

SPECIAL REPORT

FAO/WFP CROP AND FOOD SUPPLY ASSESSMENT MISSION TO ZIMBABWE

19 June 2003

Mission Highlights

- Although national cereal production is considerably up on last year, a significant food gap remains, particularly affecting those who lost their crops mainly due to erratic weather in different parts of the country. Coping mechanisms are seriously stressed or largely exhausted after the severe shortages of last year.
- The 2002 Population Census shows a population figure of 11.635 million. This is considerably lower than 13.018 million used in last year's report, which was based on previous projections. Based on the latest census which also indicates the population growth rate to be 1.1 percent per annum, the mid-2003/04 (April-March) population used in calculating aggregate food requirement is 11.77 million.
- Cereal production for consumption in 2003/04 is estimated at 980 000 tonnes, which is 41 percent higher than last year's, but 51 percent below the 2000/01 harvest, which was itself significantly below average.
- Production of maize, the main staple, estimated at 803 000 tonnes, is 61 percent up on last year, but 46 percent lower than in 2000/01.
- The major causes of the much lower than normal production of cereals this year include erratic rainfall, limited availability of seed and fertilizer, particularly in view of two or three replantings needed in many areas, and the newly settled farmers not being able to utilize all the land due to lack of adequate capital and inputs, or collateral to procure them. Following the land reform programme, the large-scale commercial sector now produces only about one tenth of its output in the 1990s.
- Cereal import requirement for the marketing year 2003/04 is estimated at 1.287 million tonnes, of which maize accounts for 980 000 tonnes. Given the acute shortage of foreign exchange, the Mission estimated that GOZ cereal imports are unlikely to exceed 370 000 tonnes (of which 174 000 tonnes have already been contracted). In the continued absence of private sector imports, this would leave a deficit of 610 000 tonnes of maize to be met by emergency food aid. Against this requirement 120 000 tonnes are in the pipeline, leaving 490 000 tonnes to be covered by new contributions. In addition, imports of wheat and rice estimated at 298 000 tonnes and 9 000 tonnes respectively, will need to be covered on a commercial basis.
- The Government controlled price of maize meal was raised almost four-fold in late May. This will greatly limit access to available supplies for the most vulnerable people. The Mission estimates that 4.4 million people in rural areas and 1.1 million in urban areas will require food assistance in 2003/04.
- There is also a severe shortage of maize seed in Zimbabwe, which if not addressed will greatly limit plantings in the coming season. Appropriate varieties of maize and also small grain seeds need to be sourced immediately for delivery in September 2003.

1. OVERVIEW

Zimbabwe was hit by an erratic rainfall pattern during 2002/03 cereal growing season, following on the heels of a severe drought and the collapse of cereal production the previous year. It is against this backdrop that an FAO/WFP Crop and Food Supply Assessment Mission visited the country from 21 April to 10 May 2003 to estimate the 2002/03 production of the main cereals and pulse crops, forecast the 2003/04 winter crop



FOOD AND AGRICULTURE ORGANIZATION OF THE UNITED NATIONS, ROME



WORLD FOOD PROGRAMME, ROME

production, review the overall food situation and determine the food import requirement, including food assistance needs, for the next 12 months.

In Harare, the Mission held meetings with the Ministry of Lands, Agriculture and Rural Development (MLARR), UNDP Resident Coordinator and other UNDP officials, FAO sub-Regional Representative and other FAO officials, WFP Country Director a.i. and other WFP officials, World Bank, Embassy of Japan, FEWSNet, Zimbabwe Meteorological Department, Commercial Farmers Union (CFU), Zimbabwe Indigenous Commercial Farmers Union (ICFU), Farm Community Trust of Zimbabwe, Millers Association of Zimbabwe, SADC, Zimbabwe Vulnerability Assessment Committee (ZIMVAC), Zimbabwe AIDS Network, fertilizer and agricultural input supply companies, and international and national NGOs. The Mission also consulted remote sensing data on rainfall, vegetation indices and various interim assessment reports.

During field visits the Mission was accompanied by observers from EU, SADC, FEWSNet and UNDP/RRU. It was assisted by senior specialists from MLARR, two FAO staff members from the country and several staff members from WFP country and field offices. The Mission, split into three teams, was able to visit 24 districts across all eight provinces. Discussions were held with provincial and district level government officials, particularly from Agricultural Research and Extension Service, farmers, labourers, traders and WFP's implementing partners and other NGOs. Market surveys were conducted and livestock condition observed and investigated enroute and in the districts visited. Field assessments were made regarding household food security, vulnerability, coping mechanism and social welfare programmes. The crop production and vulnerability situation obtaining this year was compared with the 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 2002/03 agricultural season was characterized by alternating rainfall and dry spells. Farmers had to replant on many occasions as previous plantings were largely destroyed by spells of drought. In many places two or three plantings were undertaken, the last having been reasonably successful. In other areas, all the plantings were virtual write-offs. Rather heavy rainfall received in most parts of the country in late February-early March 2003 in the wake of Cyclone Japhet was generally helpful in improving grazing conditions and water availability for livestock.

The area planted to various grains, including maize, in 2002/03 main season is almost the same as last year. Overall, the area planted in the large-scale commercial sector declined significantly mainly due to land reform activities and that in the communal areas declined slightly mainly due to adverse weather conditions, particularly as plantings had to be carried out twice or thrice in many areas. However, the area planted in the small-scale commercial sector increased despite unfavourable weather conditions, as seed availability was relatively better for this category of farmers, almost offsetting the declines in other categories. On average, yields are significantly better than last year.

The Mission estimates the main cropping season cereal harvest of 887 061 tonnes in 2002/03 (namely, maize and small grains) for consumption in the 2003/04 marketing year. This is 66 percent higher than that of 2001/02, but still 44 percent lower than that of 2000/01. Maize output in 2002/03, at 802 664 tonnes, is 61 percent higher than last year but 46 percent lower than the year before.

Winter wheat is now being planted and is forecast to be down to 90 000 tonnes compared to last year's 160 000 tonnes. The reasons for the decline include reduction in both area planted and yield, given that fertilizer availability is seriously constrained. Winter maize is not expected to be of any significance. Altogether, this year's total cereal production, (i.e., maize, small grains, wheat and a small quantity of rice) is estimated at 980 000 tonnes, 41 percent higher than last year, but 51 percent lower than the year before.

Based on the estimated main season cereal output, projected wheat production and an opening stock of 115 000 tonnes of all cereals, the total cereal import requirement in 2003/04 (April/March) is estimated at 1.287 million tonnes, of which maize constitutes 980 000 tonnes.

In view of low export earnings from tobacco (mainly due to lower production) and cotton, and considering the competing claims on the extremely limited foreign exchange by the critically needed imports of fuel and electricity as well as the servicing of the external debt, the Government's ability to import maize in 2003/04 is apparently very limited. The substantial maize import last year may also have a constraining effect this year as sources of foreign exchange are as a consequence likely to be severely stressed this year. It is understood that the Government will make every effort to import as much maize as possible; thus, given that a quantity of some 174 000 tonnes of maize is to be received this year out of purchases made last year, a

Government import of 196 000 tonnes of maize in 2003/04 is assumed – i.e., a total of 370 000 tonnes. It is also assumed that the deficits of 298 000 tonnes of wheat and 9 000 tonnes of rice this year will be met by commercial imports. The remaining gap, all in terms of maize, is, therefore, 610 000 tonnes to be covered by emergency food aid. Against this requirement, 120 000 tonnes are already in the pipeline leaving 490 000 tonnes to be covered by additional contributions.

Livestock condition is generally good with good pastures and water availability in most areas of the country, particularly following rains brought by Cyclone Japhet in late February/early March 2003. But the number of export quality livestock has declined rapidly from 1.66 million in 2000 to an estimated 0.2 million now. The prices of livestock are also low this year, reducing livestock owners' coping ability in relation to accessing food grains. Other coping mechanisms have also been seriously stressed during the last year of extreme food shortages, and in many cases effective coping possibilities have been exhausted. It is also the case in certain areas that some people may find some money through different means (sale of livestock, petty trade, wages, gold mining/panning, remittances by relatives) but they cannot procure maize either because it is not available in the market or prices are exorbitant when some supplies are available. While the GMB price is Z\$ 634 per 50 kg bag of maize, the market price has been found to vary from Z\$ 3 000 to Z\$ 8 000 per 18 kg bag in different urban areas of the country. The GMB supplies are reported to be irregular and in certain areas no supplies have been available since December 2002 or even earlier. In late May, the GMB-controlled price of maize meal was raised by almost four times. This will seriously affect the poorest households. The Mission estimates that 4.4 million people in rural areas and an additional 1.1 million in urban areas will not meet their basic cereal requirements this year and will require some food assistance.

