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FAO/WFP CROP AND FOOD SUPPLY ASSESSMENT MISSION TO ZIMBABWE

1 June 2001

Mission Highlights

1. OVERVIEW

2. SOCIO-ECONOMIC CONTEXT AND FOOD SECURITY

- 2.1 Land reform in Zimbabwe
- 2.2 Agriculture in the national economy

3. FOOD PRODUCTION IN 2000/01

- 3.1 Rainfall
- 3.2 Inputs
- 3.3 Pests and diseases
- 3.4 Area planted
- 3.5 Yields
- 3.6 Cereal production forecast for 2001/02
- 3.7 Livestock

4. PRODUCTION SITUATION BY PROVINCE

- 4.1 Mashonaland West Province
- 4.2 Mashonaland Central Province
- 4.3 Mashonaland East Province
- 4.4 Masvingo Province
- 4.5 Manicaland Province
- 4.6 Matebelaland North Province
- 4.7 Matebelaland South Province:
- 4.8 Midlands Province

5. FOOD SUPPLY AND DEMAND IN 2001

- 5.1 Cereal market and prices
- 5.2 Cereal supply/demand balance, 2001/02

6. FOOD SECURITY AND VULNERABILITY ASSESSMENT

- 6.1 Vulnerability among farming communities
- 6.2 Vulnerability among non-farming communities
- 6.3. Strategies for possible food assistance

Mission Highlights

- Cereal production for the current marketing year (Apr-01 to Mar-02) is forecast at about 1.82 million tonnes, 24 percent down from last year, reflecting reduced plantings and a drop in yields.
- The large scale commercial sector experienced a decline of about 30 percent in area planted under all crops during the main season primarily due to the disruptions caused by land acquisition activities. Maize was especially affected as it showed a decline of 54 percent in area planted. An additional reason for maize area reduction was its reduced profitability relative to other crops.
- The reduction in maize area (8 percent) and production (12 percent) in the communal sector is largely due to payment delays for the previous year maize crop by the state-owned Grain Marketing Board (GMB). High annual inflation (over 50 percent) and the rising costs of inputs further encouraged a switch from maize to cash crops such as soybeans, sunflower, groundnut and paprika.
- Cereal import requirements for marketing year 2001/02 are estimated at 579 000 tonnes, of which 132 000 tonnes of wheat and rice is anticipated to be covered by commercial imports, leaving a balance of 447 000 tonnes of maize which will need to be covered by a draw-down on stocks or, preferably, through commercial imports. Bilateral programme food aid to meet part of the import requirement may be considered as an option.
- Emerging food insecurity problems in the country are primarily due to diminishing purchasing power. The urban poor and many households in food deficit southern and eastern areas of the country are particularly vulnerable to food shortages and would need to be targeted for assistance.
- The ongoing land redistribution programme poses a number of complex problems. Appropriate measures need to be taken to minimise its negative impact on agricultural productivity and food production.

1. OVERVIEW

An FAO/WFP Crop and Food Supply Assessment Mission visited Zimbabwe from 25 April to 11 May 2001 to estimate the production of the main season cereal and pulse crops, forecast the 2001/02 winter season harvest, and assess food import requirements. Three teams comprising of a staff member from FAO/GIEWS, two international consultants and two national consultants from FAO along with two staff members (one international and one local) from WFP visited 12 selected districts from all five agro-ecological zones in the country covering all eight provinces. These teams were assisted by specialists from the Ministry of Lands, Agriculture and Rural Resettlement (MLARR). USAID's Famine Early Warning System (FEWS) Network joined one of the teams.

The crop assessment teams obtained data relating to area and yield collected by District Extension Agents (DEAs) of AGRITEX and by the national Crop Forecasting Committee. Interviews were held with farmers, traders, NGOs, project workers and government officials during field visits. Crop inspections, spot check crop cuts, market surveys and livestock condition observations were conducted *en route*. In addition, the Mission teams were provided with remote sensed data regarding rainfall estimates, vegetation indices and interim reports, assessments and vulnerability maps. Thus, the teams were able to fine-tune initial MLARR yield forecasts, taking into consideration a wider information base and recent events. The food security assessment members of the teams collected information on household food security, vulnerability, coping mechanisms and social welfare programmes of assistance for the districts visited. A standardised questionnaire was used for semi-structured interviews at farm household and district levels. The information obtained was checked against crop and livestock production data and compared with the previous year and an average of the 1990s.

