

FOSENET
NGO Food Security Network
Community Assessment of the
Food Situation in Zimbabwe
July 2003

For the executive summary please go to page 13

Background

The National NGO Food Security Network (FOSENET) involves 24 organisations that collectively cover ALL districts of Zimbabwe, and all types of communities.

FOSENET members subscribe that food distribution in Zimbabwe must be based on a platform of ethical principles that derive from international humanitarian law, viz:

- The right to life with dignity and the duty not to withhold or frustrate the provision of life saving assistance;
- The obligation of states and other parties to agree to the provision of humanitarian and impartial assistance when the civilian population lacks essential supplies;
- Relief not to bring unintended advantage to one or more parties nor to further any partisan position;
- The management and distribution of food and other relief with based purely on criteria of need and not on partisan grounds, and without adverse distinction of any kind;
- Respect for community values of solidarity, dignity and peace and of community culture.

FOSENET Monitoring

As one of its functions FOSENET is monitoring food needs, availability and access. FOSENET monitoring is implemented by the institutions in the monitoring working group (none of which are directly involved in relief work) through NGOs based within districts and community based monitors. Monthly reports from all areas of the country are compiled to provide a monthly situation assessment of food security and access to enhance an ethical, effective and community focussed response to the food situation. Queries and feedback on these reports should be directed to FOSENET monitoring at fsmt2@mweb.co.zw or (263-4-) 708835.

FOSENET ensures and improves on data quality and validity through training, cross reporting from the same district, verification from field visits and through peer review.

Comment and feedback on this report is thus welcomed – please send to fsmt2@mweb.co.zw.

This **ninth round** covers NGO and community based monitoring on nationally for the period **July 2003**. This round of monitoring includes information related to food security-poverty links, coping strategies and production outputs.

Coverage of the data

The information is presented in this report by district. It is collected from sentinel wards within districts. It is presented by district to ensure consistency in two or more site reports on any indicator for a district (cross validation). Data is presented for the period **July 2003** drawn from **142 monitoring reports from 50 districts** from all provinces of Zimbabwe, with an average of **2.8 reports per district**.

Change in the food situation

The improvement of food availability from local harvests has begun to plateau in July, forewarning future shortages in late 2003. Initial indicators suggest that food shortages may cover half of districts in the country. Many districts reported that food needs would become severe by October 2003.

In July 2003 26% of the districts reported an improvement in the food situation, significantly less than the 40% reported in May 2003. Gains from local harvests are disappearing, with 52% of districts reporting a worsening situation in July. As the improvements in 2003 have been largely due to improved maize harvests, these reversals will have wide impact in rural areas. Improved commercial supplies and maize grain coming in from rural areas for sale in parallel markets is reported to have improved urban supplies. Again falloff of harvest supplies will reduce these improvements. The worsening situation in over half of the districts was traced to inadequate harvests in those districts to secure adequate stored reserves, an absence of GMB deliveries and falling relief supplies.

'Since relief food has stopped coming people are starving'

Chikomba

Districts reporting no improvement or worsening situations are clustered in Matebeleland North, Matebeleland South, and Manicaland. These are provinces with chronic food insecurity, where food scarcities have been reported since 2002 (see Table 1).

Table 1: Districts with sites with worsening food situations, July 2003:

Province	District
Manicaland	Makoni, Mutare rural, Mutare urban, Buhera, Chimanimani,
Mashonaland East	Chikomba, UMP, Goromonzi
Mashonaland Central	Guruve
Mashonaland West	Chegutu urban
Midlands	Mberengwa, Zvishavane
Masvingo	Mwenezi
Matebeleland North	Hwange rural, Lupane, Binga, Nkayi
Matebeleland South	Gwanda, Matobo, Insiza
Bulawayo	Bulawayo

Given the poverty spiral that is linked with food insecurity it is likely that these areas would need more sustained poverty reducing and production support interventions.

Inadequate or absent GMB supplies continue to be noted . Only three districts (6%) reported improvements in GMB deliveries.