2. SOCIO-ECONOMIC SETTING¹

2.1 The general setting

Zimbabwe's economy has been contracting since 1998. Available data show that the country's real GDP (at 1990 prices) declined by over 30 percent between 1998 and 2003. A shrinkage of 12.3 percent occurred in 2002 alone compared to the previous year. A further decline of between 7 and 12 percent is anticipated in 2003. Business closures and downsizing and the consequent job losses continue unabated.

Average inflation rate rose to 200 percent in 2002 and it is likely to be up to 300 percent in 2003. It is a classic case of too much money chasing too few goods. Money supply has been rising sharply over the past several years while the real GDP declined. A money supply expansion of about 140 percent was registered in 2002, and the estimated further expansion in 2003 is 160 percent.

Even before the crop failure of 2002, 75 percent of the country's total population was classified as poor, and 42 percent very poor. The situation is much worse now. One estimate puts structural unemployment at 70 percent, and the situation is worsening. This very high and still increasing unemployment rate, combined with the high and increasing cost of living has caused the poverty situation to worsen to extreme levels. Successive crop failures, severely constraining people's coping mechanisms, have compounded people's deprivation. The poor include the rural population of farmers, petty traders and former farm workers as well as urban unemployed and informal sector operators. The situation of over 400 000 former farm workers and their families is desperate, as they have, in many cases, been displaced from their homes, have not benefited from the land reforms and have few employment opportunities.

The decline in export earnings and foreign investment and the suspension of balance of payments and project support by the international multilateral agencies have severely limited the access of Zimbabwe to foreign exchange. The country's foreign exchange reserve position is precarious. Reportedly, the foreign exchange shortage constrained even the printing of currency notes, as of May 2003 when this Mission was in the country. The general economic decline has also had profoundly adverse effects on the funding of agricultural research, extension and veterinary services and this limits the staff's ability to carry out their work effectively.

Usually, tobacco exports in the second quarter of a year boosts foreign exchange availability to Zimbabwe. But this year, the prospect in this regard is limited both due to the reduced tobacco production and pre-sale of substantial quantities of tobacco in 2002 by the Government in order to pay for critical imports, including food and fuel. Export earnings from gold and cotton are also reduced. It is clear that the foreign exchange

¹ The Section is based on a variety of sources including publications and unpublished reports of FAO, UNDP, Government of Zimbabwe, and the Country Profile of Zimbabwe for 2003 by the Economist Intelligence Unit.

crisis will persist during 2003, while demand will continue to be high in view of the need to import large quantities of food as well as of fuel and other essential capital and intermediate goods.

The country is currently in the grip of a severe and worsening fuel crisis. The Mission observed very long queues at petrol stations. The mission was informed that, not infrequently, after waiting in a queue for 10-12 hours, one may not get any fuel at all. Movement of people and goods are severely constrained as a result.

The prevailing currency exchange rate regime is highly anomalous. The officially fixed exchange rate is Z\$ 55 to US\$ 1. Then, there was, at the time of the Mission, a semi-official exchange rate that was allowed to be used by banks, hotels and others, which was Z\$ 800 to US\$ 1. But the parallel market rate was Z\$ 1 700-2 200 to US\$ 1. This anomaly has been exacerbating the hard currency shortages as much of the incoming foreign exchange finds its way into the parallel market.

Although the cereal production this year is significantly larger than last year's, a large food gap remains. In certain areas, many are without food even at the harvest time as their crop almost totally failed. A large number of people in many parts of the country will run out of food within the next 2-4 months. With the people's coping strategies severely stressed during the past year, food insecurity is becoming very serious indeed. The Grain Marketing Board (GMB), a Government agency, sells maize at Z\$ 960 per 50 kg bag, but the GMB supplies are widely reported to be irregular. Moreover, even if some people can, and certain groups of people are able to, mobilize some money through, for example, sale of livestock, petty trading, remittances from relatives working in the cities or abroad, and gold panning/mining, they are usually unable to access maize/mealie meal as either there are no supplies of these food items in the market, which is often the case particularly in rural areas, or prices are too high. Food prices vary widely from one part of the country to another. For example, the price of maize was observed in May 2003 to be as high as Z\$ 8 000 per 18 kg bag in Bulawayo and around Z\$ 3 000 in places such as Mutare, Masvingo and Beit Bridge, and around Z\$ 2 000 in Harare. But in most rural areas market prices are irrelevant as there are no maize/mealie meal supplies coming onto the market.

2.2 Agriculture in the national economy

Agriculture is the mainstay of the national economy. It generates food for the people, a large proportion of foreign exchange earnings (e.g. tobacco exports account for 20 to 30 percent of the country's total foreign exchange; another major agricultural export earner is cotton), and the bulk of the raw materials to the manufacturing sector. The majority of the country's population is engaged in agriculture that accounts for between 15 and 20 percent of the gross domestic product (GDP).

Zimbabwe's land is divided into five natural zones on the basis of soil type and climatic factors. Natural regions 1, 2 and 3 are suitable for intensive crop cultivation and livestock raising, while regions 4 and 5 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 1, 2 and 3, while Matabeleland (North and South) and Masvingo Provinces are under natural regions 4 and 5. The three Mashonaland Provinces constitute the bread-basket of the country.

Zimbabwe's farming sector can produce, and has in the past produced, exportable surpluses of maize and certain other food crops.

2.3 The Land Reform Programme

At the time of Independence in 1980, land distribution was as follows.

Table 1. Land ownership pattern in Zimbabwe at Independence in 1980.

Sector	Million hectares	% of total
Large-scale commercial	15.5	39.1
Small-scale commercial	1.4	3.5
Communal	16.4	41.4
National parks and urban	6.0	15.2
State land	0.3	0.8
Total	39.6	100.0

The large-scale commercial farms were owned by white farmers. A land reform programme was initiated following independence to increase the access of the indigenous people to land. The first phase covered the period 1980 to 1998, during which 3.5 million hectares of large-scale commercial farm land were acquired

and 71 000 indigenous families were resettled on those lands. The second phase was initiated in 1998, but only an area of 0.17 million hectares was acquired and 4 697 families were resettled. 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.

Data collected by the Mission (Table 2) indicate that the beneficiaries number 205 823 as A.1 model farmers (small subsistence farmers) and 28 665 as A.2 model farmers (commercial medium and large farmers), (JB to provide) as of May 2003. A total of 10.7 million hectares has been acquired and redistributed, which accounts for about a quarter of the country’s total land endowment of 39.6 million ha. Aside from the official process, there have also been informal farm invasions, which have occurred regardless of the legal status of those farms under the land reform programme.

These activities and processes have severely disrupted farming activities as many resettled farmers lack access to capital and other inputs or need time to settle down, contributing to this year’s low cereal production. They have also contributed to the catastrophic decline in the national dairy and export beef herds.

Table 2. Beneficiaries of the Land Reform Programme by Province, May 2003

Province	No. of Gazetted farms	Area in ha	Number of beneficiaries	
			A1 model	A2 model
Manicaland	644	588 028	20 023	1 405
Mashonaland Central	754	833 287	26 541	4 011
Mashonaland East	1 182	1 133 473	26 252	8 133
Mashonaland West	1 381	2 190 290	37 801	12 198
Masvingo	404	1 646 920	41 001	988
Matabeleland North	565	1 738 446	15 819	195
Matabeleland South	403	1 366 824	16 458	224
Midlands	621	1 164 492	21 928	1 511
Total	5 954	10 661 760	205 823	28 665

2.3 The effect of HIV/AIDS

The AIDS pandemic was officially reported to be causing the deaths of 2 500 people per week in Zimbabwe in 2000. This is having a major effect on the farming community, with many heads of households succumbing to this disease, leaving orphans behind to be looked after by grandparents and other relatives. Due to general poverty, many of these orphans do not have the means to pay school fees and so do not go to school. The Mission saw many examples of families caring for up to six orphans in addition to their own children. Food aid was targeted at providing a maximum of 50 kg of maize per family per month, sufficient for five people. However, the number of members in many families is more than five, even up to ten so that the food aid supplied to such families has been inadequate.

Due to the current shortage of food throughout the country and especially in the cities, the onset of AIDS is quicker, as people have less resistance to the disease. Labour availability is greatly reduced and hundreds of thousands of orphans face life alone and with dwindling means of support. Social safety nets are breaking down as impoverished people do not have the means to feed and clothe more orphans.

