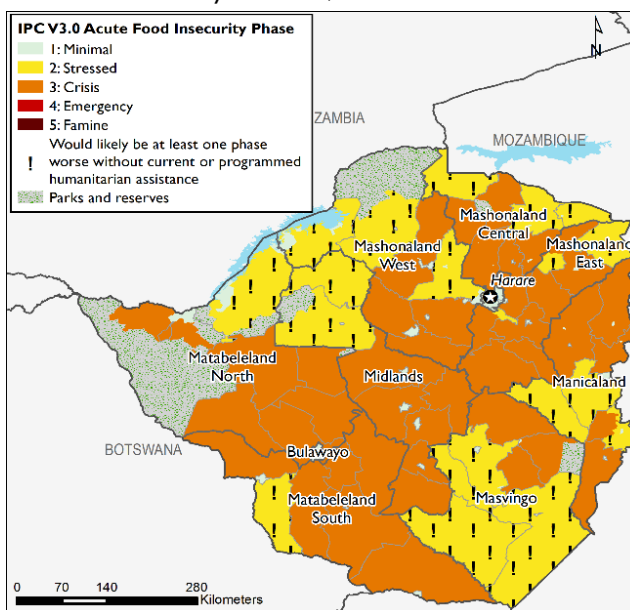


Poor harvests and increasing economic hardships lead to high humanitarian assistance needs

KEY MESSAGES

- Crisis (IPC Phase 3) outcomes persist across much of the country. This is mainly due to depleted household food stocks and to access food households rely on markets with significantly below average purchasing power amidst atypically high and increasing prices. Humanitarian food assistance reached some of the worst drought-affected areas of the country in October. As a result, Stressed! (IPC Phase 2!) outcomes are present in some of these areas. The assistance is expected to be scaled-up during the peak of the lean season resulting in Stressed! (IPC Phase 2!) outcomes continuing in targeted areas.
- Critical shortages of foreign currency in the formal sector continue to drive increases in parallel market exchange rates. This is in turn fueling persistent increases in the costs of basic goods and services, including staple foods. By late October, the local currency was valued at approximately 15.5 ZWL/USD on the official interbank market, about 14.0 percent of its value in February 2019, when the interbank market was introduced. This marks over a 520 percent depreciation of the local currency with higher rates on the parallel market. The depreciation of the local currency (RTGS or ZWL) against the USD continues to impact rural and urban purchasing power and livelihoods.
- Following the 2018/19 drought, crop production was well below average and the country is faced with a 2019/20 national cereal deficit estimated at over 800,000 MT. The 2019/20 rainfall season is forecast to be below average characterized by a late start and erratic rainfall. This combined with the anticipated widespread poor access to agricultural inputs, will likely lead to below average cropped area. A second consecutive below-average season is expected to result in lower than normal livelihood opportunities, household incomes, and 2020 harvest, driving atypically high assistance needs.

Current food security outcomes, October 2019



Source: FEWS NET

FEWS NET classification is IPC-compatible. IPC-compatible analysis follows key IPC protocols but does not necessarily reflect the consensus of national food security partners.

NATIONAL OVERVIEW

Current Situation

Due to very poor macroeconomic conditions and 2018/19 poor harvests, atypically high humanitarian assistance needs exist in Zimbabwe. The Government of Zimbabwe (GoZ) has implemented several measures to address the ongoing macroeconomic challenges facing the country (Annex 1). Despite efforts, the situation continues to deteriorate and remains highly volatile. According to independent sources, including the International Monetary Fund (IMF), the annual inflation rate in Zimbabwe was among the highest in the world in September, at around 300 percent. Other sources indicate the rate of annual inflation could be as high as 500 to 600 percent. The official annual inflation rates published in Zimbabwe were discontinued in June.

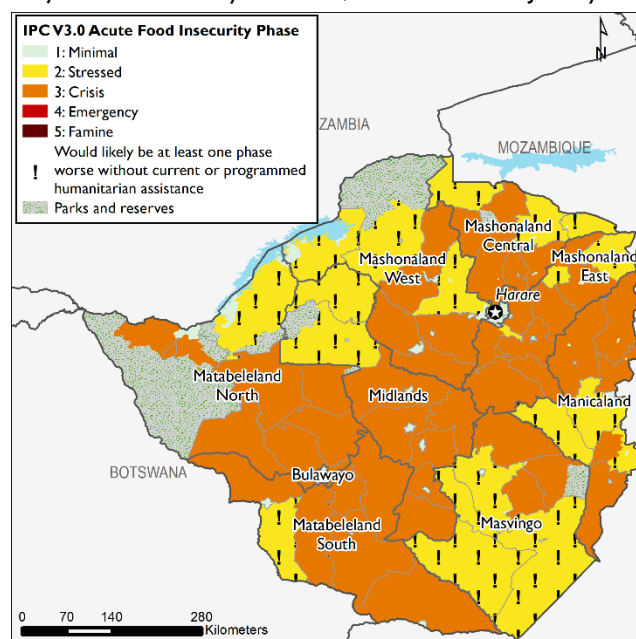
As of late October, the value of local currency – the Zimbabwe Dollar (RTGS/ZWL) – has depreciated by over 520 percent since February 2019, when the interbank market was introduced (Figure 1). The ZWL also depreciated by over 40 percent and 70 percent on the interbank market and parallel market, respectively, since mid-June when the ZWL was declared the sole legal currency. This is mostly due to the continued critical foreign currency shortages, mainly of the United States Dollar (USD) in formal markets. The USD traded around 15.6 ZWL per USD on the interbank market and 21 ZWL per USD against electronic and mobile transfers on the parallel market as the end of October. Shortages of the local currency (bond notes and coins) have resulted in the notes and coins being sold at premium rates as high as 40 to 60 percent against mobile and electronic money transfers on the black market. Most goods and services on the markets have different prices depending on whether a buyer pays with cash (bond notes and coins), electronic and mobile money transfers, or US Dollars. This mainly affects poor households as most businesses and services insist on cash payments. In late-October, The GoZ announced the imminent intent to introduce a new currency in November. The currency will be in \$2 coins and \$5 notes, operating alongside the current bond notes and coins at a 1:1 ratio. This policy is aimed at improving availability of cash to the public as well as curbing the parallel market sale of local cash. Potential market impacts are currently not well understood as the market will need time to adjust.

