requirements

The food security situation in 2009/10 will pose a challenge for the traders (Grain Marketing Board and private traders and importers) and Department of Social Welfare - that respectively have to ensure food availability and manage assistance programmes for the most needy.

6.6.1 Support to food supply

The extent to which the market players will be ready for the challenges is uncertain. They should ensure food availability on markets for households that can afford to purchase. Private traders and Grain Marketing Board (GMB) have the physical capacity to provide for sufficient food availability in the markets but lack currently the financial resources to operate at the scale required. In order for food supply to be sufficient, the current liberal import policy should be continued and GMB, importers and traders should be able to access financial resources for their operations.

6.6.2 Support to the food insecure

Even if food is available, households that do not have sufficient access to food should be assisted in a timely manner. Food assistance will contribute to averting increases in child malnutrition and, erosion of household productive assets. Food assistance should be targeted to reflect the situation of households: targeted relief assistance to the transitory food insecure through vulnerable group feeding (VGF), school feeding, or assistance to chronically food insecure groups including households affected by HIV and AIDS, those hosting orphans and vulnerable children (OVC) and mobile and vulnerable populations (MVP) in rural and urban areas. The general view is that much of the food assistance for transitory food insecure households should be in the form of food-for-work (FFW/FFA) programme for households whose members are able to work, but this depends on the possibility to launch such programmes at the required scale to reach those in need.

Also, given the transitory nature of the economy, refinements to the number of people who will be in need of assistance during this period and the nature and level of assistance to mitigate the situation can only be made when the "full" rural food security assessment is conducted in August 2009 by the Zimbabwe Vulnerability Assessment Committee (ZimVAC).

This section builds on previous analysis of the extent of food insecurity and how the situation will evolve until the next harvest season.

6.6.3 Population in need

During the Mission more than 40 community discussions were conducted distributed over many rural wards in all provinces (34 in communal areas, 6 among A1 farmers and 2 in old resettlements). Based on their responses, most communities would run out of food from their own production between June and September 2009. It is the opinion of the Mission, based on the observations in the wards visited, that in reality produce may last longer, on the average up to October 2009. There seems to have been some respondent bias fuelled by the expectation of assistance. Figures 6 below shows the change in food access strategies related to the duration household food consumption needs will be met by their own production. Food assistance is the only access strategy for communities where production lasts only a few months. And for those where production lasts much longer, the communities plan to rely on only casual labour to meet their needs.

Figure 6: Zimbabwe - Food access strategies in wards visited by the CFSAM, in relation to the duration of own food production

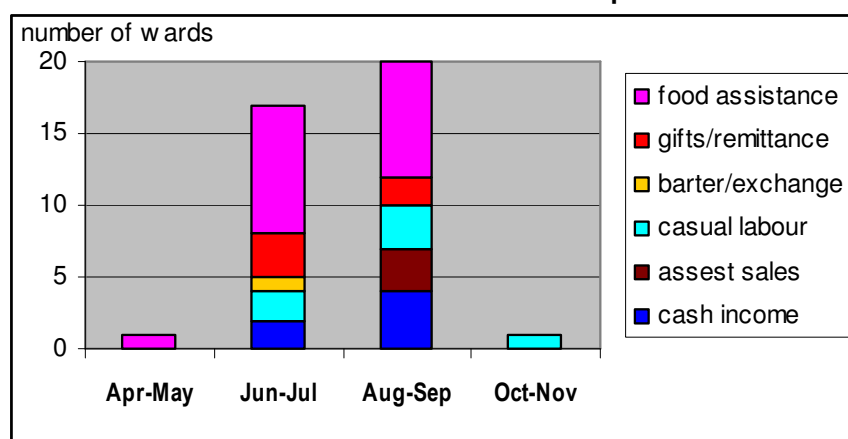


Figure 7 shows main food access strategies by agriculture sector for the wards visited by the mission, highlighting that the communal farmers will rely on a number of different strategies but with a focus on transfers such as food assistance, gifts and remittances as they tend to have poorer production.

Figure 7: Zimbabwe - Main food access strategy in wards visited by the CFSAM, by agricultural sector



Based on the above, the Mission projects that in rural areas food assistance would be required mostly in communal areas. Assistance would roughly be needed by 40 percent of communal households⁶. Most households expect to have consumed all of their produce between June and September, leaving a gap for some starting in July, for others starting in October, and lasting until March 2010, assuming that food can be harvested next April. It is the opinion of the Mission that, taking into account alternative access strategies, a gap from October until March would exist (6 months on average).