3. FOOD PRODUCTION IN 2002/03

Following a disastrous harvest last year, this year is significantly better in terms of the main season cereal production, estimated at 887 061 tonnes, 66 percent up on last year. Maize production is estimated at 802 664 tonnes, an increase of 61 percent compared to last year. This is attributed to a better rainfall pattern, though many other problems beset the farming industry in 2002/03.

3.1 Rainfall

While the amount of rain over the whole country from October 2002 to March 2003 was, on average, over 75 percent of normal, rainfall was erratic especially in Midlands, Matabeleland South and Matabeleland North. October was wetter than normal and this encouraged farmers to plant early, except in Mashonaland Central, where only 60 percent of the normal October rains fell. November was generally dry and this led to the loss of many early planted crops. In December, apart from south of Masvingo and parts of Matabeleland, rainfall was well below normal also. Farmers who had not planted were beginning to despair of rains at this point.

From January to March the spatial distribution of rainfall was erratic, but sufficient to allow late planting. Cyclone Japhet brought heavy rains in most parts of the country during late February and early March, 2003. In the south of the country, these late planted crops produced some harvest, but in the Mashonalands, many late planted fields failed to produce a useful crop.

3.2 Inputs

Severe shortages at planting time of both maize seed and fertilizer were reported from all districts by communal farmers and A1 farmers, particularly as two or three plantings had to be carried out due to the vagaries of rainfall. The larger A2 farmers had better access to these inputs and thus their production was not so constrained.

A total of 48 000 tonnes of maize seed was reported to be available at the beginning of the season. Of this, the government assumed control of about 18 000 tonnes for distribution throughout the country through Grain Marketing Board depots well above the previous years. Logistical problems caused delays in distribution with the result that seed was often not available when it was needed. The amount of seed available to private sector distributors was severely constrained, especially after October. Only the larger A2 farmers could collect seed from GMB depots, while communal and A1 farmers had to wait for supplies to be distributed. Many farmers reported that they could only obtain 10 kgs of seed, sufficient for only 0.4 ha, well short of their needs. The mission was informed in many parts of the country that some seed which was received late was washed of its dressing and eaten, further reducing seed supplies. Some quantities could also have been unofficially exported due to the high price differential in neighbouring countries. Farmers planted any type of maize seed that they could obtain, thus limiting potential yields.

The fertilizer industry reported that 420 000 tonnes of fertilizer had been distributed throughout the country, compared to 418 000 tonnes in 2000 and 433 000 tonnes in 2001. Price controls held the price of fertilizer at an estimated 34 percent below the cost of production and well below prices in neighbouring countries. Price controls in 2002 had resulted in significant losses by private sector distributors. Given the reported shortages all over the country despite the normal production figure, it may be assumed that, as for seeds, some fertilizer was unofficially exported, though no figures are available to prove this.

Shortages of Ammonium Nitrate were particularly acute so that few crops received the recommended top-dressing. The fertilizer industry is still constrained by foreign exchange shortages to buy potash and spare parts, by shortages of fuel and power and by price controls such that supplies of fertilizer for the upcoming wheat season are very low indeed.

The brewing industry and a large agricultural company provided sufficient inputs to some larger A2 farmers to grow sorghum for brewing and some fine crops of sorghum were seen especially in Mashonaland West. Soya bean production was also assisted in this way and good crops were obtained. As maize is a price controlled crop, such farmers did not grow it, thereby greatly limiting production.

3.3 Pests and diseases

While the effect of erratic rainfall was very severe, pests and disease problems occurred only in few places. Most provinces reported outbreaks of Army Worm affecting 50 –200 ha, but these were efficiently controlled before they could spread and cause more widespread damage. The late rains provided ideal conditions for cob rots on some maize crops in Mashonaland Central but the areas concerned were small.

3.4 Area planted

The area planted to maize is estimated at 1 387 526 hectares, very similar to the previous year's area of 1 317 800 hectares. Area planted was reduced in many areas, such as Mashonaland West due to lack of seed and fertilizer, lack of draught power, lack of credit to purchase inputs and failure of the GMB to provide sufficient quantities of inputs on time. In Mashonaland East, area planted increased considerably as resettled farmers who had access to sufficient seed, planted more land to maize. As noted above, private sector suppliers did not have the stocks to provide sufficient seed or fertilizer. A further factor affecting area planted was the low uptake of A2 farms, which left vast areas of the most highly productive land in the country fallow for the year. In a normal year this land would have been planted to maize and tobacco and other crops.

Tobacco production is estimated to be 41 percent less than the previous year, with much of the drop due to a sharp reduction in area. Some large scale commercial farmers who were allowed to continue farming

produced an estimated 60 million kgs, with 20 million kgs being produced by resettled farmers and communal farmers.

The area planted to sorghum and other drought tolerant crops such as pearl millet and finger millet was constrained by lack of seed throughout the country. Some supplies were imported by NGOs. Some large farms in Mashonaland West were planted to sorghum to be used for industrial purposes, with high yields being obtained due to good management and sufficient inputs of herbicide and fertilizer. This combination resulted in high yielding crops of sorghum, often alongside failed maize crops.

3.5 Yields

The estimated overall maize yield of 0.58 tonnes/ha is low because of many factors. Chief of these were the drought periods during the growing season, but yield was also reduced by lack of fertilizer and quality seed and the lack of the right variety for the particular area, poor land preparation and high infestations of weeds. Farmers, especially newly resettled farmers, also lack training in proper crop husbandry practices. Weed infestation was a major constraint on high yields, especially on A2 farms, most of which did not retain the skilled farm workers who used to work on these farms. The Government tractor hire service was overwhelmed by the demand for land preparation services and many farmers planted without carrying out normal land preparation. Private agricultural contracting services have not developed to supplement the government's mechanisation service. Ox-draught is scarce in the communal areas and on A1 farms. The effect of HIV/AIDs also militated against timely weeding and other production practices.

Sorghum yield on large commercial farms that had access to quality inputs was expected to be as high as 2 tonnes/ha due to good management and the suitability of sorghum for areas having erratic rainfall.

3.6 Estimated main season production

Table 3 presents estimates of area planted and production during the 2002/03 main season, compared to the same season in 2001/02. Total cereal production is estimated at 887 061 tonnes, 66 percent up on last year's very poor harvest. Maize production (82 percent of total cereals) is up by 61 percent on last year.

Table 3. Zimbabwe : Area and production of cereals, pulses and cash crops in 2002/03 main cropping season compared to 2001/02 planting season

CROP/SECTOR	2001/02 MAIN CROPPING		2002/03 MAIN CROPPING		2002/03 Vs.2001/02	
	Area (ha)	Production (tonnes)	Area (ha)	Production (tonnes)	% Change in Area	% Change in Production
MAIZE						
COMMERCIAL SECTOR	61 800	185 400	127 265	225 316 ^{1/}	105.9	21.5
SMALLHOLDER SECTOR ^{2/}	1 256 000	313 140	1 260 261	577 348	0.3	84.4
TOTAL MAIZE	1 317 800	498 540	1 387 526	802 664	5.3	61.0
SORGHUM						
COMMERCIAL SECTOR	5 000	15 000	2 546	5 757	-49.1	-61.6
SMALLHOLDER SECTOR	77 700	8 818	72 000	33 803	-7.3	283.3
TOTAL SORGHUM	82 700	23 818	74 546	39 560	-9.9	66.1
PEARL MILLET ^{3/}						
SMALLHOLDER SECTOR	65 250	3 570	51 492	20 077	-21.1	462.4
FINGER MILLET						
SMALLHOLDER SECTOR	67 000	9 940	57 541	24 760	-14.1	149.1
ALL CEREAL GRAINS	1 532 750	535 868	1 571 105	887 061	2.5	65.5
SOYBEANS						
COMMERCIAL SECTOR	37 000	74 000		37 760		-49.0
SMALLHOLDER SECTOR	21 229	9 139		11 000		20.4
TOTAL SOYBEANS	58 229	83 139		48 760		-41.4
GROUNDNUTS (Unshelled)						
COMMERCIAL SECTOR	1 000	1 800		7 180		298.9
SMALLHOLDER SECTOR	270 163	58 857		134 000		127.7
TOTAL GROUNDNUTS	271 163	60 657		141 180		132.8
SUNFLOWER						
COMMERCIAL SECTOR	1 800	3 600		850		-76.4
SMALLHOLDER SECTOR	24 378	4 067		3 975		-2.3
TOTAL SUNFLOWER	26 178	7 667		4 825		-37.1
PAPRIKA						
COMMERCIAL SECTOR	3 000	9 000		11 270		25.2
SMALLHOLDER SECTOR	13 179	3 984		2 485		-37.6
TOTAL PAPRIKA	16 179	12 984		13 755		5.9
TOBACCO						
COMMERCIAL SECTOR	56 700	162 100		83 450		-48.5
SMALLHOLDER SECTOR	23 819	16 306		21 314		30.7
TOTAL TOBACCO	80 519	178 406		104 764		-41.3
COTTON						
COMMERCIAL SECTOR	5 800	12 000		15 606		30.1
SMALLHOLDER SECTOR	400 121	188 417		212 378		12.7
TOTAL COTTON	405 921	200 417		227 984		13.8
GRAND TOTAL	2 390 939					

^{1/} Commercial sector this year includes large scale commercial farmers and small scale commercial farmers.