Similar to the pattern of the previous year, the 2000/01 rainy season was generally favourable for the northern provinces of the country which normally produce nearly 70 percent of the national cereal

harvest. But, rains were late and below normal in the southern and eastern areas of the country. There was a dry spell during January in most parts of the country followed by widespread incessant rains in February and March which resulted in localised flooding.

The area under grain crops in the 2000/01 main crop season decreased by 15 percent compared to the previous year. The area planted to maize in the large scale commercial farming sector was reduced by more than half primarily due to land acquisition activities. The smallholder sector including the resettled areas did not make up for this reduction in maize plantings. Some of the decrease in total maize area was compensated by an increase in the area under soybeans, groundnuts, sunflower and paprika.

The Mission estimates a national cereal harvest of 1.57 million tonnes (27 percent lower) in the 2000/01 main cropping season, compared to 2.15 million tonnes in 1999/00. Maize production this season is estimated at 1.47 million tonnes which accounts for the largest share (over 90 percent) of the total grain production.

Livestock condition was generally good in the large scale commercial sector while in the smallholder sector it ranged from fair to good. However, animal deaths due to tick borne diseases were reported in some communal areas. Pastures and water availability conditions were generally good in most provinces of the country.

Based on the forecast production, the import requirement is estimated at 579 000 tonnes. Given the substantial decline in gold production and the tobacco harvest, and much of the expected foreign currency earnings being pre-committed for fuel, other energy imports and the international debt servicing, Government's ability to import maize is extremely limited. Even if the wheat and rice deficit of 132 000 tonnes were to be met by commercial imports by private traders primarily by raising foreign currency in the parallel market, there remains a net deficit of about 447 000 tonnes of maize to be covered by imports or by drawing down on stocks. Given the current economic conditions and food insecurity in several parts of the country, a major draw down of stocks may not be advisable. The country needs to hold adequate cereal stocks to maintain stable and adequate supply necessary to prevent any price escalations and to keep prices at affordable levels for both rural and urban population.

Free food aid distribution is not appropriate. Bilateral programme food aid may be considered as an option to help ensure an adequate grain supply at affordable prices in the deficit areas, both rural and urban.

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2. SOCIO-ECONOMIC CONTEXT AND FOOD SECURITY[1]

Zimbabwe is currently facing economic and agricultural decline. It is becoming clear that this decline can have serious implications for food security as prospects for recovery in agriculture and other sectors of the economy in near future are not encouraging. The gross national product is expected to decline by 5 percent in 2001. This would amount to a decline in per capita income for a third year in a row, with a cumulative decrease of 18 percent during 1999-2001. In addition, the country is facing an acute foreign exchange crisis limiting its ability to import fuel, energy and basic food grains to meet the looming food deficit. Government has fixed the currency exchange rate at Z$ 55 to 1 US dollar since October 2000, while the parallel market rate in April 2001 was around Z$ 120. Consequently, much of foreign currency finds its way into the parallel market (some estimates indicate about 75 percent), exacerbating the problem of hard currency shortages for the Government.

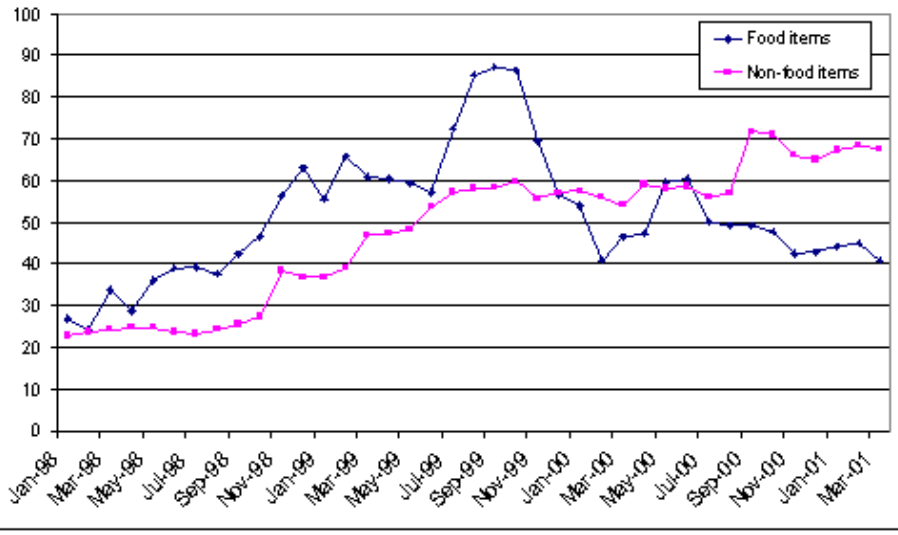
The total external debt of Zimbabwe is estimated at US$ 4.45 billion resulting in debt servicing costs due as a percentage of exports for 2000 at the unsustainably high level of 69 percent. The projected balance of payments for 2000 was a negative US$ 611 million with a build-up in arrears to external creditors of over US$ 500 million. The country had to suspend its debt payments to the IMF, World Bank and other creditors; consequently, the debt service actually paid during 2000 was 38 percent of the value of total exports. The overall external trade position of the country during 1996-2000 period ranged from a net import level of US$ 111 million in 1998 to a net export level of US$ 379 million in 2000. However, with gold and tobacco production down and receipts from the tourism industry plummeting, the country's total export earnings are expected to decline substantially during 2001.