Additionally, weekly fuel price increases have resulted in petrol and diesel prices escalating about 175 percent and 200 percent, respectively between mid-July and late-October. This has contributed significantly to transport, commodity and other service price increases on the markets (Figure 2). In October electricity tariffs increased by 320 percent, worsening the situation which has been characterized by power cuts lasting long hours daily. This has affected mainly poor households, especially in urban areas through reduced production and incomes, increased prices and household expenditure on alternative energy sources such as firewood, charcoal, and gas.

In addition to the very poor macroeconomic conditions, poor 2018-19 harvests are also driving lower than normal household food access. Zimbabwe's 2018/19 national maize production (officially estimated at 777,000 MT) was 54 percent below last year and 41 percent below the five-year average. Due to the foreign currency shortages and to facilitate grain imports, the government lifted the three-year maize import ban in early October to allow individuals and the private sector to import grain.

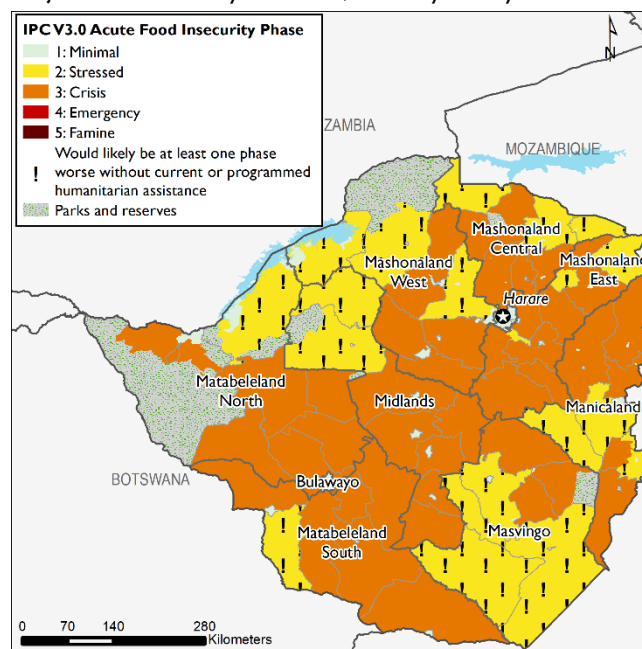
Market demand for maize grain is significantly above average across the country due to below average 2019 production. However, most markets are undersupplied with grain and many households are resorting to maize meal purchases, especially in typical deficit areas in the south, west, and extreme north. In response to the rapid devaluation of the local currency the Grain Marketing Board (GMB) increased cereal (maize and small grain) producer prices to ZWL \$4,000 /MT in

Projected food security outcomes, October 2019 to January 2020



Source: FEWS NET

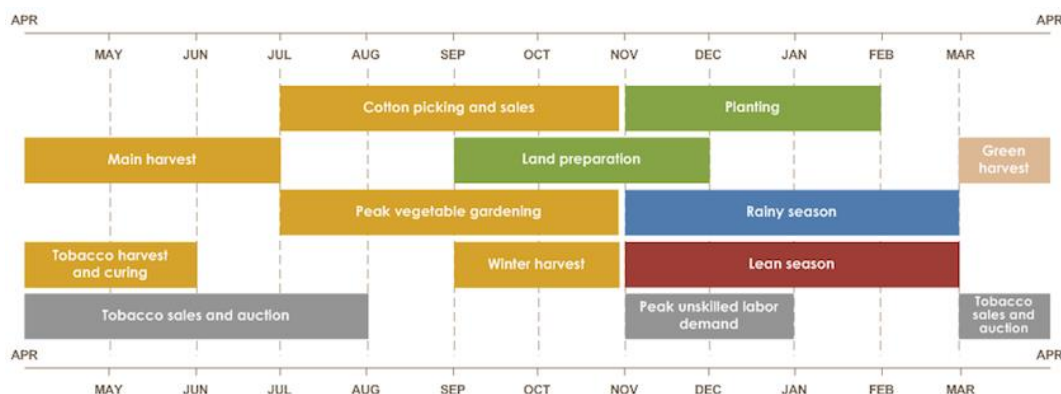
Projected food security outcomes, February to May 2020



Source: FEWS NET

FEWS NET classification is IPC-compatible. IPC-compatible analysis follows key IPC protocols but does not necessarily reflect the consensus of national food security partners.

SEASONAL CALENDAR FOR A TYPICAL YEAR



Source: FEWS NET

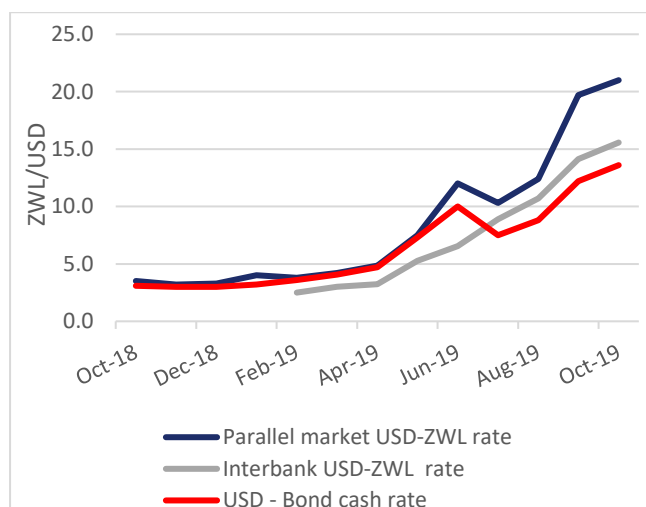
mid-October from the last price set in August at ZWL \$2,100 /MT. This is a 925 percent increase from the ZWL \$390/MT price in February (Figure 3). The GMB announced that it will back pay all farmers who had sold maize or small grains to the government this season. Grain deliveries to the GMB continue to be atypically low. Many buyers including commercial private millers and stock feed manufacturers have been facing challenges accessing grain from the GMB due to short supplies.