'There is a change GMB in the past month is supplying Border Gezi youths tuckshops'
Mutare urban

Food needs

The pattern of reported vulnerability remains the same as the elderly , orphans, ill people, people with disabilities and the unemployed continue to be most affected by food shortages.

Food insecurity is caused by a mix of poor harvests, unaffordable food prices and additional barriers to access in farmworkers, rural civil servants, teachers, children, elderly, disabled people and opposition supporters.

Students are struggling to make ends meet. They are surviving on one meal a day usually sadza and vegetables they are having porridge in the morning and one meal in the evening. The majority prepare their meals in rooms.

Harare Central

An increasing number of people are reported to be moving between districts to secure food. Almost half of the districts (40%) reported people moving out of areas where there is political discrimination in food access, or where farmworkers have lost their jobs. People are also moving into areas of improved food supply or to look for employment. Districts most affected by such movements are shown in Table 2 below.

'Rural people come to town to sell food at exorbitant prices'
Bulawayo

Table 2: Districts reporting food related migration in July 2003

Province	District	Reason
Manicaland	Buhera, Mutare rural, Chimanimani, Mutare urban	People going to growth points and towns for employment. Former farm workers and others coming into urban areas for food. Opposition members leaving because of politicization of food.
Mashonaland East	Chikomba, Marondera urban, Murehwa , Seke	People moving from urban to rural areas in search of food. Farm workers losing jobs moving into towns for employment or to other rural areas for gold panning.
Mashonaland West	Chegutu urban, Makonde, Norton	Women and youth movement for gold panning. Urban to rural movement to access food from good harvests.
Midlands	Zvishavane	People returning from gold panning
Masvingo	Bikita, Chivi,	Urban to rural movement to buy food. Rural

	Masvingo urban, Mwenezi	outflows to neighbouring districts of opposition members due to political bias in food access.
Matebeleland North	Hwange rural	People going to urban areas to look for employment
Matebeleland South	Gwanda	Outflows from Bulawayo for food and gold panning.
Bulawayo	Bulawayo urban	Inflows of people from rural areas to sell food at better prices in town. Outflows to rural areas to look for food. Some urban inflows to stay with relatives who can afford the high food prices or for employment.

In a situation of high inflation, there is a strong market incentive in terms of price and speed of payment for rural farmers to sell their produce in parallel markets, rather than to the GMB.

'People are selling their harvests directly to other consumers because the GMB is not paying much and its cheques take long to come.'

Harare

Migration is in both directions between rural and urban areas and from districts with poor harvests to districts with better harvests. Urban movement outward is to access rural food supplies from harvests. Inward movement to towns is to search for employment. Rural farmers are reported to be moving into towns to sell their harvests in urban parallel markets. They get significantly better prices in these markets than from the GMB and also report that GMB payments take some time before they are made. Given current rates of inflation of over 300%, farmers prefer to sell for ready cash to procure supplies before prices increase further.

'People have nothing to sell to the GMB'

Mutare rural

'Some people sold their harvests to National Foods and Chibuku breweries because of competitive prices offered by these companies. While others sold to the GMB because they were bound to do so. They got inputs from the GMB and hence they were bonded'

Bindura

Large urban areas reported greater consumption of traditional foods or foods not normally consumed, reflecting the reliance on direct rural food sources. (see Table 3).

Table 3 : Districts reporting foods not normally consumed, July 2003

Food Consumed	Districts reporting food consumed
Boiled sorghum	Bulawayo
Wheat meal	Harare
Cassava	Harare
Mashamba	Mwenezi

Although movement has become a critical survival strategy, it is also an increasingly costly and time consuming one, with 86% of districts reporting transport difficulties in July compared to 42% in May 2003. Increasing transport costs and fuel shortages mean that households are spending an increasing share of their scarce income and time moving to secure food. Reporting of transport problems in July has doubled compared to 42% in May, and problems relate to fuel shortages, high transport costs and unavailability of public transport. Fuel shortages were noted in many areas to have been the cause for non delivery of relief or GMB supplies.

Food availability and access

After some improvement of household food stocks in March to May, stocks are now beginning to decline again. While nearly a quarter of households had more than one months food supply in May, this had fallen to 14% by July. Over half (52%) of households were reported to have no food in stock.