It is estimated (see 2.1) that the effective population of Zimbabwe is 7.6 million in rural areas and 3.4 million in urban and peri-urban areas (see 2.1). In the rural areas, 75 percent⁷ are living in communal farm areas. 40 percent of the communal population suffering food insecure, including 7 percent which is chronically food insecure⁸ and an additional 33 percent will suffer of transitory food insecurity during 2009-10, for an average of about six months. This amounts to 2.28 million chronic and transitory food insecure people in rural areas. Moreover, targeting of food for education programmes in communal areas could reach around 85 000 school children.

The urban ZimVAC assessment of January 2009 estimated that 30 percent of the urban areas were food insecure, but because of the improved economic situation, the Mission assumes that half this number, or 15 percent is currently food insecure. Seven percent of the urban and peri-urban population is considered chronically food insecure, and additional 8 percent is transitory food insecure and would need support during

⁶ The 52 percent of communal wards is revised downwards to 40 percent of the communal population as a correction for respondent bias.

⁷ based on AGRITEX (see CFSAM 2008), 76 percent of farmers in 2006 were communal farmers

⁸ According to the UNICEF Survey of Oct 2008, 12 percent households are comprised of at least 80 percent dependents. More than half of them can be assumed chronically food insecure (7 percent), the remainder will be among the transitory food insecure

around six months. In addition 170 000 school children could be targeted by urban food for education programmes. This amounts a total of 680 000 targeted people in urban areas.

Table 13: Zimbabwe - Summary of population in need

RURAL		Rural population:	7 600 000
Communal farmers	75%	of rural population	5 700 000
Total Food Insecure	40%	of communal population	2 280 000
of which Chronically FIS	7%	of communal population	399 000
and Transitory FIS	33%	of communal population	1 881 000
<i>Targeted School Children</i>	<i>1.5%</i>	<i>of communal population</i>	<i>85 000</i>
URBAN		Urban population:	3 400 000
Total Food Insecure	15%	of urban population	510 000
of which Chronically FIS	7%	of urban population	238 000
and Transitory FIS	8%	of urban population	272 000
<i>Targeted School Children</i>	<i>5%</i>	<i>of urban population</i>	<i>170 000</i>

These assumptions would result in 2.79 million food insecure persons plus 255,000 school children, and a total food assistance of 228 100 tonnes, under various modalities as seem appropriate. Full rations would be needed, over a 6 month period for the transitory and year round for chronically food insecure. The urban gap is assumed to be only half the food ration, based on local food security experts. Details on timing, targeting and duration will be updated after the ZimVAC assessment in August 2009.

Table 14: Zimbabwe - Estimated beneficiaries and quantities of food assistance

	Beneficiaries	Ration (kg/month)	Months	Food (tonnes)
RURAL				
Chronically FIS	399 000	12	12	57 456
School feeding	85 000	5	10	4 250
Rural Transitory	1 881 000	12	6	135 432
URBAN				
Urban Chronic	238 000	5	12	14 280
Urban Transitory	272 000	5	6	8 160
School feeding	170 000	5	10	8 500
TOTAL	3 045 000			228 078
			<i>cereals:</i>	<i>190 065</i>

The above calculations are only provisional and provide merely indicative estimates, to allow a comparison with the previous section. As stated earlier, the interim ZimVAC results are still being discussed within the Government among technical ministries.

These numbers are based on the assumption that the economy will continue to gradually improve and more opportunities will become available. If the economy would deteriorate, food assistance would have to be revised upwards; if on the other hand the situation in rural areas would rapidly improve, the assistance requirements would have to be revised downwards.

In view of the lack of access to foreign currencies in the rural areas and the possibility that private traders will be able to supply food products, the opportunities for cash and voucher programmes should be explored, but these possibilities should be confirmed by the proposed August ZimVAC assessment. However, the limiting factor for these programmes will be the scale of these interventions during their necessary pilot phase, insufficient to reach all beneficiaries.

Food for work is also an option, because of its self-targeting properties for households with unemployed members. The Department of Social Welfare so far implemented only projects at a very small scale (less than 500 beneficiaries); hence, the scale of such interventions may be challenging.