Both maize grain and maize meal prices are continuing to rapidly increase and remain well above average (Figure 4 and 5). In October, FEWS NET sentinel markets recorded an average maize grain price of ZWL \$2.53 /kg, about 30 percent above the previous month. October maize meal prices increased by about 20 percent from the previous month to an average of ZWL \$4.72 /kg. Though the demand for maize meal is atypically high for this time of year, effective demand is being constrained by poor household incomes and high and rising prices. Some traders are increasingly demanding only cash for grain as opposed to electronic transfers, which most households do not have. Bread was scarcely available in early October though supplies improved towards the end of the month; however, prices have increased significantly beyond what poor households can afford. Other food substitutes, such as rice and sweet potatoes are similarly unaffordable by most poor households.

As of the end of September, tobacco farmer registrations for the 2019/20 season were 20 percent lower than last year due to an increasingly challenging economic environment and low 2019 prices. Tobacco seed sales were about 20 percent below last year and at their lowest since 2015. National seed cotton sales were reportedly about 50 percent below the same time last year.

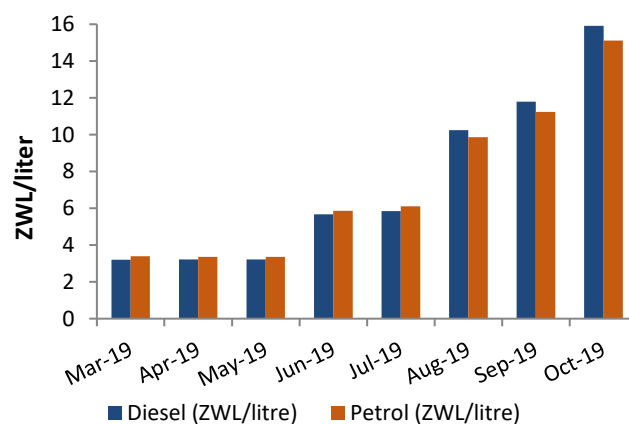
By the end of October, most parts of the country have yet to receive any rains and the 2019/20 cropping has not yet begun. Furthermore, market access to agricultural inputs is very low as many poor households have low incomes and are facing high and persistently increasing input prices. Crop input assistance activities are yet to begin across most parts of the country.

Figure 1. Weekly Exchange Rates of USD to ZWL and Bond Notes from October 2018 to October 2019



Source: RBZ; FEWS NET markets monitoring

Figure 2. Diesel and Petrol prices from mid-August to mid-October 2019



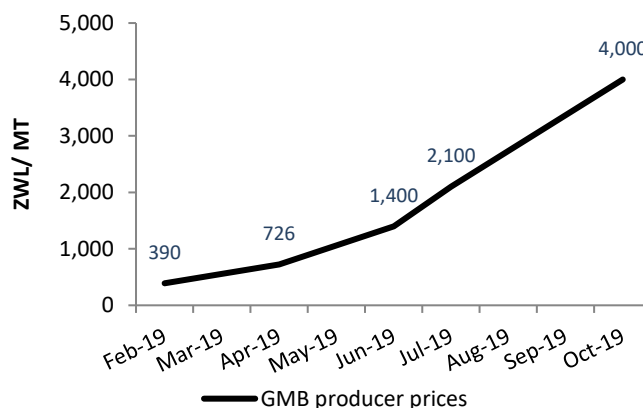
Source: Zimbabwe Energy Regulatory Authority

Water availability and access across most parts of the country is very low and affecting poor households' livelihoods and incomes, including livestock (mostly cattle) productivity and sales. In some areas, typical livestock movements to usual dry season grazing areas are not happening due to overgrazing and below average pasture availability. Most poor farmers cannot afford livestock supplementary stock feeds. Livestock feed is also not readily available on most markets. The high and increasing costs of livestock veterinary drugs is also affecting animal conditions in most parts of the country. Poor cattle conditions coupled with above average disease prevalence are leading to an increased number of livestock sales and deaths, mainly in typical arid parts of the country.

Typical livelihood activities across all livelihood zones are constrained by the poor macroeconomic conditions, impacting many household incomes and access to food, especially for poor households. Typical livelihood activities and sources of income such as casual labor, self-employment, remittances, and livestock sales are below normal. Seasonal activities such as vegetable production and sales and brick molding are also below normal due to water shortages. Petty trading has increased as a livelihood and coping activity; unfortunately, the activity is mainly being affected by lack of capital, high and increasing cost of goods, and low demand for products due to low household incomes. The sale of wild products (fruits, thatching grass, firewood) is also limited. Gold panning activities are reported across most parts of the country, but only benefit small numbers in the population. As a result, poor household income is below average.

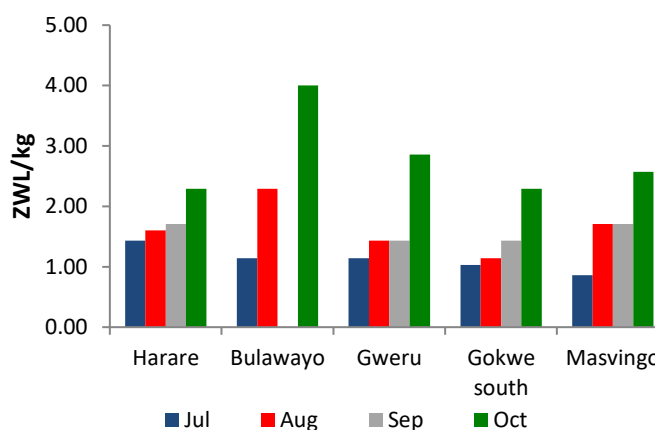
Food consumption patterns in most parts of the country remain poor and continue to worsen. Due to the below average harvest, most poor households across the country have already depleted their own-produced foods and face high and increasing food prices to access market food. As a result, these households are employing consumption coping strategies including reducing the number of meals consumed and decreasing portion sizes, and preferential feeding of children ahead of adults, among others. Currently, a poor household's typical meal consists of cereal (*sadza*) and vegetables (if available). Some members of households are supplementing with less preferred foods and wild foods, though the availability of these foods is below normal given last season's poor rainfall.