Food from Production

People have already begun to try to source seed and fertilizer for the next harvest, but report problems of increased prices and low availability. Prices have increased in two months by over 100% and formal market prices have risen to price levels in parallel markets.

FIGURE 1: Seed availability July 2003

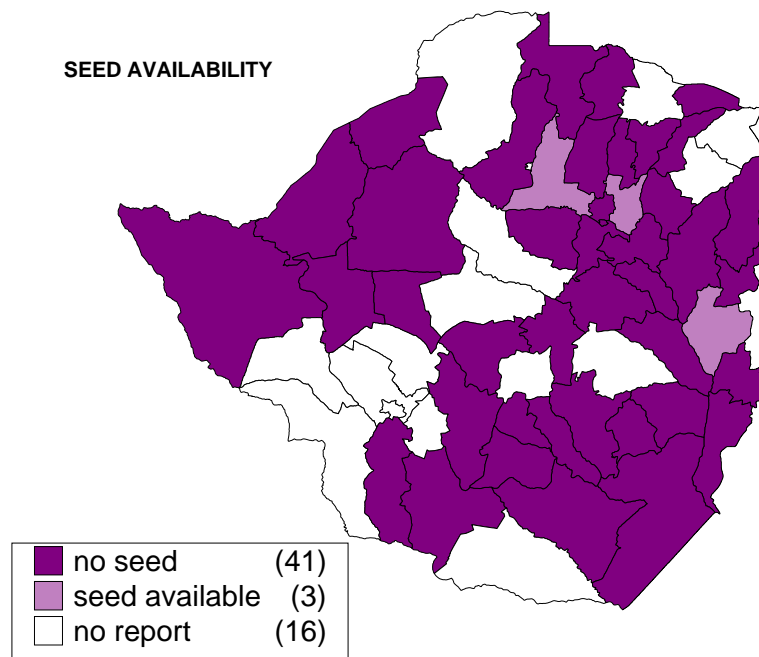
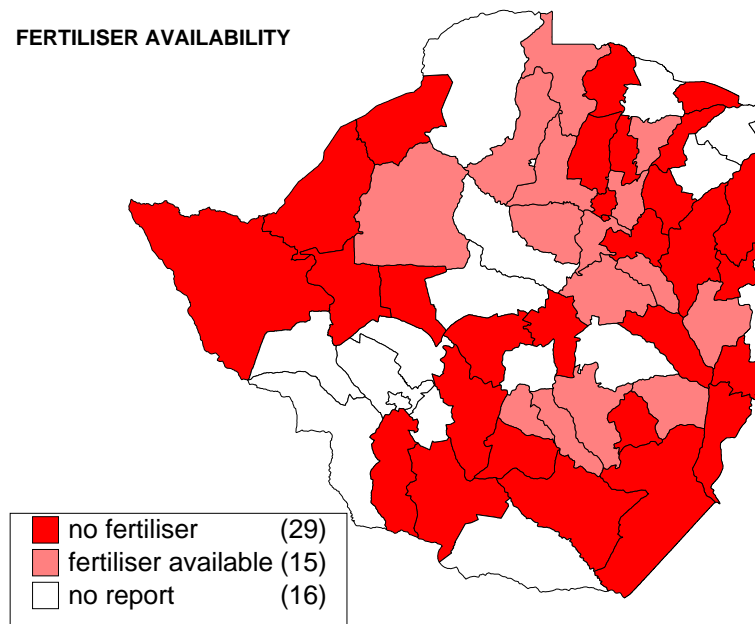


Figure 2: Fertiliser Availability July 2003



Scarcities and speculative trading in seed and fertilizer has driven prices upwards with a price differences from May to July of 140% for fertilizer and 150% for seed in the formal markets and up 86% for fertilizer and up to 125% for seed in the parallel market. With prices of up to Z\$12 000/10kg for fertiliser and \$15 000/10kg for seed, formal market prices are now closer to those in the parallel market than in May. (See Table 4)

Table 4: Price differences maize seed and fertiliser, May to July 2003

	Fertiliser Cost Z\$/10kg		Maize seed Cost Z\$/10/kg	
	Formal market	Parallel Market	Formal market	Parallel Market
Price range May	520 - 5000	1200 - 7000	600 - 6000	1000 - 15000
Price range July	2000 - 12000	3000 - 13000	4000 - 15000	3250 - 15000

The districts for which comparative prices were obtained within the district are shown in Table 5 below.