The economy is also undermined by persistently high inflation. The rate of inflation has been 32, 58 and

57 percent during 1998, 1999 and 2000 respectively. The latest data puts annual inflation for March 2001 at 55.8 percent slightly lower than 57.7 percent during the month before. The situation may worsen due to relaxed monetary policies and a continued budgetary deficit (estimated at 23 percent of GDP). The prices of maize are stabilising in this harvest/post-harvest period. However, prices of wheat (a winter season crop planting of which will begin soon) are rising fast. For example, wheat prices at the commodity exchange (ZIMACE) increased from Z$ 7 729 in March 2000 to Z$ 15 261 in March 2001 (98 percent increase). The cost of the basic food basket has gone up by 57 percent (in February 2001 compared to the same period a year ago) almost at the same rate as the official inflation rate. Food price inflation has come down from the highest level of 87 percent per annum in September 2000 to about 40 percent in March 2001 and has remained generally lower than the non-food items inflation rate since January 2000 (Figure 1).

Rapid inflation combined with high levels of unemployment is eroding the purchasing power of households and worsening the problem of food security in the country. The rate of unemployment is around 40 to 50 percent. A recent survey indicated that a total of 400 companies (including 171 motor traders, 92 steel manufacturers, and 45 clothing and textile companies) closed during 2000. Business closures and the down-sizing of an additional 350 companies led to 10 000 workers losing their jobs (Zimbabwe Chamber of Commerce).

Figure 1: Annual inflation rates for food and non-food items, Jan-98 to Feb-01



Source: Central Statistical Office, Zimbabwe.

Out of 174 countries analysed by UNDP[2], Zimbabwe ranks 130th on the Human Development Index (HDI) and 112th on the GDP per capita (purchasing power parity basis) index. The HDI ranking is low due to low life expectancy. Zimbabwe is one of the worst affected countries by AIDS which has reached almost an epidemic proportion. Life expectancy at birth in 1998 was 39.2 years while without the AIDS scenario it would have been 64.9 years (US Bureau of the Census). Life expectancy according to UNDP is 43.5 years.

GDP per capita in 1998 was US$ 471 but using the purchasing power parity it was estimated at US$2 669 which is relatively high in comparison with other less developed countries. Population below the US$ 1 per day poverty line is 36 percent of the total (1989-94). A Poverty Assessment Study (1995) by the Ministry of Public Service, Labour and Social Welfare showed that 57 percent of the population was below the food poverty line and an additional 17 percent was below the total consumption poverty line.

High unemployment levels combined with high cost of living in recent years have made the poverty situation worse. Particularly caught in this double squeeze are the urban unemployed and the urban poor. Other food insecure groups include (a) farmers who were affected by the January dry spell and February-March heavy rains causing water logging predominantly in the southern parts of the country,

and (b) farm workers who have been out of work since the farm invasions or land acquisitions for re-distribution. Their situation in aggregate does not seem to be as desperate as previously thought since many of the workers may still be partially employed and partially paid by the land owners.

In rural areas where food insecurity is becoming a problem, the main coping mechanism is remittances from men or children working in the cities. If the urban unemployment increases due to factory shut downs, this income stream could dry up taking away one of the important coping mechanisms from the rural poor and food deficit households.