^{2/} Smallholder sector includes communal farmers, A1 and A2 and old resettled farmers. The production data for all non-cereal crops was provided by FEWSNET, using MLARR and the Crop Forecasting Committee figures. The Mission had no part in their preparation and they are included here for reference/comparison purposes.

^{3/} The smallholder production figures for pearl millet and finger millet include a small area produced by commercial farmers.

3.7 Winter season crops

Wheat is the main winter season crop and 95 percent of it used to be grown on large-scale commercial farms having access to irrigation. The government owned ARDA farms produced about 5 percent. Some small areas were traditionally grown in communal areas. This year there is sufficient seed to grow over 50 000 hectares, but there is a critical shortage of fertilizer. The irrigated area has been reduced considerably. The Mission estimates that only 30 000 hectares of wheat will be planted this season. Potential yields have been reduced due to lack of fertilizer. Wheat prices are lower than those for barley. Some government loans were reported to have been provided to resettled A2 farmers to upgrade irrigation infrastructure. The threat of power cuts by the electricity utility may also prevent irrigation areas powered by electric pumps from working at full capacity and shortages of diesel fuel may prevent irrigation at the desired level. The level of dams in Mashonaland Central is much lower than in the previous year and this may reduce area planted there.

Barley prices are considerably higher than wheat prices, (Z\$180 000 compared to Z\$150 000) and are not subject to price controls. It is expected that the maximum area of barley will be grown. Constraints on fertilizer which will affect the wheat crop are not expected to affect the barley crop to the same extent as the large companies supplying inputs to barley producers have ample access to inputs.

Table 4. Zimbabwe: Wheat and barley area, yield and production for 1991-2002 and forecast for 2003

	Wheat			Barley		
	Area (ha)	Yield (t/ha)	Prod. (tonnes)	Yield (t/ha)	Area (ha)	Prod. (tonnes)
1991	44 000	5.9	259 320	5 605	5.6	31 600
1992	11 180	5.1	56 920	1 136	4.3	4 900
1993	48 000	5.8	277 109	6 400	5.2	33 102
1994	52 647	5.5	287 904	5 650	5.8	33 000
1995	13 860	5.1	70 000	2 355	5.3	12 500
1996	47 843	5.5	263 134	5 300	5.7	30 000
1997	55 200	4.5	250 000	10 700	4.3	45 500
1998	50 000	6.0	300 000	9 879	5.8	57 234
1999	57 574	5.6	324 430	3 079	5.4	16 671
2000	46 375	5.4	250 000	5 128	6.3	32 200
2001	45 455	7.1	325 000	4 545	5.5	25 000
2002	37 500	4.3	160 000	3 000	5.5	16 500
2003	30 000	3.0	90 000	6 000	5.0	30 000

Source: Zimbabwe Cereals Producers Association; 2003 forecast by the Mission.

3.8 Livestock

The commercial beef herd on large scale commercial farms numbered 1.66 million head in 2000. It was reported by the Department of Veterinary Services to have declined to 510 000 head in 2002. It has declined still further since then up to an estimate of 200 000 now. This is attributed to the land reform programme, as farmers slaughtered their cattle when their farms were allocated for resettlement. The commercial breeding herd declined from 720 000 to 250 000 between 2001 and 2002. Cattle numbers on communal areas remained relatively constant at 3.9 million head in 2002, but off-take from this herd is estimated at only 3 percent per annum, much lower than its potential.

The decline in the numbers of quality beef cattle has serious and long term implications for beef exports for which there is an annual demand of over 25 000 tonnes.

Cattle in communal areas benefited from rains in February and March associated with Cyclone Japhet and there is adequate grazing now throughout the country. The drought conditions in Matabeleland South in December 2002 resulted in the deaths of thousands of cattle in the districts of Gwanda and Beitbridge, further impoverishing this area. Cattle prices were reported to be very low in Matabeleland North.

The dairy herd continued to decline with prime dairy cows being slaughtered for meat. As a result, milk supplies have declined sharply.

An outbreak of foot and mouth disease, which began in the south of the country has not been controlled and threatens not only the national herd, but also cattle in neighbouring countries. The presence of this disease has also meant that important export markets for Zimbabwe beef are now closed.

Prices of acaricides and other veterinary inputs increased substantially during the year, making it difficult for poorer livestock owners to dip cattle at appropriate times.

4. PRODUCTION SITUATION BY PROVINCE

Table 5. Zimbabwe: Maize Production Estimates by Province in 2002/03 Cropping Season (tonnes)

Province	Smallholder Production 2002/03	Smallholder production 2001/02	Percentage change in production 2002/03 or 2001/02
Manicaland	76 214	38 354	98.7
Mashonaland Central	109 198	79 671	37.1
Mashonaland East	143 703	44 369	223.9
Mashonaland West	70 542	76 964	-8.3
Masvingo	81 658	21 279	283.7
Matabeleland North	18 416	3 189	5 674.9
Matabeleland South	7 617	234	32 451.3
Midlands	70 000	49 080	42.6
National Smallholder Total	577 348	313 140 ^{3/}	84.4
Large Scale Commercial Total ^{1/}	80 000^{1/}	185 400	-56.9
National Small Scale Commercial Total ^{2/}	145 316	N/A	^{1/}
Overall National Total	802 664	498 540	61.0

^{1/} Large scale commercial production in 2001/02 only included members of the Commercial Farmers Union.

^{2/} Small-scale commercial farmers, that are members of the Zimbabwe Farmers Union and the Indigenous Commercial Farmers Union.

^{3/} This includes 16 000 tonnes of the small-scale commercial farmers.

4.1 Mashonaland West

This province felt the full effects of the land reform programme in 2002. Large areas of the land which had been allocated to A 2 farmers, but was not taken up, were not planted at all. This resulted in a decrease of 40 percent in the area planted to maize in this normally high-producing area.

On the land that was actually planted the lack of labour for weeding and general crop care was evident, with large areas of maize overcome by weeds, with obviously high yield losses. Herbicide costs quintupled early in the season, putting them beyond the reach of most farmers. A 1 farms fared somewhat better in the east of the province, with those farmers who managed to get enough seed and fertilizer in time recording yields of up to 3 tonnes/ha. However, in Makonde District the communal lands and A1 farms succumbed to drought, exacerbated by severe shortages of inputs such as seed and fertilizer. A2 farmers, who had the resources to buy seed and fertilizer at the right time and to hire machinery for land preparation achieved yields of up to 3 tonnes/ha.

Total maize production in Mashonaland West is estimated at 70 542 tonnes, compared to 76 964 tonnes in the previous season and 188 045 tonnes in 2000/2001.

A reported 850 hectares of sorghum were grown for beer brewing, with very high yields being obtained. This was due to the provision by a commercial company of all the necessary inputs, including herbicides, fertilizers and technical advice. As a result, yields of sorghum were over 4 tonnes/ha on these farms. The quality of the sorghum crops on all farms this season, as compared to maize crops, underlined the superiority of this crop in marginal rainfall areas. A total of 290 hectares of pearl millet and 1858 hectares of finger millet were grown, with good yields being obtained. Unfortunately, seed supplies were not adequate to meet the demand at planting time.

Wheat production in Mashonaland West is expected to decline sharply due to scarcity of fertilizer and operational irrigation equipment. Barley production is expected to rise due to better prices being offered by

industrial users and the availability of all necessary inputs provided on loan by these companies. Barley is also not subject to price controls, which enhances marketing opportunities.