Table 5 : Maize seed and fertilizer prices for selected districts, July 2003

District	Fertiliser Cost Z\$/10kg		Maize seed Cost Z\$/10/kg	
	Formal market	Parallel Market	Formal market	Parallel Market
Manicaland				
Makoni	3000	8000	13000	
Mutare rural	3000	5000 - 13000	10000 - 15000	15000
Mutare urban	2600 - 6000	4000	12000	
Mashonaland East				
Chikomba	2400- 5000	3000	10000	10000
Marondera rural	5000	7000		
Mashonaland Central				
Bindura urban	3000	4000		
Guruve	2000 - 4000		6400	
Shamva	3600	3860	9000	14000
Midlands				
Mberengwa	5000	6000	15000	4000
Masvingo				
Masvingo urban	5600		9500	15000
Urban				
Bulawayo	5000 - 6530		9800 - 10000	3250
Harare	2600- 3000		4000 - 5000	
Chitungwiza	2600		5000	

Households currently face severe constraints in accessing farming inputs which will affect 2003 planting if not addressed. In five provinces all districts reported that seed was not available in July. In two provinces all districts reported fertilizer was not available in July. About a third of households report that they have no access to tillage or draught power. Matabeleland North and South are particularly disadvantaged.

(See Table 6)

Table 6: Household access to tillage /draught power, seed, fertiliser July 2003

Province	Average % households with access to tillage/draught power	% Districts reporting NO availability of seed	% Districts reporting NO availability of fertiliser
Manicaland	39%	87%	87%
Mashonaland East	67%	78%	44%
Mashonaland Central	79%	100%	67%
Mashonaland West	n.a	75%	25%
Midlands	68%	100%	40%
Masvingo	n.a	100%	43%
Matabeleland North	65%	100%	100%
Matabeleland South	54%	100%	100%

n.a = less than two reports per district

While support for these inputs is critical for production in the 2003/4 season. no reports were made of such inputs being organized. Only a quarter of districts reported that they had been visited by an AREX officer in the past

month. In only 7 districts (14%) were there reports that households had planted any winter crops (generally wheat). Households will thus be highly dependent on the food they produce in the coming season.

GMB Deliveries

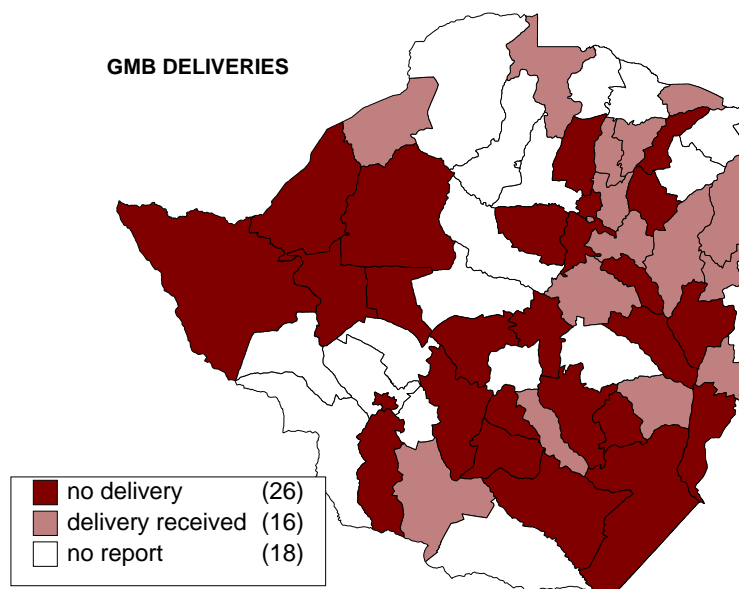
Grain Marketing Board does not have anything in stock hence people do not even await for deliveries from the GMB. They mostly depend on the parallel market.