Figure 3. GMB prices for maize grain in ZWL/kg



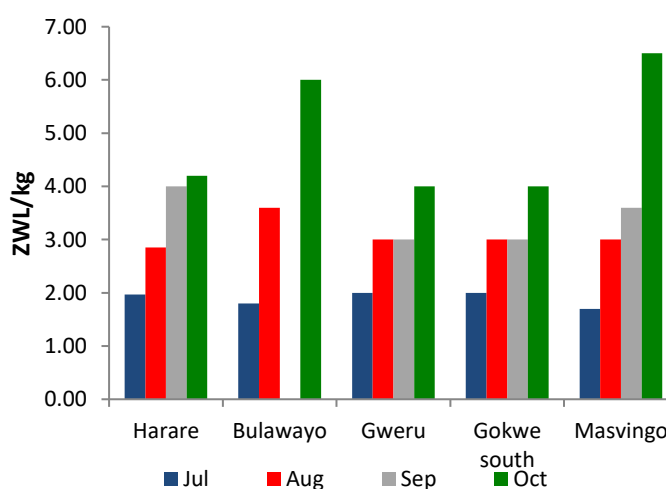
Source: Grain Marketing Board (GMB)

Figure 4. Maize Grain prices in ZWL per kg



Source: Ministry of Agriculture (MoA)

Figure 5. Maize Meal prices in ZWL per KG



Source: Ministry of Agriculture (MoA)

WFP and partners distributed humanitarian food assistance in October, prioritizing some of the worst drought-affected districts. Humanitarian food assistance is preventing more severe outcomes, where now Stressed! (IPC Phase 2!) outcomes

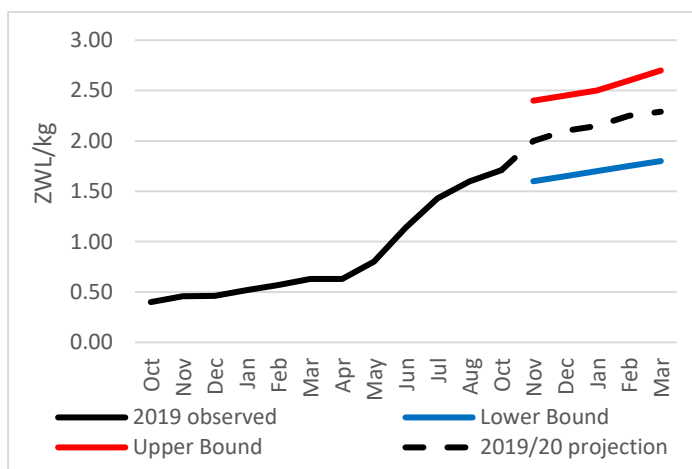
are expected. Although, assistance is reaching far fewer people than the expected national need, and many areas of the country remain in Crisis (IPC Phase 3). These outcomes continue to be present as poor households have limited to no food stocks and constrained livelihoods due to the challenging macroeconomic environment.

Assumptions

The October 2019 to May 2020 most likely scenario is based on the following national-level assumptions:

- The macroeconomic conditions are expected to remain volatile and further deteriorate throughout the outlook period as critical foreign currency shortages in the formal markets persist. As a result, parallel market exchange rates are anticipated to remain above the official interbank market rates and drive further price increases and multiple pricing on the markets. Power shortages and increasing fuel and transport costs are also likely to persist.
- Following the lifting of the three-year maize import ban in early October this year, it is expected that the government and private sector will import maize from mainly international sources as typical regional sources are also experiencing deficits; however, critical foreign currency shortages are likely to limit imports. Consequently, the annual national cereal gap (estimated at over 800,000 MT) is not expected to be fulfilled.
- Markets across the country are expected to be undersupplied with grain through the end of the marketing year. The GMB is expected to serve as a main source of grain especially in deficit areas; however, stock shortages are expected to continue. In the absence of maize grain, an increasing proportion of households are expected to purchase maize meal and other alternative and less preferred foods.
- Maize grain prices are expected to remain above average due to very low supply, high demand, and likely continued depreciation of the ZWL (Figure 6). Maize meal prices and other staples are expected to be above average as commercial millers import their own maize supplies and power shortages and increasing fuel and transport costs are also likely to exert upward pressure on staple food prices.
- Anticipated above average and increasing prices of basic commodities and services are expected to continue to impact livelihoods for all wealth groups, and most severely for very poor and poor households.
- Current international forecasts indicate the start of the 2019/20 rainfall season will most likely be delayed and erratic with below average cumulative rainfall for the season. As a result, pasture and water availability for livestock are likely to remain lower than normal throughout the projection period. Furthermore, due to below average access to agriculture inputs and poor start to the 2019/20 season, area planted for crops is expected to be below average. Fall Armyworm (FAW), among other pests and diseases, is likely to negatively impact crop production. As a result, the 2020 green and main harvests anticipated to start in April, are most likely to be below average.
- Water availability and access challenges for human consumption and livelihood uses are likely to continue throughout the projection period, though some improvements are likely during the 2019/2020 rainfall season.
- Cattle conditions through December are expected to be poor to very poor in arid areas; although livestock conditions will also be poor in typical high rainfall areas, this is expected to a lesser extent due to some pasture availability in these areas. Availability and access to supplementary stock feeds and veterinary livestock drugs are expected to remain lower than normal. Cattle deaths are expected to be atypically high, until pasture lands regenerate in typical semi-arid parts of the country due to the lack of adequate water and pastures as well as high disease prevalence. Small livestock are expected to be generally in good to fair condition, though conditions in the most critical semi-arid districts may be poor. Livestock conditions are expected to marginally improve with the start of the rainfall season in November/December.