6.7 Recent actions to address food insecurity

6.7.1 Department of Social Welfare

The Department of Social Welfare (in the Ministry of Public Service, Labour and Social Welfare) has the responsibility to provide assistance to households who are vulnerable or in need. The categories identified as chronically food insecure individuals: i) female-headed households, elderly-headed households, child-headed households; ii) households with a disabled member and with chronically-ill members; iii) households with orphans and vulnerable children; and iv) destitute households.

The Department of Social Welfare implements two broad types of programmes related to food security: i) Public Assistance Programme (PAP) for vulnerable households. ii) Public Works Programme (PWP) that targets able bodied vulnerable households to participate in labour intensive public works provided by local authorities. The PAP is intended for all categories of vulnerability discussed earlier and covers assistance in the form of cash transfers paid on average costs of the basic food basket. There are currently 15 000 households registered on the Departments Register for the Public Assistance Programme. However for the current year, there are no disbursements that have been done as the Department still awaits budgetary allocation from Treasury.

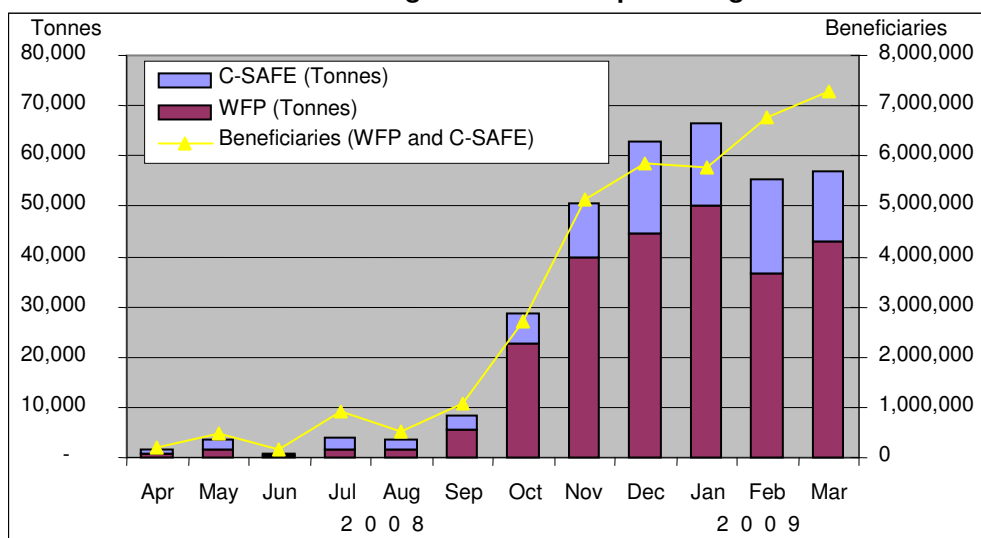
The Department is currently designing a new safety net project named Agricultural Social Safety Net Inputs Programme with 800 000 targeted households. This is aimed for small holder or rural farmers who normally do not receive any support from sources such as ASPEF to receive an input starter pack comprising of 10kg maize/small grain seed, 50kg basal fertilizer and 50kg top dressing fertilizer enough for production on one acre. The Programme will be attached to the Drought Relief/Public Works Programme in terms of implementation and operational structures that include use of District Drought Relief Committees.

In 2008/09 it was established that the value of the payments had been so severely eroded by inflation that consequently, most households did not bother to utilise these services because the associated costs such as transport were several times higher than the value of the transfers.

6.7.2 The World Food Programme

The World Food Programme is the largest agency providing food assistance in the country. WFP's food assistance programmes in the country include Vulnerable Group Feeding (VGF) which supports transitory food insecure in rural areas who have exhausted their own production and do not have income-earning opportunities. At its peak last season (Oct 08-Mar 09), WFP reached around 4.5 million people through the VGF mechanism. WFP also supports, through its Safety Net (SN) program, chronically food insecure populations. On average, around 600,000 people were reached through this program over the last 12 months. This group (SN) includes mobile vulnerable populations (MVP); orphans and vulnerable children (OVC); home-based care (HBC) and people on Anti-Retroviral Treatment compliance programmes.

Figure 8: Zimbabwe - Beneficiaries served and quantity of food delivered through WFP and C-SAFE during the 15 months preceding the CFSAM



The graph indicates that large increase in food aid volume and beneficiaries over the last 12 months. It should be noted however, that aid typically is delivered during the lean season. During the peak of the preceding lean season, February 2008, WFP alone reached 2.65 million beneficiaries with 42 thousand M. Tonnes of food.