Mutare

'There have been no GMB deliveries since January'
Makoni

The frequency of GMB deliveries in July was half that reported in May and the volume of grain less than 20% the May volume. Communities believe that GMB reduced its deliveries on the assumption that there were good harvests, even in places where harvests yield were poor.

Figure 3: Frequency of GMB Deliveries July 2003



The average number of reported deliveries to sentinel wards was 0.25 compared to the 0.6 reported in May, indicating a reduction of more than half in the frequency of deliveries. The reported volumes of deliveries also fell from 6,7 tonnes per delivery in May to an average of 1.1 tonnes per delivery reported in July. Only three districts Bindura urban, Nyanga and Marondera Rural reported improved GMB supplies.

As shown in Table 7, Buhera, Mutare urban, Chegutu, Chirumanzu, Lupane and Hwange urban appear to have had more sustained periods of no GMB deliveries.

Table 7: Districts with NO sentinel wards reporting any GMB deliveries in July 2003

Province	July 2003	May 2003	April 2003	March 2003
Manicaland	Buhera, Chipinge Mutare rural Mutare urban Mutasa	Buhera, Makoni, Rusape urban, Mutare urban	Mutare urban, Nyanga	Nil
Mashonaland East	Hwedza, Ruwa Marondera urban Murehwa, UMP Seke	Chikomba, Goromonzi	Goromonzi UMP	Chikomba, UMP Marondera urban
Mashonaland Central	Bindura rural Mazoe	Bindura urban Mt Darwin	Nil	Mt Darwin
Mashonaland West	Chegutu Makonde Norton	Chegutu, karo, urban, Kadoma, Hurungwe, Mhondoro	Chegutu Makonde	Chinhoyi urban Hurungwe Mhondoro
Midlands	Chirumhanzu, Gokwe, Gweru urban, Zvishavane Mberengwa,	Gweru rural and urban, Chirumhanzu	Chirumhanzu Gweru rural & urban, Mberengwa	Gokwe, Gweru rural, Shurugwi Zhombe
Masvingo	Chiredzi, Zaka Mwenezi, Chiredzi Masvingo rural	Gutu, Zaka, Mwenezi, Masvingo rural and urban	Masvingo rural Mwenezi	Zaka, Chiredzi Masvingo urban
Matabeleland North	Binga, Lupane Hwange rural Hwange urban Nkayi	Lupane, Hwange urban	Nil	Umguzha, Hwange
Matabeleland South	Matobo	Nil	Bulilimangwe Insiza	Gwanda

Some districts reported that farmers were compelled to sell their grain to GMB. In such districts the failure of GMB to deliver adequate supplies leaves the district with a food deficit. Such GMB generated deficits and the strong market incentive to sell grain in urban parallel markets reduces maize grain availability in rural areas.

People are being forced by the Government to sell to the GMB

Hwedza

In addition to overall reduced supplies, grain prices and political bias continue to be commonly reported obstacles to accessing GMB food. In several urban districts there were reports of political bias in maize meal distribution attributed to the impending council elections.

'GMB is only supplying the police and ex combatants'

Gweru urban

There has been a significant increase in the reported price of GMB maize from Z\$580/50kg to Z\$13000/50kg. The reported upper price range of Z\$2600/10kg in July is 420% of the April upper price of Z\$500/10kg. Hence even where GMB deliveries have been made price escalation is now a commonly reported barrier to access. (See Table 8).

Table 8 : Reported costs of GMB maize, Z\$/10kg

Province	Price range in Z\$/10kg		
	Jul-03	May-03	Apr-03
Manicaland	2600	106 - 380	116 - 300
Mashonaland East	2600	114 - 450	84 - 126
Mashonaland central	2000 - 2600	116 - 150	120 - 400
Mashonaland West	2600	120 - 1000	116 - 500
Midlands	2600	112 - 350	116 - 254
Masvingo	2140 - 2400	120 - 136	116 - 200
Matebeleland North		108 - 120	112 - 500
Matebeleland South	2600	100 - 136	100 - 124
Cities; Harare and Bulawayo	2000	250 - 1400	250 - 300

'Maize meal has not been a problem in this ward since some people harvested. However there is problem that the GMB has hiked the price of maize and many people will not afford the new price'

Goromonzi

Market Supplies

People have no money to buy because the prices are too high.