2.1 Land reform in Zimbabwe

Land distribution in Zimbabwe since independence in 1980 has remained highly skewed. According to Commercial Farmers Union data for 1995, the average size of large scale commercial farms (4700 in total) was 3000 ha as opposed to less than 30 ha for the communal and resettled area farms (862 000 in total). However, large scale commercial farms being highly capital intensive and dependent on relatively low wage labour force (on average 40 workers per farm) contributed 80 percent of the national agricultural output.

In order to re-distribute agricultural land, the Government has implemented various land reform programmes. The land acquisition and settler emplacement (Phase 1) programme from 1979/80 to 1997/98 acquired 3 498 444 ha and emplaced 71 000 new settlers[3]. During the new "Inception Phase" from October 1998 to June 2000, 85 more farms covering area of 168264 ha were acquired for redistribution. The so-called "Fast Track" programme was initiated in July 2000 and by April 2001 a total of 2 706 farms with 6 086 605 ha of land have been designated for mandatory acquisition and re-distribution. Between July 2000 and 9 February 2001, a total of 51 543 households were settled on 2 083 301 ha of land. All of the large scale commercial farms that have been designated even if not yet acquired, no longer have access to credit from banks. Those farms that are not yet listed for acquisition are uncertain about making preparations and the necessary investments in inputs for the next season's crops. In many cases long term investments have completely ceased. This will have a negative impact on agricultural productivity and production in the short term at least, and measures need to be taken to ensure recovery in long-term agricultural growth.

2.2 Agriculture in the national economy

Agriculture is one of the most important sources of employment accounting for about 27 percent of total employment during 1994-98 period. Agricultural exports are very important to the national economy as they earn the major share of the foreign exchange. In 2000 agricultural exports represented about 42 percent of total exports (US$ 1708 million) of which tobacco (26 percent) and cotton (6 percent) were the leading export earners. Normally Zimbabwe exports its surplus maize but the country had to import during the drought (or flood) years of 1992, 1993, and 1998 and again in 1999 (Figure 3). The country is generally deficit in wheat with an average net import level of about 75 000 tonnes per year during last six years (1994/95 to 2000/01).

3. FOOD PRODUCTION IN 2000/01

3.1 Rainfall

Similar to the pattern of last year the 2000/01 rainy season was generally favourable for the northern provinces of the country which normally produce nearly 70 percent of the national cereal harvest. However, it was not very favourable for crop production in the southern areas of the country as it started late and was below normal. Although there was a dry spell during January in most parts of the country, widespread heavy rainfall in February and March resulted in above normal rainfall for the season for most parts of the country. The 2000/01 season was peculiar in that it commenced over the central and northern areas first instead of as normal in the south and western areas. The north and central parts of the country received above normal rainfall up to December. The southern districts suffered from persistent dry spells.

The rainy season effectively started from the third dekad of October for most areas in Mashonaland East, Mashonaland West and Masvingo Provinces. For Mashonaland Central and Matebeleland North, the season started from the second dekad of November, whilst it started very late for most parts of Matebeleland South. The month of November was generally wet particularly over northern areas. In December, substantial amounts of rainfall were received over large areas of central, northern, western and eastern districts but the southern districts of Gwanda, Masvingo, Bulawayo and Beitbridge received below-normal rainfall. In January, the extreme north and extreme south-west received above 70 mm of rainfall. However, the total rainfall received during January in most parts of the country was very low compared to their long-term average. In most southern and eastern districts there was a prolonged dry spell during the whole month of January followed by excessive and continuous rains during February. These heavy rains in February resulted in nutrient leaching, water logging and flooding in some areas in Muzarabani, Guruwe, Kadoma, Chegutu, Masvingo, Tsholotsho and Gokwe Districts.

An abnormally slow movement of the Inter Tropical Convergence Zone (ITCZ) northwards resulted in widespread heavy rainfall in most parts of the country during March. Most areas received more than 100 percent of their average rainfall for the season except Beitbridge and adjacent areas in the south and Southwest that received 60 to 80 percent of the mean. The distribution of rainfall was also abnormal in this cropping season.