6.7.3 C-SAFE

C-SAFE is a consortium of three agencies; CARE, World Vision and CRS and is the second largest food assistance group in Zimbabwe, with its own food pipeline, which reached a total of around 2 million beneficiaries by March 2009. Some of their programmes include safety net programmes, Food for Agriculture, Food for school services, and school feeding but are predominantly carried out after or before the “lean season”.

6.8 Relationship between estimated national food deficit and food assistance needs

This report estimates the national uncovered food gap (imported food aid in cereals) at 180 000 tonnes (shown in Table 11) and the food assistance needs of the food insecure people in the country at about 190 000 tonnes of cereals (shown in Table 14). Therefore by and large there is consistency in these figures. The difference of 10 000 tonnes is expected to be within the margin of error in both estimates. The national shortage is still a problem in the country and, therefore, external food aid is in part seen within the context of overall domestic availability. However, given that the lack of access to basic food because of declining purchasing power, assistance to the food insecure population is more determined by their household food gap than the national food gap in cereal production.

7. RECOMMENDATIONS FOR FOLLOW-UP ACTIONS

7.1 Recommendations related to agriculture

In order to enhance the capacity to increase food production and improve food security in the country, the Mission considers the following issues as important ones in the short term to long term:

1. The Mission recommends emergency assistance by the Government and the international community in acquiring fertilizer and quality seed for delivery in September 2009 for the main season.
2. Various mechanisms of assistance, such as credit lines, contractual guarantees, etc. should be put in place to ensure local supply of high quality inputs and development of the country's input industries (seed and fertilizer in particular).
3. Conservation agriculture is gradually gaining acceptance in some areas thanks to the efforts of the extension service, and most farmers who have adopted the approach are pleased with the results. The approach should be further encouraged.
4. Field extension agents are generally well informed and conscientious, but they are constrained by a shortage of transport. Improvement of their transport facilities, such as provision of bicycles, motorcycles, fuel, etc., would extend their coverage to a larger number of farmers and could be expected to increase agricultural productivity.
5. There are a number of small-scale irrigation schemes around the country that require rehabilitation, and, it would appear, a number of situations where new schemes could be established. Investment by the Government and donors in such schemes would increase agricultural productivity and alleviate the hardships suffered by some communities during dry years.
6. For a country with a large number of cattle and other livestock, Zimbabwe's veterinary service is seriously under-resourced, as evidenced by this year's increased mortality from a number of diseases. As well as ownership assets, cattle are important to small farmers as tradable commodities and for land preparation; most of Zimbabwe's agricultural land is cultivated using oxen. Support from the Government and donors is therefore needed to ensure the health of the national herd. Cracked and leaking dips need to be repaired, new dips need to be constructed, and an adequate stock of acaricides and other prophylactic chemicals should be guaranteed. Vaccination programmes should be supported through the provision of staff training, transport, vaccines and cold-chain facilities.
7. Given the uncertainty of imports in the new economic environment the Mission recommends that the national cereal balance sheet be reviewed and updated periodically; the Food Security Technical Working Group (FSTWG) may perform this task with contributions from relevant stakeholders including WFP, C-Safe, GMB and the private sector. In any case, the Government should monitor

the targets and the progress of private sector imports and be ready to carry out its own imports to ensure food security across the country.

8. Finally regarding the crop assessment by Agritex, it is recommended that the methodology used rely more on the instrument based measurements of field area and crop yields rather than the visual observations and interviews. This implies that the staff would need to be provided with access to and training on the use of GPS units, weighing scales, etc. The use of GPS units in this year's CFSAM significantly improved the accuracy of the estimates of area planted at the farm level. This led to a 6 percent national average reduction in provincial area figures.

7.2 Recommendations related to household food security

The main recommendations to emerge from the CFSAM in relation to household food security and programme response are:

1. Expansion of existing food assistance programmes to address the needs of the chronically food insecure through support to households affected by HIV and AIDS, those supporting orphans, the destitute and the Mobile Vulnerable Populations (MVP).
2. Since the food security situation and its contributing factors are very dynamic the situation should be monitored to assess the needs of the transitory food insecure. The 'Full' Rural ZimVAC assessment should be conducted in August 2009, when the situation will be more stable and the early lean season will be setting in. This assessment will provide a clear understanding of the extent and severity of the anticipated food insecurity situation. In addition, a food security monitoring system such as an adaptation of WFP's Community and Household Surveillance (CHS) should be established within the ZimVAC in order to track the situation throughout the year.
3. Based on the findings of the proposed August 2009 ZimVAC assessment, programmes should be designed to target those in need of assistance until the next harvest. It is recommended that the Government engages the humanitarian community to direct its programmes of assistance to those in need. A number of organizations (UN and NGOs) have been providing humanitarian assistance in many parts of the country, and geographical redirection and readjustment of their programmes, so that the neediest households are included, would be necessary to effectively and efficiently respond to the food insecurity situation. Government agencies should work in close coordination with the international community.
4. WFP along with other agencies and the Government need to strengthen targeting in order to reach those that are the most vulnerable. Profiling of the most food insecure population groups and consequent targeting mechanisms should be one of the areas of focus for the proposed ZimVac assessment.
5. Livelihood support in the form of inputs should also be considered to support households growing vegetable and other crops on irrigation schemes or in low lands. Access to finance for A2 and LSCA farms will allow them to employ more farm labour during the upcoming agricultural season.
6. The Mission also recommends that the Government continues its policy of low import tariffs on cereals to improve availability at local level. Any increase of tariffs would have a negative impact on food security.

ANNEX 1

Provincial profiles for agriculture and livelihoods

Manicaland

The season started with some showers in October, but effective rainfall started between mid-November and mid-December. Rains finished between February and April in most areas, but there were also some significant rains in early May. December saw excessive rainfall in some limited areas, but in general the province's rainfall distribution was much better than last year. Most farmers used retained seed, while others received theirs from the Champion Farmer programme, various NGOs and SADC, though most of the seed and fertilizer received from SADC arrived too late to be useful. Much of the Champion Farmer programme seed was said to have germinated very poorly and some farmers had to replant or gap-fill. Many farmers in receipt of food grain used this as seed. There was very little fertilizer use. Shortages of animal draught, tractors, subsidised fuel, labour and cash were all cited as constraints to production. Armyworms were reported in some districts, and tobacco farmers, especially those with small holdings that restrict their use of the recommended four-year rotation, complained of an increase in nematodes. Nevertheless, all crops did better this year than last. Maize production more than doubled, despite a 40 percent reduction in area, and sorghum, with a similar reduction in area, returned a slightly higher production than that of 2008. The area under millet doubled. The prospects for wheat are poor because of financial liquidity problems, low profitability and a shortage of inputs, and winter vegetable gardens are faced with reduced irrigation access because of lower-than-usual water tables. The provincial authorities report some reduction in overall livestock numbers, the result of crisis selling at the end of 2008 and mortality from disease. However, livestock condition and pasture availability at the time of the Mission were fair to good, while the livestock water situation was fair. Dipping facilities remain seriously inadequate, and tick-borne diseases, especially red water, are common.

The greater part of the province is high maize producing area, but productivity in the northern part is generally low. Cash crops such as tobacco, citrus fruits, bananas, apples, timber, tea and coffee are produced in the northern half where there are opportunities for farm labour on plantation. The southern part is a dry lowland area with low productivity. Households supplement their incomes through livestock sales, casual labour, craft work and gold panning.

Mashonaland East

Effective rains started in mid-November to early December and mostly finished in March, except in Natural Region 4 where the rains stopped in February. There was a dry spell in some areas in February, especially in the extreme north and south of the province (Mudzi, Mutoka, Chikomba, lower Hwedza), which adversely affected December plantings. Some late rains were received in early May. Most land was planted using retained seed. An estimated 30 percent of the land was sown to certified seed. Other sources of seed included the Champion Farmer programme, SADC, FAO, various NGOs and the market. However, market prices were high and seed was generally unavailable in retail outlets; some farmers complained that the Champion Farmer programme delivered seed with poor germination and seed of varieties that were not suited to their area in terms of length of season. Fertilizer use was low, especially in Communal Areas. The area under maize was similar to that of 2007/08, but with higher yields (0.73 t/ha) than last year, production rose by almost 50 percent to 168 000 tonnes. Surplus-producing farmers and those who need to turn part of their harvest into cash are now faced with the problem of where to sell their produce since GMB, which offers a floor price and should be the buyer of last resort, has negligible amounts of cash. As with maize, increased sorghum yields brought about a more-than-threefold increase in production. Farmers reported a general shortage of animal draught labour, tractors and subsidised fuel. An outbreak of armyworm was contained in Hwedza. The areas under soya, groundnuts and sunflower all increased this year, while those under cotton and tobacco declined. There has been a small increase in the numbers of farmers using conservation-agriculture techniques. There appears to have been a net reduction in cattle numbers, attributable to crisis sales for slaughter at the end of 2008 and increased mortality from disease. The livestock dipping situation continues to be seriously inadequate, and tick-borne diseases are especially common. Outbreaks of anthrax were controlled with the assistance of FAO; blackleg is common. Otherwise, livestock condition is generally good, and the pasture and water situation is fair to good.