Figure 6. Price Projection for Maize Grain at Mbare Market, Harare



Source: FEWS NET

- Livestock prices between October and December are likely to remain below normal due to poor body conditions, especially for cattle, and below-average demand. In January livestock prices are expected to increase as body conditions start improving although prices will likely remain below normal. Livestock-to-grain terms of trade will be highly unfavorable to farmers selling their livestock. This is due to below average livestock prices against significantly above average cereal prices. Bartering of livestock for grain or basic commodities is anticipated at below normal levels due to poor grain availability and high prices and shortages of basic commodities.
- In-country remittances will remain low and below normal; those from outside the country, specifically South Africa, are likely to be below average due to below average labor opportunities and recent xenophobic attacks in that country.
- Incomes from both agricultural and non-agricultural labor are expected to remain below average throughout the projection period. This is based on anticipated limited opportunities for in-kind and cash payments, and the expectation for another below-average rainfall season.
- Cash crop production mainly tobacco and cotton are also expected at below average levels due to anticipated reduction in cropped areas, prospects of a poor rainfall season, and the challenging economic environment.
- The 2019/20 WFP Lean Season Programme plans to reach at least 2.7 million people at the peak of the lean season, January through March in prioritized districts. However, since detailed plans were not available at the time of FEWS NET's analysis, FEWS NET assumes humanitarian food assistance will continue at similar levels to October 2019. Plans for assistance from government were not available.

Most Likely Food Security Outcomes

Acute food insecurity outcomes are likely to remain somewhat stable in semi-arid areas likely to receive humanitarian food assistance. However, Crisis (IPC Phase 3) outcomes are expected to persist across much of the country as the situation continues to deteriorate from October through the peak of the lean season in March/April. Throughout the projection period, areas of greatest concern include Kariba, Binga, Gokwe North, Mbire, Mudzi, and Chipinge where there would likely be some households in Emergency (IPC Phase 4) during the peak of the lean season. However, given plans for humanitarian food assistance in these areas, among other drought affected areas, Stressed! (IPC Phase 2!) outcomes are likely through March.

In areas where Crisis (IPC Phase 3) outcomes are expected to persist, poor households have already been relying on earlier than normal purchases, though they will face high food prices restricting their ability to purchase sufficient food to meet their basic food needs. These households are expected to engage in a variety of coping strategies till the harvest, likely in April. These strategies include; limiting meal frequency and quantity, increased consumption of wild foods, extended sale of livestock, labor migration, and decreasing expenses on healthcare, veterinary care, and agriculture inputs.

Based on historical data, the national median prevalence of acute malnutrition is 3.3 percent, which is "Acceptable" (GAM by WHZ <5%) according to the WHO Classification. In 2016 when the nation experienced similar El Nino conditions and almost similar production, the GAM prevalence was 4.4 percent. The national prevalence of acute malnutrition is expected to increase beyond both the average and current 3.6 percent, especially between February and March. Some localized areas will likely reach the Alert level (GAM 5-9.9%); however, the national prevalence will likely remain less than 5 percent.

The green harvest in March/April (green mealies, pumpkins, fresh groundnuts etc.) is likely to be below average especially in typical marginal production areas. The main harvest, anticipated to start in April, will also likely be below average. However, it will help improve outcomes to Stressed (IPC Phase 2), mainly in high production areas. However, in some deficit producing areas, Crisis (IPC Phase 3) outcomes are expected to continue.

Events that Might Change the Outlook

Possible events over the next eight months that could change the most-likely scenario.

Area	Event	Impact on food security outcomes
National	Fiscal and monetary policies such as the printing of high amounts of local bond notes	This may negatively impact livelihoods and markets if this leads to an increase in the inflation rate, as this would further decrease households purchasing power, thereby increasing food insecurity prevalence and the population in Crisis (IPC Phase 2).
	Very high inflation or hyperinflation	This will vastly erode incomes, and lead to asset depletion or exhaustion of assets among other emergency coping strategies. This may also result in basic commodity shortages, increasing the number of food insecure populations across rural and urban areas, leading to Emergency (IPC Phase 4) outcomes in some areas.
	Average or above average 2019/20 cumulative rainfall	Will likely improve the availability of labor opportunities (November through March), prospects for the green harvest (January/February) and main harvest (April/May). This will also improve water availability and access for a variety of livelihood activities and livestock body conditions. This will most likely lead to an improvement of food security outcomes starting in April with most areas of the country facing Stressed (IPC Phase 2).

AREAS OF CONCERN

Mwenezi Chivi South Midlands Communal Livelihood Zone (MCSMC) – Focus on Mwenezi District

Current Situation

Cumulative rainfall for the 2018/19 season in Mwenezi District was 50 to 70 percent below the long-term average. As a result, 2019 maize crop production was estimated at 1,150 MT (Table 1), 78 percent below last year and 82 percent below the 5-year average. Total cereal production was about 5,300 MT, almost 70 percent below both last year and the 5-year average. Pearl millet was about 50 percent of average. Poor households in the district produced only 0 to 3 months' supply of own-produced cereals, with typical surplus wards between 6 to 7 months' supply. Legume production was 25 percent below average. Market grain supply and trader activity are significantly below normal; however, market demand is atypically high due to depleted own-produced household food stocks. Most farmers and traders are selling limited stocks within the district as opposed to the typical trade with distant markets especially for small grains, impacting incomes.

The October maize grain prices in Mwenezi District Center were ZWL \$2.86/kg, 25 percent above the previous month and 400 percent above the price in March when the new currency (ZWL) was introduced. Local brands of maize meal were generally available in retail shops and at GMB markets though supplies were also below normal. Small grains were also available on some markets as were

small amounts of South African maize meal brands. Other basic commodities such as rice, which are typically substitutes for maize and small grains are available, although priced beyond the reach of many households. Mobile money transfer prices are 40-50 percent above cash prices, further impacting poor household access to basic commodities as households have limited cash to purchase foods. A small proportion of better-off households are sourcing their basic commodities from South Africa for own consumption or resell in cash.

Figure 7. Area of Concern Map



Source: FEWS NET

Most water sources in the district have dried up earlier than normal, affecting household and communal vegetable gardening activities among other activities. Only a few households close to alternative water sources such as boreholes engaged in some vegetable production. Pasture conditions are very poor across much of the district. Some southern parts of the district are significantly overgrazed with cattle from neighboring Beitbridge District. Livestock supplementary feeds are in short supply and where available, very expensive. Livestock diseases are prevalent, including foot and mouth with the district in the “red zone”. Cattle dipping in communal areas is poor due to water and chemical shortages. Cattle are in poor condition and deteriorating. Cumulatively, nearly 540 drought-related cattle deaths have been reportedly recorded between October 2018 and September 2019. There were also reports of forced cattle slaughter to avoid cattle losses. Small stock is in fair to good condition.