4.2 Mashonaland Central Province

The early drought destroyed many maize crops in the communal areas of Bindura District. Crops were better in A 1 and communal farms in parts of Guruve, but in the Zambezi Valley areas, crops were either destroyed by drought on the higher lands or by flooding along the river banks. This impoverished many farmers in Guruve north and Mazarabanda. The eastern half of Rushinga District had a disastrous harvest, with early sown crops destroyed by drought. Replanting was hampered by lack of seed and fertilizer. Maize production is estimated at 109 198 tonnes, compared to 79 671 tonnes in 2002 (a very poor year) and 220 211 tonnes in 2001.

Lack of seed and fertilizer were widely cited as the cause of lower planted areas. Where crops failed due to the early dry spell during October and November, sufficient seed and fertilizer for replanting was only obtained with the greatest difficulty and in many cases farmers failed to obtain seed in time. Lower quality seed had to be planted due to scarcity of hybrid seed, with predictable declines in yields per hectare being recorded.

A total of 2 581 hectares of sorghum, 1 580 hectares of pearl millet and 1 135 hectares of finger millet were planted with production estimated at 2 216 tonnes of sorghum, 790 tonnes of pearl millet and 911 tonnes of finger millet. As in other provinces, shortage of seed prevented further plantings.

4.3 Mashonaland East

The rains which accompanied Cyclone Japhet in the last week of February and the first week of March enabled some late sown crops to complete their growth cycle. Early sown crops planted in early October ran into a prolonged dry period beginning in the second week of October and lasting until late November.

Almost all the A1 farmers took up the farms allocated to them while in some districts the uptake of A2 farms was as low as 15 percent. As a result of this, large areas of good arable land remained uncultivated. On those A2 farms which were taken up, lack of seed, fertilizer and draught power, together with lack of skilled labour (few of the original farm labourers were kept on to work on the newly allocated A2 farms) led to serious reductions in yield.

Total smallholder maize production in Mashonaland East is estimated at 143 703 tonnes, an increase of 224 percent compared to the previous year. Sorghum area planted by smallholders is estimated at 6 234 ha, producing an estimated 1 995 tonnes, with a further 260 tonnes being produced by the commercial sector.

The districts of Seke and Chikomba were badly hit by the dry period in November and December. Many farmers lost their crops and could not obtain the seed and fertilizer to plant again. Most farmers have produced only 200-250 kgs of maize, sufficient for up to July 2003.

4.4 Manicaland

The rains were erratic this year, though the overall amount was about average. After an early start in October, which favoured early planting of maize and other cereals, drought set in quickly and affected early-planted crops. Crops that were planted from early December to late December did well and are about to be harvested. Overall, the agricultural year was much better than in 2001/02, but below normal.

Smallholder maize production in Manicaland in 2002/03 season is estimated at 76 214 tonnes, an increase of 98.7 percent above last year. Sorghum production was also considerable, with 14 678 hectares being grown by smallholders. Seed of maize and other crops was not sufficient to meet farmer demand and was often late in delivery. However, given the nature of the season, this helped the later plantings. Fertilizer supplies were also erratic, especially of Ammonium Nitrate for top dressing.

Only a small area of wheat is grown in Manicaland and six tonnes of seed are already delivered. However, fertilizer supplies were still lacking in the second week of May.

4.5 Masvingo Province

This province is mainly in agro-ecological region V and most of the land is suitable only for livestock grazing and extensive farming. Erratic rainfall in many parts of the province led to failure of early planted crops, but the late rains in February and March 2003, helped many later-sown crops to reach maturity. Average annual rainfall in Masvingo is around 700 mm and about 48 percent of this fell during late February and early March. The heavy late rains caused sprouting of maize at harvest in some areas. Hence, production of maize on smallholder plots is estimated at 81 658 tonnes, a substantial increase on last season's output of 21 279 tonnes. Total commercial production is estimated at 22 002 tonnes.

Sorghum, pearl millet and finger millet are important crops with an estimated total of 8 795, 4 515 and 8 906 tonnes being produced, respectively. Shortages of seed of maize and small grains reduced potential planted areas.

The foot and mouth disease outbreak continues to cause concern in Masvingo. Due to grain shortages, intensive livestock production has almost come to a halt, with poultry production reduced by 80 percent compared to past levels.

4.6 Matabeleland North Province

Matabeleland North is a predominantly dry-land area most of which is in agro-ecological zone V (extensive farming), with cattle rearing being the most important economic activity. The rainfall pattern differed here from other parts of the country in that the effects of Cyclone Japhet did not extend to some parts of this province. This resulted in the failure of some late planted crops.

Maize production is estimated at 18 416 tonnes, a considerable increase on the previous year's poor harvest of 3 189 tonnes, but much less than the 63 486 tonnes achieved in the 2000/2001 season.

Sorghum plantings were estimated at 12 124 ha, producing a harvest of 6 062 tonnes, while 13 304 hectares of pearl millet produced an estimated 3 991 tonnes. Finger millet is not so widely grown, with an estimated 510 hectares being planted, producing 102 tonnes.

The condition of cattle is currently good, as late rains improved the pasture and browse available. Prices of cattle have collapsed and livestock owners reported that even when cattle were sold for cash, there was no grain available in the market. As in other provinces, livestock owners were hit by high prices of veterinary drugs and acaricides.

4.7 Matabeleland South Province

Maize production in Matabeleland South is estimated at 7 617 tonnes, a big increase on the 234 tonnes produced in 2002 and similar to the 10 034 tonnes produced in 2001. The late rains which fell in February and March assisted late planted crops to complete their growth cycle.

Sorghum, pearl millet and finger millet are grown, with estimated areas of 8 218, 4 574 and 33 hectares respectively, which produced an estimated total small grain production of 2 214 tonnes. This province is much more suited to these crops than to maize, but seed shortages and peoples' dietary preferences limit the production of these crops.

Livestock raising is the main activity in this province and many thousands of cattle died from drought in late 2002. Rains in February and March have improved grazing, but it will take years for the stock losses to be recouped. Costs of acaricides and other veterinary requisites are rising beyond the ability of stock owners to pay and this has led to a decline in dipping, increasing vulnerability of cattle to tick borne diseases.

4.8 Midlands Province

Weather conditions in Midlands Province were particularly erratic, with many farmers having to plant up to three times as successive plantings failed due to drought. The seed used for later plantings were of generally low quality and were scarce. Fertilizer was also scarce and this led to lower than optimal yields.

Smallholder maize production is estimated at 70 000 tonnes, a 42.6 percent increase on the previous year's harvest. The area under sorghum was reported as 6 449 ha, producing an estimated harvest of 3 225 tonnes.

Pearl millet and finger millet are important crops, with production estimated at 8 372 tonnes and 7 142 tonnes, respectively.

5. CEREAL SUPPLY/DEMAND BALANCE, 2003/04 (APRIL/MARCH)

Following on the heels of a collapse of cereal production last year, the cereal output this year is also very low relative to the cereal requirements, although it is up by about 41 percent compared to last year. This year's low agricultural production is largely caused by erratic rainfall with prolonged spells of drought and shortages of seeds and fertilizers, particularly as in most areas two or three replantings were necessary as a result of successive crop failures due to drought.

Zimbabwe's cereal supply/demand balance sheet for the 2003/04 marketing year (April/March) is shown in Table 6 and is based on the cereal production estimates shown in Tables 3 and 4 and the following assumptions.