The province has one of the most fertile lands in Zimbabwe and is suitable for intensive crop cultivation and livestock herding. Parts of the province rely on small grain production and cash crops including sunflower, cotton and tomatoes. Peri-urban communities grow horticultural crops to supplement income from formal

employment. Households supplement incomes through cash crop sales, vegetable gardening, casual labour and gold panning.

Mashonaland Central

The rains came slightly later than usual in most parts of the province, and there was a short dry spell at the end of January. Nevertheless, rainfall distribution was markedly better than last year. The area under maize was 11 percent down on that of last year, but the area under sorghum increased by an estimated 63 percent so that more than one-fifth of the summer cereal area was planted to small grains. With maize yields more than double those of last year, maize production was almost twice that of 2008. The areas under cotton and tobacco also increased. Most farmers used retained seed though many received seed from the Champion Farmer programme, SADC and various NGOs. SADC seed arrived too late for planting; consequently many households used it for food and some retained it for planting next season. Fertilizer use was low, and top-dressing was in especially short supply. Some minor armyworm outbreaks were reported in Rushinga and Mount Darwin, and quelea birds were a problem in the lower Zambezi Valley. The prospects for cereal production during the winter months are poor, with farmers citing high production costs, low profit margins, the uncertainty of the power supply for irrigation, and the lack of credit lines as principal disincentives. There were reports of significant livestock sales in food-insecure areas such as Rushinga, Mount Darwin, Mzarabani, Mbire, and of some herd building in A2 and commercial areas (Bindura, Mazowe) However, livestock numbers are considered to have fallen overall, indicating that many sales were for slaughter.

The province has one of the most productive communal lands, producing both food and cash crops. Maize is the dominant crop. However, the main sources of cash income include cotton, tobacco, sunflower, soya beans and sugar beans production. Employment on A1 and commercial farms is also an important source of livelihood. Poor households depend equally on their own crops, daily wages from casual labour, selling of sugar cane and gold sales to make ends meet.

Mashonaland West

There was a timely start to the rains and despite a short dry spell in early February the season was considered to be the best for at least four years. The area under maize showed a marked decline of more than 40 percent. However, with average maize yields of 1.26 t/ha (the highest of any province this year, and four times as high as the province's average last year) production, at 234 000 tonnes, was two-and-a-half times that of 2008; this was the highest provincial production and constituted about 20 percent of national production. The area under sorghum increased three-fold. The areas under cotton and tobacco were down on last year because of last year's problems with payment for the harvest. A2 farms benefited most from the distribution of inputs, while input shortages were most evident in communal areas and A1s. SADC's basal fertilizer arrived in late January. It is estimated that at least 50 percent of farmers used either retained seed or food-aid grain as seed. Summer cereal production was, in general, much better than last year, and significantly better than that of Mashonaland Central. Cotton was more susceptible to *Fusarium* and *Alternaria* this year as a result of a shortage of compound L fertilizer, which has a high potassium content (potassium offers some protection from disease); in its absence, compound D, which has a lower potassium content, was used. The prospects for winter cereal production are poor because of financial liquidity problems, low profitability and shortage of inputs. Dipping facilities for livestock are seriously inadequate and there is also a shortage of acaricides. However, the pasture and water situation for livestock is relatively good.

The main livelihoods include intensive crop cultivation and rearing of livestock. The main crops produced are maize, cotton and tobacco. Better-off households are generally self-sufficient in cereals; poor households depend on own production and daily wages to make ends meet. There are also opportunities to work on mine around the Great Dyke, fishing in Lake Kariba, gold panning and chrome picking.