Livestock are mainly sold in South African Rands. The cattle prices are generally average to below average considering the poor cattle condition and below normal demand. The market for small stock is more functional with mainly poor households selling goats and chickens.

WFP’s Lean Season Assistance Programme is targeting an estimated 54,000 beneficiaries from October through December with a food ration meeting roughly 60 percent of their kilocalorie needs. As a result of ongoing humanitarian food assistance, Stressed! (IPC Phase 2!) outcomes are being experienced in the district.

Assumptions

In addition to the national-level assumptions, the most likely scenario in this livelihood zone are based on the following assumptions:

- Maize grain prices are expected to increase throughout the outlook period based on the prevailing economic situation and atypically high market demand.
- Humanitarian assistance is likely to continue for the period October 2019 through May 2020 with an estimated 55,000 beneficiaries receiving a full basket of food or cash equivalent meeting an estimated 60 percent of a person’s kilocalorie needs.

Most Likely Food Security Outcomes

Humanitarian food assistance is likely to stabilize household food consumption with Stressed! (IPC Phase 2!) outcomes through the harvest. However, it is still likely there will be some households in Crisis (IPC Phase 3) and food consumption is likely to worsen in these households. These households have depleted own-produced stocks, limited livelihood opportunities and high cost of food and other basic commodities will result in consumption and livelihood-based coping including reduction in meal portions and number of meals.

Despite the anticipated below average harvest households are expected to consume green foods starting from February and the main harvest anticipated in April. However, poor household limited purchasing power will most likely keep households in Stressed (IPC Phase 2).

Events that Might Change the Outlook

Possible events over the next eight months that could change the most-likely scenario.

Area	Event	Impact on food security outcomes
MCSMC Livelihood Zone	Late start and below normal humanitarian assistance	Will worsen the food security outcomes and potentially lead to households experiencing Emergency (IPC Phase 4) outcomes in the most critical parts of the district

Figure 8. 2019 Cereal Production Mwenzi District in MT

Crop	2019	2018	5-year Average	% diff to 2018	% diff to 5-yr ave
Maize	1,153	5,256	6,467	-78%	-82%
Sorghum	675	6,345	4,608	-89%	-85%
Pearl millet	3,490	7,259	7322	-52%	-52%
Finger millet	5	82	46	-94%	-89%
Total	5,323	18,942	18,443	-72%	-71%

Source: Ministry of Lands, Agriculture, Water, Climate and Rural Resettlement

Cereal and High Cotton Producing Communal (CHCC) Livelihood Zone, Gokwe South District

Current Situation

Cumulative rainfall for the 2018/19 season was significantly below average with a late start across all the wards. The late and poor seasonal rains also affected cropped area, with both maize and cotton areas estimated at 25 percent below the district averages. According to the official 2nd round crop and livestock assessment report, 2019 maize production for Gokwe South District was about 26,400 MT, 30 percent lower than the 5-year average (37,250 MT). Though the official report estimated that Gokwe South District will have an average 7 to 9 months of cereal self-sufficiency for the 2019/20 consumption year. Although, indications from FEWS NET's field assessment in September found own-produced stocks were significantly lower, especially in deficit-producing wards. Poor production for other crops such as small grains, groundnuts, cow peas, sweet potatoes is also affecting availability for household own-consumption and sale. As for cotton, district production targets for 2018/19 was 45,000 MT, yet actual production was estimated at 14,000 MT with the bulk of this (more than 85 percent) coming from Cottco-contracted farmers.

Cotton sales were also below average and is typically an important source of income as sales normally cover poor households' maize purchasing needs. Cotton was selling at 1.95 ZWL/kg at the start of the selling season in June and most farmers delivered at that price. However, as other commodity prices increased, the cotton industry did not immediately respond by raising prices until July. Prices were raised to 3 ZWL/kg, when most farmers had sold all their crop, losing on potential income. As a result, some households are selling the very limited maize grain not because of surpluses, but to meet urgent family needs such as school fees, transport, and other basic needs.

Maize grain availability is atypically low and the GMB did not have its traditional mobile grain collection depots this season in several wards. There is also a very conspicuous absence of large traders who normally source grain from the district for long distance markets such as Masvingo, Bulawayo, the Matebeleland Provinces and Harare. This is mainly due to limited stocks as well as government restrictions on grain movement other than to the GMB. This is negatively impacting household incomes as very few households have sold or are selling to the GMB or local traders.

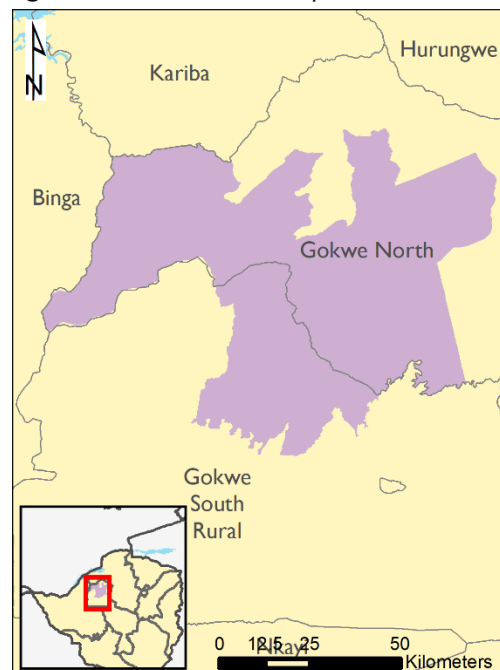
Instead of typical large maize grain outflows, this season is characterized by small intra-district flows of maize, mainly farmer to farmer sales. There is also a notable atypical flow of grain towards the north to parts of Gokwe North, Binga and Kariba Districts, a flow that started earlier in the season as traders were attracted to the USD humanitarian assistance cash disbursements before the use of foreign currencies was banned.