- Population Census 2002 puts the population of Zimbabwe at 11.635 million as of 18 August 2002 growing at 1.1 percent per annum. Mid-2003/04 marketing year population works out to be 11.77 million.
- The stock of maize held by the Government at the beginning of the current marketing year is 50 000 tonnes. Privately-held stocks (by farmers and traders) cannot be much given the extreme shortages of maize during the past year and are assumed at about 2 000 tonnes (plus additional 2 000 tonnes of sorghum and millet). Food aid stocks in the hands of WFP and NGOs amount to 36 000 tonnes. In the case of wheat, the total opening stocks amounted to 25 000 tonnes.
- Per caput cereal consumption of 163 kg per annum is, as previously assumed, distributed across cereals as follows: maize 120 kg; wheat 29 kg; millet and sorghum 13 kg; and rice 1 kg. At 163 kg of cereals per caput/annum, about 85 percent of the calorie needs of a person would be met, on average. The remainder is expected to come from other foods such as beans, groundnuts, root crops, meat, poultry, fish, vegetables and wild foods. Although there has been a reduction in population in the 2002 Population Census, the per caput cereal consumption has not been increased because population for the intercensal years is not yet available and there is not enough information to compute it. Moreover, average cereal consumption is based on a long-term average, including surplus and deficit years. In 2003/04 there is a large gap between domestic availability and consumption requirements; even considering 163 kg per capita per annum, actual consumption may be slightly below the average level.
- Use of cereals for animal feed is likely to be limited, given the large and widespread shortages of grains. Moreover, livestock numbers have significantly declined over the past year. Thus, the quantity of maize to be used as feed is estimated at 150 000 tonnes, some 100 000 tonnes less than last year.
- Hybrid maize seeds purchased from seed suppliers and supplied by Grain Marketing Board (GMB) are used almost universally in Zimbabwe. Hence, normally not much maize is set aside for seed. But, in view of likely limited availability of hybrid seeds in the coming year, farmers can be expected to set aside certain quantities of maize for seed. With a projected planted area next season of 1.4 million hectares and assuming that in certain areas replantings would be necessary, a total of 30 000 tonnes is assumed to be set aside for seed. Losses are assumed at 10 percent of production, or 80 000 tonnes of maize. For other grains, 10 percent losses and small quantities for seed and other uses are assumed.
- A strategic closing stock of 120 000 tonnes of maize, sufficient for the national need for a month, is assumed. In the case of wheat, the closing stock is assumed to be 60 000 tonnes, about two months' supply.
- Government of Zimbabwe imported substantial quantities of foodgrains during 2002/03, reportedly 920 000 tonnes, with about 174 000 tonnes for delivery during the current marketing year. These large imports have put a severe stress on the already dwindling foreign exchange resources of the

country. Forward sale of tobacco was resorted to, limiting the foreign exchange earning prospects in the current year. Given the acute shortage of foreign exchange, the Mission have estimated that GOZ maize imports are unlikely to exceed 370 000 tonnes (of which 174 000 tonnes have already been contracted). It is assumed that the deficits of 298 000 tonnes of wheat and 9 000 tonnes of rice will be covered by commercial imports. In February 2003, the Government issued a number of measures to ease the restriction on food imports by the private sector, including increasing the quantity of food individuals can import without a permit and duty-free importation of maize and wheat, by licensed traders. This should increase the participation of the private sector in the import of grains.

Total expected commercial imports of cereals in 2003/04 amount to 677 000 tonnes against an import requirement of 1.287 million tonnes (55 percent being maize). The remaining deficit of 610 000 tonnes needs to be covered by emergency food aid. Taking into account food aid-in-pipeline of 120 000 tonnes, the uncovered deficit is estimated at 490 000 tonnes of maize (38 percent of the total cereal requirement).

Given that large numbers of households in different parts of the country either already do not have or will soon run out of food supplies, and that their coping mechanisms have been severely stressed, or exhausted, this year's food deficit needs to be addressed adequately, particularly targeting the most vulnerable people, including households severely impacted by HIV/AIDS.

Table 6. Zimbabwe: Cereal Supply/Demand Balance, April 2003/March 2004 ('000 tonnes) ^{1/}

	Maize	Millet & Sorghum	Wheat	Rice	All Cereals
Domestic Availability	891	86	115	3	1 095
Opening stocks	88 ^{2/}	2	25	-	115
Production	803	84	90	3	980
Utilization	1 871	86	413	12	2 382
Food use	1 412	153	341	12	1 918
Feed use	150	-	-	-	150
Seed use and losses	110	12	12	-	134
Cross commodity substitution	79	(79)	-	-	-
Closing stocks	120	-	60	-	180
Total Import Requirements	980	-	298	9	1287
of which:					
Commercial imports	370	-	298	9	677
<i>already contracted</i>	174	-	-	-	174
<i>still to be contracted</i>	196	-	298	9	503
Emergency Food aid	610	-	-	-	610
<i>in the pipeline ^{3/}</i>	120	-	-	-	120
<i>still to be pledged</i>	490	-	-	-	490

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

- Negligible or none.

2/ Of which about 36 000 tonnes are maize food aid stocks of WFP and other NGOs

3/ Pipeline maize food aid stocks of WFP and NGOs.

6. VULNERABILITY ANALYSIS AND ESTIMATES OF EMERGENCY CEREAL REQUIREMENTS

6.1 Recent developments affecting vulnerability levels

Food security in Zimbabwe has continued to deteriorate in the last year as a result of a further dramatic slowdown in the economy, the effects of three consecutive years of adverse climatic conditions, and the disruption in the patterns of agricultural production due to the land reform programme. These factors have affected a large part of the population, in particular the vulnerable rural populations, the urban poor, and former commercial farm workers and their families.

The decline of the economy in Zimbabwe has led to drastic increases in prices of basic staples. Rising prices combined with an absolute deficit in stocks of maize at the national level has put enormous pressure on households' ability to cope and acquire sufficient food. Chronic vulnerability to food insecurity exists among many Zimbabweans, particularly where the physical constraints of marginal land combined with erratic rainfall make it difficult to make ends meet even in the best of

years. The effects of the HIV/AIDS pandemic, and chronic poverty, have further contributed to the overall deterioration of food security.

Efforts were made by the Government of Zimbabwe (GoZ) and the international community to facilitate a recovery in maize and other cereal production this year, including the distribution of seed and fertilizers to farmers throughout the country. In spite of these efforts, the national cereal production for the 2002/03 agricultural season was less than 40 percent of the five year average.

6.2 Government policies and actions regarding food insecurity

Since early 2002, the GoZ has taken some measures to mitigate the impact of the food shortages. The Inter-Ministerial Committee on Drought and Social Protection established in 2001 has been meeting regularly to review the situation and make presentations to Cabinet to support requests for funding imports of maize and other basic foodstuffs. On 26 April 2002, the President of Zimbabwe declared a State of Disaster in all communal lands, resettlement and urban areas, which allowed extraordinary measures to be taken to assist populations affected. Donors and international relief agencies were invited to jointly plan emergency assistance programs. In January 2003, the GoZ declared Matebeleland South a disaster area due to the continuing drought and crop failure.

The FAO/WFP Crop and Food Supply Assessment Mission of May 2002 had estimated a maize import requirement of 1.7 million tonnes for the April 2002 to March 2003 marketing year, to meet consumption requirements and to maintain a minimum of 150 000 tonnes of maize reserve. The GoZ embarked on a maize import program for 2002/03, for a total of ZW\$ 95 billion to fund maize imports through the Grain Marketing Board (GMB). In spite of an extreme shortage of foreign exchange, the GoZ reports that it was able to import about 920 000 tonnes of maize in the 12-month period from April 2002 to March 2003 for distribution at subsidized prices through the GMB. About 280 000 tonnes were received as food aid for distribution by WFP and its implementing partners.

The GoZ also operates a Public Works Programme (PWP) across most of the country, where people are employed and paid cash, with the intention that this money be used to purchase food. The greatest concentrations of participants in PWP were found in Mashonaland East and West, Matebeleland North and Midlands provinces. However, in most areas there were complaints about late payments and with the widespread unavailability of grain, the cash was of limited value as a means of improving food security. The GoZ is also supporting a Child Supplementary Feeding Scheme, for children under five children, to prevent an increase of malnutrition in some of the food deficit areas.

In February 2003, the GoZ launched a National Economic Revival Programme (NERP) to address the severe deterioration of the economy. NERP includes several measures to promote agriculture production, including land tenure issues, inputs support, producer pricing, contract farming, the establishment of a Land Bank and of an Agricultural Marketing Authority. NERP also contains a number of measures to ease the restriction on food imports and distribution.

The GOZ has raised its retail price of maize meal during the third week of May from Z\$ 454 per 20 kg to Z\$ 1 665 per 20 kg (i.e. by almost four times), which will greatly limit the ability to purchase grain for the most vulnerable. Most households reported that they purchase maize from both the GMB, when available, and on the parallel market when no other alternative exists. While this price increase will lead to some reduction in the parallel market price for maize, it is expected that many of the poorest households will not be able to afford the new GMB price. Hence, limited access to staple food combined with anticipated availability constraints are likely to result in substantial needs for food aid for the 2003/04 marketing year.

During its field visits, the Mission visited GMB depots, selling points, and a considerable number of households to obtain first hand impressions of the efficacy of the GoZ programme to alleviate food shortages. The Mission found that the distribution of maize at the Government-controlled price

through GMB had been erratic in all provinces throughout the year, and especially in the 4 months prior to the 2003 harvest. During the same period the distribution of food aid by WFP and its implementing partners to rural affected communities had been very regular, and in many cases, represented the main source of food for households.