Midlands

The rains started in mid-November when about 65 percent of planting was carried out. There was a dry spell from the end of January into early February, and the rains finished early in April. The season's total rainfall was less than last year, but distribution was much better. It is estimated that only 10 percent of farmers used certified seed, while more than 25 percent used retained seed, and 15 percent used food-aid grain as seed. Other input sources included the Champion Farmer programme, NGOs, FAO, and SADC; SADC inputs arrived too late to be useful, so many farmers decided to keep them for the next season. Only 15 percent of the cereal land is thought to have had fertilizer applied to it. More than 80 percent of the cropped land was prepared using animal draught, while tractors accounted for 12 percent, and about 4 percent was prepared

manually. Farmers complained of shortages of tractors, subsidised (and un-subsidised) fuel and spare parts, and of shortages of animal draught and labour. Conservation-farming techniques have been adopted on about 2 percent of the cropped land. Unlike in all other provinces except Masvingo, the area under maize this year increased significantly compared with last year. At 272 000 ha the maize area was the largest of all eight provinces. Average maize yields also increased, but from a very low level of 0.1 t/ha last year. Both the area under sorghum and crop yield increased more than threefold to give a provincial production of 29 000 tonnes, the highest of all eight provinces. The area under soya increased, while that under cotton declined. Midlands has more large-scale commercial farms than any other province (more than 100), and this year saw an increase in the utilisation of arable land in the A1 sector. An outbreak of armyworm was controlled in Mberemba District. Wheat production is expected to be less than half of what it was last year because of financial liquidity problems, the high cost of production, input shortages and lack of confidence in the reliability of the electricity supply for irrigation. Despite a slight improvement following an increase in the amount of acaricides imported from China, the livestock dipping situation remains seriously inadequate.

The province experiences dry spells in Natural Region III, resulting in variable production of maize, sorghum, groundnuts and limited millet. Livestock is more prominent in the other half of the lowland rural economy. Cash income is also derived from cotton, groundnuts, sweet potatoes and horticulture, as well as casual labour on commercial farms. Other livelihood strategies include gardening, petty trade, beer brewing, sales of curios and gold panning.

Masvingo

The start of the rains in mid-November was followed in some areas by a dry spell in late November and early December which necessitated some replanting and gap-filling. The rains continued in most places until the end of March, though some districts received rainfall until mid-April. Though total amounts were less this year than last, the rainfall distribution was distinctly better. Farmers complained of shortages of maize seed, fertilizer, animal draught, tractors, subsidised (and un-subsidised) diesel for tractors, and labour. Only about 10 - 15 percent of maize land was planted to certified seed; most farmers used retained seed, and an estimated 15 - 20 percent in some districts (e.g. Gutu) used food-aid grain as seed. Most land was prepared using animal draught; for example, in Mwenezi District, animal draught accounted for 90 percent of land preparation while tractors were used to cultivate only 2 percent. There has been an increase in the number of farmers, now estimated at 8 percent, using conservation-farming techniques. Unlike in all other provinces except Midlands, the area under maize this year increased significantly compared with last year, and with substantially better yields the province produced about 120 000 tonnes. The area under sorghum also increased slightly, and with better yields production increased almost fourfold relative to 2008. Millet production, at 27 000 tonnes, was the highest of all eight provinces. Quelea birds were a problem on sorghum and pearl millet in several areas. The area under cotton declined this year, apparently with a shift towards small grains. Winter crop prospects are poor, largely because of the lack of liquidity resulting from last year's foreign-exchange portion of payment for the wheat harvest not having been received yet. Despite seriously inadequate dipping facilities, livestock condition is good to very good, pasture is good, and the situation with regard to water is adequate.

Most of the land is suitable for both crop and livestock production. The main crops grown are maize and millet and also some lowland cash crops. Other crops that are grown include soya beans, sugar beans, groundnuts and sweet potatoes. Casual employment on sugar plantations provides an important source of cash income to buy food for the poor; better-off households (owning goats and cattle) sell livestock. Other livelihood strategies include beer sales, gold panning, remittances from migrant workers and peanut butter production.