Masvingo

Commercial supplies of food have generally improved and are better than they were a year ago in August 2002. Matabeleland South and North, Masvingo and Mashonaland East continue to report consistently lower commercial food availability.

Table 9 : Reported market availability of foods, Aug 02 and July 03

% of districts reporting food present	Maize		Oil	
	July 03	Aug 02	July 03	Aug 02
Manicaland	63	33	100	83
Mashonaland East	44	44	89	89
Mashonaland Central	67	20	100	60
Mashonaland West	50	n.a	100	n.a
Masvingo	29	0	71	14
Midlands	80	43	100	29
Matabeleland North	20	40	100	0
Matabeleland South	33	0	66	33

'People are buying sugar in the black market in small quantities at Z\$300 a cup'.

Mazowe

Prices have increased sharply. Formal market prices of maize meal have increased significantly across the country. Although this has resulted in maize meal reappearing on shop shelves, the new average price in July of Z\$6000/10kg (double the May price) is reported to be too high for many households to afford.

'People in the ward are selling the little harvest and sheep so as to get money to buy sugar and maize meal from parallel market.'

Buhera

'Prices are too much. For everyone access is a problem because of lack of funds'

Chikomba

'Goods are expensive and people have no money. Commercial foods are available but the prices are so high that the ordinary people cannot afford them'
Mutare rural

Parallel market prices have also escalated to an upper price range of Z\$10000/10kg, a 136% increase on May prices. Price structures imply that farmers seeking to afford escalating seed and fertilizer costs will prefer to sell in parallel markets. With minimal GMB supplies and severe price escalation in GMB sales, poor people are finding it extremely difficult to access and afford maize. For areas like Matabeleland North and South that have had sustained food insecurity this is likely to escalate both poverty and malnutrition. (See Table 10).

Table 10: Upper prices of maize meal in parallel markets

Province	Upper prices of Maize meal in parallel Markets Z\$/10kg			
	July2003	May2003	April2003	March2003
Manicaland	8500	4000	3000	2500
Mashonaland East	10000	3000	3500	4000
Mashonaland central	10000	2400	4000	4000
Mashonaland West	5000	2500	2500	3000
Midlands		4500	4000	8000
Masvingo	7000	2500	3000	6000
Matabeleland North	7000	6000	4000	4000
Matabeleland South	n.a	1000	n.a	n.a
Cities; Harare and Bulawayo	7500	4000	5000	5000

Relief food

'Community leaders have tried to lobby with authorities to extend relief food to urban areas but there is no solution in sight'.

Bulawayo

There has been a marked reduction in the supply of relief food, with 27 districts (54%) noting that relief had stopped. Even in the 13 districts (26%) that reported some relief activities, all noted reduced supplies or inconsistent deliveries. No districts noted an improvement in relief supplies in July.

Relief was reported to have stopped in 54% of districts. The transition from relief to recovery seems from reports to be inadequate and participation of communities poor. Only half the districts reported that communities were adequately informed about relief supplies stopping. People were not clear about the criteria for stopping given the poor harvests. Only three districts reported any ongoing preparation for future food needs and there were no reports of support for production inputs. Districts predicted that poor local stocks would imply future relief needs in the coming months in 2003.

'Stakeholders should educate people about how and where to get relief food'

Harare

Of the 27 districts where supplies were stopped, 12 reported that communities had been informed of the suspension of the relief supplies. The state cash for work programme was reported to be operating in only 10 districts. Three districts (Binga , Makoni and Lupane) reported registration of villagers taking place to prepare for possible future rounds of food assistance. All districts reported that relief food will be needed as stocks from local harvests run out and many predicted that such needs would begin to emerge in the next three months. Problems with relief food are shown in Table 11.