6.3 Rural livelihood patterns and vulnerability

Over 67 percent of Zimbabwe's nearly 12 million people live in rural areas². Prior to 2000, 51 percent of the national population lived in the communal areas, 11 percent on commercial farms, 4.1 percent in resettlement areas and 1.6 on small-scale commercial land. Recent developments in land redistribution have shifted the number of people in these sectors, especially within the rural population. Approximately 74 percent of the rural population now resides in communal areas, 19 percent on commercial farms and A1 and A2 Resettled Areas, six percent in previously resettled areas and two percent in small-scale commercial farming areas.

In a normal year, crop production contributes 40-75 percent of rural households' annual cereal (or income to purchase cereal) requirement. The dramatic drop in crop production last year cut this contribution considerably. Mashonaland West appears to have maintained near normal production rates, with arid Matebeleland North and South producing the least. Many households in rural communities have exhausted their low-impact coping strategies and now rely on unusual and more high-impact coping mechanisms such as gold panning, the slaughter or sale of breeding cattle; and sending children to live with relatives. The mission also found a reported increase in prostitution, theft, and migration as a means to cope with economic hardships. Most households in the central, southern and western districts of the country have limited scope to expand their income-earning options. After three consecutive years of crop failure, desperate households from central districts such as Kwekwe (Midlands Province) and southern districts such as Gwanda (Matebeleland South Province) are reported to have bought the rights to tend and subsequently harvest plots of immature maize in northern districts such as Hurungwe in Mashonaland West Province, where crops performed better. Only households with cash reserves could afford this option.

Rural households throughout the country have been severely affected by consecutive poor harvests, chronic poverty, and HIV/AIDS, exacerbated by the declining economy and rising food and fuel prices. Over the last year, the poorer socio-economic groups within these populations have had to buy a substantial amount of their food on the parallel market. Many, if not all, of their saleable assets have been liquidated. There is an increasing reliance on limited gifts and remittances from friends and family, as well as food aid.

6.4 Vulnerability and coping strategies

There is general consensus among relevant agencies and data sources in Zimbabwe that the most acutely food insecure populations in rural areas are located in the communal lands of the south, west and extreme north of the country and among ex-farm workers in former commercial farming areas. Vulnerable areas include all of Matebeleland South, Matebeleland North and many areas of Midlands, Masvingo and Manicaland Provinces. The Mission found a higher level of vulnerability than expected in the Mashonaland provinces. Proportionately, more than half of the population of Matebeleland North and South will not be able to meet their basic cereal needs.

Livelihood patterns vary between provinces and may affect households' resilience to shocks. While households practicing agriculture are generally among the very vulnerable, livestock-based livelihoods, such as in the Matebeleland provinces, will become increasingly vulnerable as more and more households have sold, traded, or slaughtered their livestock to cope with this extended crisis. These areas have already experienced more than normal level of cattle deaths from drought, and will probably suffer an increase in livestock diseases due to the late rains and lack of veterinary inputs. It is therefore suggested that livestock-based areas be closely monitored in the coming months.

² Note: population figures have been recently adjusted, from over 13 million to just fewer than 12 million.

The mission found that households engaged a variety of coping strategies to meet food needs. They skipped meals on a regular basis, sold household assets and cut down on healthcare and education expenses. Unemployed males took up gold panning, and women sold wild fruits and handicrafts. Consumption strategies, such as skipping meals, have affected health status, compromised immune systems and led to increased vulnerability to chronic illness and death. Medium-term strategies, such as the withdrawal of children from school are associated with life-long reduced earning opportunities.

Signs of vulnerability and declining abilities to cope suggest an urgent need for food assistance to alleviate the strain on household livelihoods. Insufficient aid will force many of the poorest and most vulnerable households to sell any remaining livestock and assets, leaving them vulnerable to high-impact, and sometimes irreversible, survival strategies such as migration, prostitution, and theft. All of those affected are at a high risk of not being able to recuperate their assets, health, and opportunities, further undermining their ability to cope should another shock occur in the near future. Timely assistance will provide temporary relief from shocks and strains, and allow many to maintain and rebuild their coping capacities.

6.5 Provincial and sectoral livelihood patterns

Household livelihood patterns and food security strategies vary not only between provinces, but also among sectors. The majority of rural households are highly vulnerable to disturbances in availability and access to food. These are issues again this year, as a result of general shortage of food. *Communal and resettlement farmers* generally have income from cash crops and alternative sources of income to meet the gap between what they produce and their total food needs. The amounts of food that these alternative sources of income can buy depend on price. In Zimbabwe today, even though price controls for basic foodstuffs are in effect, only a part of the needs of communal and resettled farmers have been met due to insufficient GMB supply. The controlled GMB price for maize has been Z\$ 634 per 50 kg bag for the general public and Z\$ 825 per 50 kg for industry and commercial users, affecting stock feed. Prices on the parallel market have increased up to 20 times higher in the last year and could rise even further in the months ahead.

Former commercial farm workers, most of whom have no access to land, have become one of the most vulnerable groups. The greatest proportion of farm workers have historically been in the fertile Mashonaland provinces where many of the former large-scale commercial farms are located. Following the land redistribution programme during the past few years, many of these workers have been dismissed, some have returned to their communal areas or migrated to urban areas. Others have been employed on their former farms or on new farms by new A2 settlers, with reported earnings of as little as Z\$ 2500 per month (equivalent to about 143 kgs of maize at the GMB price, or 8.3 kgs on the parallel market). Retrenchment and the associated costs of returning home or migrating elsewhere are severe shocks to livelihoods, and the decreased accessibility and availability of cereal staples have severely eroded the already limited coping abilities of these some 300 000 former farm workers, or 1.8 million people including family members. Many face significant hardship in meeting household food needs, as new sources of income become increasingly scarce. Food assistance to former commercial farm workers, as well as food insecure resettled farmers, is very limited and in need of expansion. There is an urgent need to further assess the situation among former commercial farm workers, as well as resettled communities. It is recommended that an assessment of this population be undertaken urgently, and that comprehensive monitoring of the situation be conducted throughout the next marketing year.

Orphans are increasing in numbers throughout the country and many are considered very vulnerable. A growing percentage of orphans are heading households of younger siblings, barely able to meet their food requirements, and unable to afford school fees.

6.6 Urban and peri-urban populations

Food security within the urban and peri-urban areas continues to be an issue of major concern, due to the nation's rapidly declining economy. The urban unemployed and the urban poor, who are dependent on the market to access food, are often most affected by rising prices.

Urban Vulnerability Assessments carried out in Harare in 2001 and Bulawayo in 2002 showed significant patterns of food insecurity in urban areas.³ At the time of the assessment, households in Harare making less than ZW\$ 4 000 per month were found to have inadequate income to procure sufficient food. The study estimated that approximately 15 percent of the total population of Harare, or up to 300 000 people fell into this food insecure category and that this could grow to up to 700 000 people (35 percent of the population) by June 2003. A similar study was conducted in Zimbabwe's second city Bulawayo. Results from that study are similar, and the percentage of potentially food insecure people will be even higher than that for Harare because of less diversification of income and more dependence on the surrounding rural economy.

Lacking a current urban assessment, the mission observed that the situation in urban and peri-urban areas has deteriorated due mainly to hyperinflation and unemployment. Last year's assessments showed that the poor of Harare spend at least 40 percent of their incomes on food, while those in Bulawayo spend at least 50-60 percent of their incomes on food, particularly maize. Continued market shortages of basic commodities continue to lead to increased prices on the parallel market; this in turn affects households' purchasing power. Urban poverty is increasing as unemployment and inflation (estimated at 268 percent in April 2003) continue to rise. Finally, low wages from formal sector work, declining informal sector income-generating activities, higher rates of mortality among family members - particularly among the working age members - and long periods of illness among families have further eroded livelihoods and increased food insecurity.

The HIV/AIDS pandemic, combined with chronic illnesses such as tuberculosis and malaria, is negatively impacting directly or indirectly on urban, and rural, wage-earners, and it is expected that more and more households will have a chronically ill family member, and an associated decrease in family income. High adult mortality rates also demand that a significant percentage of family income is diverted to funeral costs.

6.7 Impact of HIV/AIDS on food security

Zimbabwe is currently facing what is termed a triple crisis (United Nations Children's Fund, UNICEF). Firstly, an HIV/AIDS epidemic with an estimated HIV infection rate of 33.7 percent amongst the age group of 15-49 years in 2001. Secondly, an orphan epidemic with an estimated total of 782 000 children aged 1-14 having lost their parents due to AIDS out of a total number of 1 018 000 orphans. And lastly, a food shortage crisis that worsens the plight of those living with, and affected by HIV/AIDS. The results are severe: deepening economic hardship, widespread destitution and increased vulnerability of children to food insecurity.