Matabeleland North

The rains started between mid- and late November and continued till mid- or late March. Distribution was generally good despite some excessive rainfall in Bubi in December and a dry spell in Nkayi in January. Most farmers used retained seed for their cereal crops, and very little hybrid seed was used. Fertilizer use was also very limited. SADC inputs generally arrived too late to be useful. Farmers complained of shortages of draught power and labour for weeding. Quelea birds were a problem especially for small grains and in Lupane and Tsholotsho elephants destroyed some crops. The area under maize decreased this year relative to last, but improved yields meant that production was more than 20 percent up on last year. Nevertheless, Matabeleland North had the lowest maize production of all eight provinces. At 92 000 ha, the combined area under sorghum and millets, which showed a slight increase this year, was larger than that under maize (81 000 ha). Sorghum and millet yields were rather better this year than last, though there was considerable local variation; for example, small-grain yields were good in Nkayi South but poor in Nkayi North. There was

a substantial increase also in the area under sweet potatoes in Nkayi and Bubi, especially in Communal Areas, and in the area under groundnuts in Nkayi. Grasshoppers attacked groundnuts in Bubi. In general, summer crop production was best in Bubi and Nkayi, and worst in Tsholotsho. No winter cereal production is expected, but some households that have access to a source of irrigation practise winter vegetable production in small gardens. Livestock dipping facilities and veterinary support are seriously inadequate, and tick-borne diseases are common. Lumpy skin disease, anthrax (in Nkayi) and blackleg (in Bubi) have all been reported, and cattle deaths recorded.

The principal livelihood activities in the province are crop production and livestock rearing. Formal employment is also found in the mines and on commercial farms. Fishing, wildlife, crafts and carvings are also important sources income. Other sources of income include casual labour on commercial farms, brick moulding, hunting, selling livestock, vegetables and firewood and gold panning in some districts. Remittances from family members form an important part of the income.

Matabeleland South

The rains started in early to mid-November and continued in most area until mid-March. In Gwanda District the rains ended in February, and in Matopo and Insiza some excessive rainfall led to some waterlogging. Most farmers used retained seed for their cereal crops. There was some use of manure, but only limited fertilizer use. Farmers complained in particular of shortages of draught power and labour for weeding, and of the late arrival of SADC inputs. Many practised dry planting, i.e. before the arrival of the rains. Quelea birds were more of a problem here than in Matabeleland North. The maize area fell this year compared with last year, but with improved yields production almost doubled. The areas under sorghum and millets more than doubled this year and yields, especially those of sorghum increased significantly. At 102 000 ha, the combined area under sorghum and millets was larger than that under maize (97 000 ha). There was an increase in the area under groundnuts and roundnuts (Bambara groundnuts, *Voandzeia subterranea*). Farmers in Communal Areas rated this summer cropping season as worse than, or the same as, last year, while farmers in the other sectors rated it as generally better. A number of cattle deaths were reported during the year due to disease and, in Matopo, drought. Lumpy skin disease and abscesses were common. Dipping facilities and veterinary support remain seriously inadequate. Crisis sales of cattle were common at the end of 2008, with households attempting to raise money for, among other things, food and school fees, after a particularly poor harvest last year. As of mid-May, the pasture and water situation was relatively good.

Livestock rearing and production of sorghum and maize are the main livelihoods activities in this semi-arid province. Mopane worm are sold to supplement incomes of the poor. Poor households earn most of their cash income from farm labour in South Africa or on local commercial farms. Other sources of income include hunting of wild game, cross border trading, gold panning, buying and reselling of vegetables, petty trade, selling livestock, cattle heading and remittances.

ANNEX 2

**Table A1: Zimbabwe - Prices in selected rural markets, at the time of the Mission
first week of May 2009**

Province	Mashonaland Central	Mashonaland West	Mashonaland East	Manicaland	Masvingo	Matebeleland South	Matebeleland North
Maize producer price (USD/tonne)	180-200	180-200	265	265	180	--	--
Maize grain (USD/17.5kg bucket)	2-3	2-4	4-5	3-10	3		5
Mealie meal (USD/10kg bag)	3.5 -4	4.5	4.25	5	4	5-6	5.5
Cotton (USD/kg)	0.15	0.15-020			0.15		
Cattle (USD/head)	80-200	100-300	100-150	70-200		100-300	100-450
Goat (USD/head)	15	15-30	15	10-30		10-30	15-35
Fertilizer (USD/50kg)	32	34	29	38-40			
Tillage (Disc ploughing) (tractor hire/ha)	USD 45 + 20 litre diesel	USD 70 + 20 litter diesel	USD 70 + 20 litre diesel	USD 70 (DDF)			
Monthly Wage rate Farm labour	USD 25+ various	USD 10-15+ various	USD 0.5-1 + various	USD 0.5-1 + various			
Casual labour (4/day)	2	2-3			2.5		

Note: Some prices, especially in southern part of the country are reported in ZAR but often converted into USD by using 10 to 1 exchange rate.