'Since relief food has stopped coming people are starving'

Chikomba

Table 11: Reported problems in accessing relief in districts, July 2003

District	Issues reported
Buhera, , Shamva, Kariba urban, Chipinge, Zvishavane, Zaka, Lupane, Matobo, Seke, Nyanga , Mutasa, Chimanimani, Chikomba, Hwedza, Gokwe, Mberengwa, Gwanda	Agencies have scaled down supplies , the quantity of supplies have been reduced and the number of beneficiaries cut.
Masvingo rural, Mwenezi	AREX people said that people had harvested enough so relief stopped. But harvests are poor.
Marondera rural	Political leaders or youths are interfering with relief food and stopped agencies from distributing food.

Summary

This report outlines information drawn from 142 monitoring reports from 50 districts from all provinces of Zimbabwe for July 2003.

The improvement of food availability from local harvests has begun to plateau in July, forewarning future shortages in late 2003. Initial indicators suggest that food shortages may cover half of districts in the country. Many districts report that food needs are likely to be severe by October 2003.

After some improvement of household food stocks in March to May, stocks are now beginning to decline again. While nearly a quarter of households had more than one months food supply in May, this had fallen to 14% by July.

Districts reporting no improvement or worsening situations are clustered in Matebeleland North, Matebeleland South, and Manicaland. These are provinces where chronic food scarcities have been reported since 2002.

An increasing number of people are reported to be moving between districts to secure food. Although movement has become a critical survival strategy, it is also an increasingly costly and time consuming one, with 86% of districts reporting transport difficulties in July compared to 42% in May 2003.

Households currently face severe constraints in accessing seed and fertilizer which will affect 2003 planting if not addressed. In five provinces all districts reported that seed was not available and in two provinces all districts reported that fertilizer was not available. Prices of seed and fertilizer have increased since May 2003 by over 100% in formal and parallel markets. About a third of households report that they have no access to tillage or draught power. Matabeleland North and South are particularly disadvantaged.

While support for these inputs is critical for production in the 2003/4 season, no reports were made of such inputs being organized. Only a quarter of districts reported that they had been visited by an AREX officer in the past month. In only 7 districts (14%) were there reports that households had planted any winter crops (generally wheat). This indicates that households will significantly dependent on any foods produced in the coming season.

Inadequate or absent GMB supplies continue to be noted. The frequency of GMB deliveries in July was half that reported in May and the volume of grain less than 20% the May volume. Communities believe that GMB reduced its deliveries on the assumption that there were good harvests even in places where harvests yield were poor.

Some districts reported that farmers were compelled to sell their grain to GMB. In such districts the failure of GMB to deliver adequate supplies leaves the district with a food deficit. Such GMB generated deficits and the strong price incentive for farmers to sell their grain in urban parallel markets has reduced maize grain availability in rural areas.

There has been a significant increase in the reported price of GMB maize from Z\$580/50kg to Z\$13000/50kg.

Commercial supplies of food have generally improved and are better than they were a year ago in August 2002.

Commercial supplies have however escalated in cost. Parallel market prices have increased to an upper price range of Z\$10 000/10kg, a 136% increase on May 2003 prices. With both GMB and commercial price escalation, poor people are finding it extremely difficult to afford maize. For areas like Matabeleland North and South that have had sustained food insecurity, supply side scarcities and cost inflation are likely to escalate both poverty and malnutrition.

Relief was reported to have stopped in 54% of districts. The transition from relief to recovery seems from reports to be inadequate and the participation of communities poor. Only half the districts reported that communities were adequately informed about relief supplies stopping. People were not clear about the criteria for stopping and were concerned given the poor harvests. Only three districts reported any ongoing preparation for future food needs and there were no reports of support for production inputs.

Districts predicted that with poor local stocks relief needs would increase in late 2003. Communities were however most concerned about the continued problems in accessing production inputs to move from relief to recovery.

Food scarcities are thus likely to grow in the coming months. Of even greater concern is the fact that even if rains are good, unless seed and fertiliser are made available harvests could continue to be poor. This will especially affect the poorest households who cannot afford the priced inflation on these inputs, widening income inequality in rural areas.