Recent findings indicate that households affected by HIV/AIDS are significantly more vulnerable to food security shocks than are other households.⁴ The analysis found that these households have marked reductions in agricultural production and opportunities for income generating activities. Households with chronically ill adults, particularly if head of households, were found to be disproportionately food insecure. The presence of chronically ill adults has a significantly greater impact on poorer households than on better-off households. This strongly suggests that already vulnerable households become even more vulnerable when living with the effects of HIV/AIDS.

³ WFP 2002. Bulawayo Urban Vulnerability Assessment. FEWSNET/CCZ 2001. Urban Vulnerability Assessments, Harare

⁴ Towards identifying impacts of HIV/AIDS on acute food insecurity in Southern Africa and implications for responses in 2003-04: Findings from Malawi, Zambia and Zimbabwe, SADC-VAC, May, 2003

6.8 Nutrition and special child protection issues

According to a recent analysis conducted by UNICEF Regional office in Nairobi, nutritional status of children under five has been maintained over recent years. However, the national picture conceals some of the underlying differences that are seen at a district level. Additionally, the high proportion of severe acute malnutrition in relation to moderate malnutrition could be related to the high prevalence of HIV/AIDS in the population. UNICEF also points out that the current causes of malnutrition are multi-faceted and complex and that malnutrition may be found in areas of adequate food security while adult malnutrition may occur in the absence of child malnutrition. Preliminary results from a country-wide nutrition survey sponsored by WFP, UNICEF, the World Health Organization, the GoZ, and NGOs is expected to be released shortly and should provide a more complete understanding of the nutrition situation.

The international community has been vigorously planning and developing strategies to address the humanitarian and recovery needs in Zimbabwe, including other critical non-food needs, raising awareness of HIV/AIDS and other health issues, water and sanitation, and child protection issues.

6.9 Magnitude and extent of food insecurity

Population most affected and cereal needs

The Mission estimates that about 4.4 million people in rural areas and an additional 1.1 million people in urban areas will not be able to access enough food to meet their basic cereal requirements this year; these 5.5 million people will require food assistance (see Table 7). Former commercial farm workers are included in both the rural and urban estimates. Based on an assumption of GOZ and commercial cereals imports of 677 000 tonnes (of which 174 000 tonnes is reported to be already contracted), the mission estimates the total food aid requirements for the 2003/04 marketing year at 610 000 tonnes of cereals. In addition to cereals, other food items such as oil and legumes should be provided to ensure a minimal nutritionally adequate diet. Further, the particular vulnerability of children, elderly, and the immune-compromised should be considered and appropriate nutritious foods provided. It is recommended that analysis of household data be employed to further clarify temporal and sub-district food needs.

For the communal and resettled rural population, the assessment of food aid (cereal) requirements and the number of people requiring assistance were based on the following assumptions:

- All cereals produced this year were considered to be used for household consumption and no cereals sold to GMB;
- Incomes from cash crops produced this year were assumed to be used for cereal purchase;
- Households with livestock were assumed to sell most of their livestock to help bridge their gap in cereals;
- The uncovered consumption deficit after deducting own production and the amount of cereals bought from cash crops, livestock sales and other incomes was considered to represent the food aid requirement. This estimate was then used to derive the number of people requiring assistance at the district level and this was aggregated to the provincial and national level;
- That an additional 500 000 tonnes of cereals will be imported. Should this not become available, cereal will be in extremely short supply, parallel prices will increase accordingly and the number of people unable to access cereal and therefore in need of assistance will increase.

Table 7. Zimbabwe: Estimates of affected population and cereal needs for 2003/04

	Total Population	Total Population in Need of Food Assistance	Cereal Food Aid Needs (Tonnes) April 2003-March 2004
Manicaland	1 329 490	757 809	76 000
Mashonaland	949 514	455 767	46 000
Mashonaland East	1 023 945	491 494	49 000
Mashonaland West	928 969	427 326	43 000
Masvingo	1 229 924	701 057	70 000
Matebeleland North	630 937	429 037	43 000
Matebeleland South	617 662	382 950	38 000
Midlands	1 141 390	719 076	72 000
Sub-Total Rural Population	7 851 832	4 364 515	437 000
Urban Population	3 918 957	1 058 118	173 000
Total Population	11 770 789	5 422 634	610 000

Not all the affected people will need a full year of support and therefore the Mission recommends, for rural populations, a phased approach divided into four time periods from April 2003 through March 2004. The estimates for these time periods are preliminary and will be refined in the months ahead on the basis of further assessments. For urban populations it is estimated that the monthly food aid needs would remain constant throughout the year. The number of rural and urban people who will need assistance for each of the recommended phases and the tonnages of cereal food aid needs are shown in Table 8.

1. During the first time period (April through June) food assistance will need to be provided to those currently in need due to carry-over effects from last year, late start of the harvest and/or minimal to no harvest this year. Close to two million people including urban households will need food assistance during this period.
2. During the second time period (July through September) food assistance will be needed for people whose current stocks are only expected to last to July or August. Food assistance for these people would provide both a necessary caloric input and reduces the need to search for alternative sources of income at the expense of neglecting to prepare their own farms for next year's agricultural season.
 - Twenty-eight percent of the rural population should be targeted beginning in July 2003 for a period of nine months
3. The third period (October through December) and the fourth time period (January through March 2004) are the most critical ones, as maize is expected to be in limited supply and/or sold at a price which will be vastly unaffordable for at least the poorest 50 percent of households
 - Forty-three percent of the rural population will require assistance for six months or more, starting in October 2004.
4. At the peak period, starting in January 2004, 56 percent of the rural population will need food-aid for at least three months.

5. Urban and peri-urban households in need will require a full year of support. These include vulnerable groups who have been:
 - Retrenched from a commercial farm
 - HIV/AIDS affected and/or chronically ill, with no employed adults
 - Child-headed households

Table 8: Recommended Phases for Food Assistance and Amounts for 2003-2004

Phased Needs Periods	Populations in Need Rural and Urban (number)	Cereal Needs (Tonnes)
April-June 2003	1 843 731	75 000
July-September 2003	3 284 021	134 000
October-December 2003	4 418 795	180 000
January-March 2004	5 422 634	221 000
Total April 2003-March 2004	5 422 634	610 000

In addition to the 5.4 million people described above, there are also a substantial number of people in Zimbabwe who will need other forms of assistance other than direct food aid. These people now have the resources to buy food when it is available on the market, but they are rapidly using up their income and savings buying high-priced food, and will eventually need food aid if major new supplies of food do not enter the market soon and moderate prices. This population's food crisis can best be resolved with food imports for the market, not food aid. If their needs are not soon served, the food crisis will become much larger and more difficult to resolve.

6.10 WFP assistance and ongoing emergency operation

WFP is currently operating an Emergency Operation (EMOP 10200/Southern Africa Crisis Response) in Zimbabwe that covered a total of 4.7 million beneficiaries at the height of the food crisis. The nine-month EMOP 10200, 1 July 2002 –31 March 2003, extended for three months to June 2003, was preceded by EMOP 10140 with a beneficiary target of 650 000 and was designed to provide a total of about 453 000 tonnes of foodstuffs (320 609 tonnes of maize, 60 859 tonnes of pulses, 20 256 tonnes of oil, and 51 231 tonnes of corn/soya blend). Distribution has been undertaken through implementing partners already operating in the country in close consultation with national and local authorities.

As of mid-May 2003, about US\$ 203 million (88 percent of the total value of the Zimbabwe EMOP) equivalent to 404 218 tonnes of food commodities had been pledged by donors and WFP, working through its implementing partners, had distributed some 346 000 tonnes of all commodities in 49 districts to a maximum number of beneficiaries of 4.7 million.

As of 1st April 2003 a total of 98 104 tonnes of cereals and 9 435 tonnes of other commodities were still in stocks or expected to arrive. Of these quantities 44 470 tonnes of cereals and 4 790 tonnes of other commodities were distributed in April to affected populations, leaving a balance of 53 934 tonnes of cereals and 4 645 tonnes of other commodities available to meet part of the food aid needs of affected rural populations in 2003/04.

This report is prepared on the responsibility of the FAO and WFP Secretariats with information from official and unofficial sources. Since conditions may change rapidly, please contact the undersigned for further information if required.

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