This season there is very little or no bartering of maize grain with basic commodities and other goods brought by traders from outside the district. Instead, most barter was localized. Some farmers have started withholding grain from the markets for speculative reasons.

Pastures across most areas in the district are poor and deteriorating in both quantity and quality. Most farmers have stocked crop stover reserving it for the worst part of the lean season, especially for November/December when energy demands for draught power increases. Very few farmers can afford livestock supplementary feeds for their livestock due to high costs on the markets. The situation is worsened by prevalent wildfires in some parts of the district. As a result, cattle condition is mainly fair to poor. Goats are mostly in good condition, relying on browsing.

Water availability and access are constrained, both for domestic, livestock, and other livelihood uses. Most seasonal streams/rivers have long dried up. Boreholes are the main water sources, yet, as water tables continue to recede, yield levels are dropping fast. There is high human and animal pressure at functional boreholes, with a high number of boreholes not functional, either due to technical faults or because they are dried up. In most areas, animals are moving long distances to water points and there are incidences of animals getting stuck and dying in muddy waters.

Figure 7. Area of Concern Map



Source: FEWS NET

Livestock markets are depressed due mainly to liquidity challenges and poor demand as a result of macro-economic challenges, as well as poor cattle condition. There are few cattle buyers on the market, leaving the only abattoir (MC Meats) in the district determining prices to a great extent at lower prices than what farmers prefer. Additionally, most cattle sales are distress sales. The cattle market is a cash market only – in local bond notes. Goats were selling between ZWL \$150-250 each in early September and the markets are mainly local and stable. Chickens went for between ZWL \$25-45. Most households have reportedly lost chickens to New Castle.

Starting in October through December, WFP plans to distribute food to nearly 100,000 beneficiaries with emergency food assistance. Current food security outcomes in Gokwe South District are Stressed! (IPC Phase 2!) as humanitarian food assistance is improving household food access and consumption.

Assumptions

In addition to the national-level assumptions, the most likely scenario in this livelihood zone are based on the following assumptions:

- Maize grain supplies on the markets will likely run out much earlier than normal this year. Maize grain prices are likely to increase further with prices through the peak in March 2020 estimated to be about 300 percent above the same time in March this year.
- From January through March 2020, WFP will likely increase targeted beneficiaries per month above those for October to December; ration sizes are expected to remain the same.

Most Likely Food Security Outcomes for the Livelihood Zone

Typical livelihood options and incomes (crop sales, livestock sales, casual labor, petty trading) will be below normal as will be dry season activities such as gardening, brick molding and construction. Other likely coping options include labor migration, gold panning and begging. Access to markets for basic commodities will be limited by high and increasing commodity prices. Most poor households and others will also experience great difficulties accessing agricultural inputs on the markets due to high and increasing prices. This will affect cropped area, casual labor and other livelihoods.

Many poor household's food consumption is expected to stabilize as humanitarian assistance is expected to continue in this area. As a result, Stressed! (IPC Phase 2!) outcomes are expected throughout the outlook period in the zone as many households are expected to receive humanitarian food assistance. However, it is expected there will still be some households in Crisis (IPC Phase 3). Households that are in Crisis (IPC Phase 3) will most likely not be able to afford their non-basic food expenditure as food prices are expected to be very high.

Households outcomes are expected to continue to be Stressed (IPC Phase 2) with the harvest from April as many households will continue to face difficulty meeting their non-food needs.

Events that Might Change the Outlook

Possible events over the next eight months that could change the most-likely scenario.

Area	Event	Impact on food security outcomes
Cereal and High Cotton Communal Livelihood Zone and other cotton production areas	Improved cotton prices for the 2019/20 production season	If the 2019/20 rainfall season turns out to be normal to above normal, improved cotton prices will result in higher incomes for poor households and hence increase access to basic food.

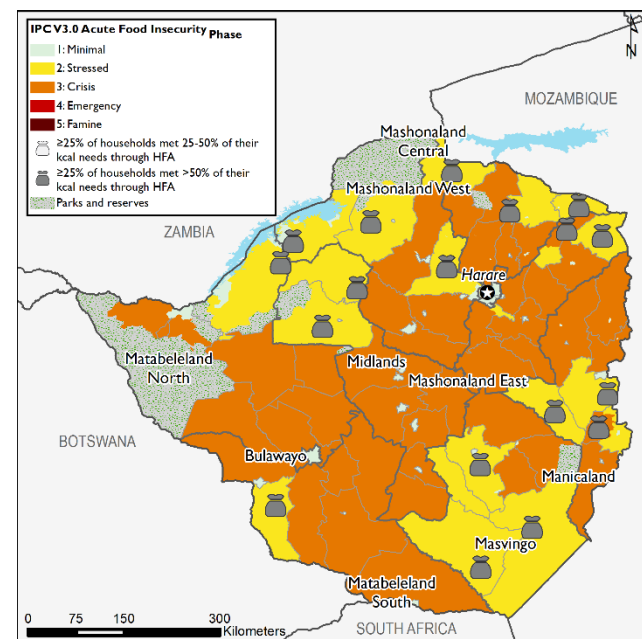
Annex I**Table I:** Timeline of key macroeconomic events impact on livelihoods and food security

Date	Key Event	Effects/Impacts/Notes	ZIMSTAT annual inflation
Early Oct 2018	Introduction of 2 percent tax on electronic and mobile money transfers (up from 5 cents a transaction) for transactions above RTGS \$10	Increased prices of goods and services	20.9 percent
	Reserve Bank of Zimbabwe (RBZ) requests banks to separate bank accounts into Nostro foreign currency and local RTGS accounts	Local currency RTGS value depreciated to 1USD: RTGS \$4 leading to an increase in prices of goods and services	
Late Oct 2018	Government lifts two-year import ban on selected food and non-food commodities	Increased availability of basic commodities, however overall effect was marginal due to below average incomes	
Jan 2019	150 percent fuel price increases	Private transporters increase transport fares by up to 100 percent as fuel shortages increase Increase of basic and other commodity prices with bread prices increasing by 70 percent, reaching their highest since 2009 Foreign currency shortages increase, and parallel market activities intensify	56.9 percent
Feb 2019	RBZ monetary policy statement disbands the USD1:1 bond note exchange rate. RBZ establishes the interbank market at US\$1: RTGS \$2.5	Parallel market exchange rates increase further and basic and non-basic commodity prices increase	59.4 percent
Apr 2019	Government increases cereal (maize and small grains) producer prices by 86 percent from USD/ZWL \$390/MT to ZWL \$760/MT	Despite, 38.5 percent GMB maize subsidy to commercial millers, maize meal prices increase immediately by around 30 percent	75.9 percent
Mid-Apr 2019	Wheat price increases	Bread prices increase by up to 75 percent	
Late May 2019	Government removes fuel subsidies to fuel companies	Fuel prices go up 50 percent	97.9 percent
June 2019	Cereal producer prices increase by 93 percent from ZWL \$726/MT to ZWL \$1,400		175.7 percent
	Government bans the use of foreign currencies and declares the ZWL as the sole legal currency	ZWL depreciates resulting in further food and non-food price increases	
	Government stops publishing annual inflation reports citing incompatibility of USD price indices to new ZWL price indices	Increases market speculation and uncertainty	Gov't Stops Publishing Year on Year Inflation Rate
July 2019	Cereal producer prices go up 50 percent from ZWL \$1,400/MT to ZWL \$2,100/MT Weekly petrol and diesel price increases begin*	*Weekly fuel price increases have been consistent till end of October (except for just two weeks in Oct)	
End Sept 2019	ZWL \$ has depreciated by over 500 percent against the USD since February when the interbank market was established ZWL \$ depreciated 30 percent against interbank market and about 60 percent on the parallel market since June		
Early Oct 2019	Cereal producer prices go up 90 percent from ZWL \$2,100/MT to ZWL \$4,000/MT		
Early Oct 2019	Govt lifts the three-year maize import ban		
Mid-Oct 2019		Bread prices increase 60 to 75 percent	
End Oct 2019	Govt announces imminent intent to introduce a new currency in November in \$2 coins and \$5 notes, operating alongside the current bond notes and coins at a 1:1 ratio.		

MOST LIKELY FOOD SECURITY OUTCOMES AND AREAS RECEIVING SIGNIFICANT LEVELS OF HUMANITARIAN ASSISTANCE*

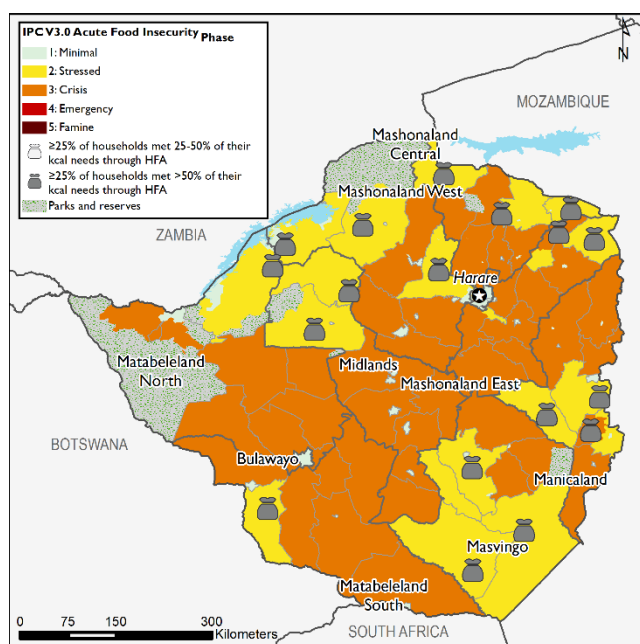
Each of these maps adheres to IPC v3.0 humanitarian assistance mapping protocols and flags where significant levels of humanitarian assistance are being/are expected to be provided. 🍲 indicates that at least 25 percent of households receive on average 25–50 percent of caloric needs from humanitarian food assistance (HFA). 🍲 indicates that at least 25 percent of households receive on average over 50 percent of caloric needs through HFA. This mapping protocol differs from the (!) protocol used in the maps at the top of the report. The use of (!) indicates areas that would likely be at least one phase worse in the absence of current or programmed humanitarian assistance.

Current, October 2019



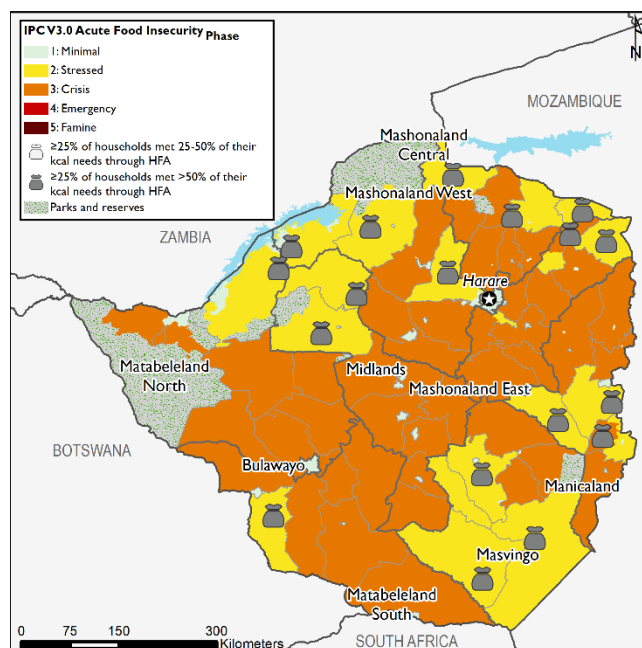
Source: FEWS NET

Projected food security outcomes, October 2019 to January 2020



Source: FEWS NET

Projected food security outcomes, February to May 2020



Source: FEWS NET

FEWS NET classification is IPC-compatible. IPC-compatible analysis follows key IPC protocols but does not necessarily reflect the consensus of national food security partners.

ABOUT SCENARIO DEVELOPMENT

To project food security outcomes, FEWS NET develops a set of assumptions about likely events, their effects, and the probable responses of various actors. FEWS NET analyzes these assumptions in the context of current conditions and local livelihoods to arrive at a most likely scenario for the coming eight months. [Learn more here.](#)