3.2 Inputs

As in the past years, this year about 90 to 95 percent of the maize seeds used by smallholder sector farmers were certified hybrid seeds. Although the price of hybrid maize seeds increased sharply (from 48 Z$/kg in the previous cropping season to 104 Z$/kg) most small scale farmers in the northern provinces used hybrid maize seeds. Only about 15 to 20 percent of the small farmers in the southern and eastern provinces used open pollinated retained maize seed. For sorghum and millet crops the seeds used were from local varieties carried over from last year's harvest. In some areas the seed source for sorghum and millets was reduced due to cyclone Eline which occurred in early 2000. However, in all provinces cereal and pulse seed availability in general was not a constraint.

National fertiliser use decreased by 10 percent from the planned 500 000 tonnes to 450 000 tonnes. This is mainly attributed to the decrease in area planted by the commercial farming sector. The pattern of use of Compound D (7N-14P-7K) basal fertiliser and Ammonium Nitrate (34.5 percent N) for top dressing, which are the two main types used, vary significantly among provinces based on the rainfall conditions. Fertiliser use in the northern provinces was much higher because of better rainfall distribution compared to the southern and eastern provinces where the conditions are generally drier with erratic rainfall. In spite of a sharp increase in fertiliser prices, most farmers in the northern provinces, even smallholders, used normal amounts. Most small farmers in the southern and eastern provinces did not use much fertiliser but relied on cattle manure.

Use of credit by the smallholder sector for the purchase of inputs is generally very limited. GMB provided seeds and fertilisers through credit very late this year, particularly in the southern and eastern provinces.

3.3 Pests and diseases

The only migratory pest noted were quelea birds on sorghum and pearl millet mostly in the south and south-west, with areas adjoining national parks particularly affected. Among the non-migratory pests and diseases of some significance this year were stalk borer, grey leaf spot, cob rot and streak virus on maize, aphids on finger millet, leaf rusts in soybeans and groundnuts.

3.4 Area planted

The total area under grain crops in the 2000/01 crop season is estimated at 1 489 000 hectares. This represents a 15 percent decrease compared to 1999/00 (Table 1). The area planted to maize, sorghum and pearl millet decreased by 14, 37 and 14 percent respectively, but the area planted to finger millet increased by 49 percent. The 14 percent decrease in maize area is largely due to the 54 percent decrease in the commercial farming sector and 8 percent reduction in small holder sector. The decline in maize area in the commercial farming sector is attributed mainly to the recent land resettlement

programme. Some reduction in maize area in the smallholder sector was due to the perceived "lack of market" since GMB paid very late for the maize last season, which resulted in diversion of land by some farmers to soybeans, finger millet, sunflower and paprika.

Nationally, the area planted to cereals, pulses and other cash crops in 2000/01, approximately 2.38 million hectares, was lower by 7 percent compared to 2.56 million hectares in 1999/00. The smallholder sector accounted for 90 percent of the total cropped area in the 2000/01 compared to 86 percent in the last crop season. The smallholder sector contributes mostly in the area under grain crops, cotton, groundnuts and sunflower. Of the total area planted by this sector, 66 percent was planted to grain crops. Maize covered 53 percent of the area under crops followed by 17 percent and 12 percent under cotton and groundnuts respectively. The commercial farming sector accounted for only 10 percent of the total cropped area in 2000/01 compared to 14 percent in the previous year.

3.5 Yields

This year, average maize yield in the predominantly smallholder sector is expected to be around 0.95 t/ha and in the large scale commercial farming sector around 5.2 t/ha. The yields have been calculated from the estimates provided by the AGRITEX district/provincial staff and the National Early Warning Unit of the Ministry of Lands, Agriculture, and Rural Resettlement. They were cross-checked with historical data, key correspondent information and field observations. For crops other than maize, no district-level data was available, hence the national level estimates made by MLARR and the Crop Forecasting Committee are used by the Mission.

The average yield of maize is estimated to be about 13 percent lower this year (around 1.2 t/ha) than in 1999/00. The average yields estimated for other cereal crops in the 2000/01 main cropping season are 0.55 t/ha for sorghum; 0.2 t/ha for pearl millet and 0.4 t/ha for finger millet.

3.6 Cereal production forecast for 2001/02

Zimbabwe has two cropping seasons, the main rainy season usually starting in October-November and ending in April-May. Much of the country's cereal production comes from this season. The second minor season (called winter season) dependent mostly on irrigation is primarily in the commercial sector. The main crops, wheat and barley, are planted in April-May and harvested in September-October.

3.6.1 Main season crop production

Table 1 shows a national cereal harvest of 1.57 million tonnes in 2000/01 main cropping season. This is 27 percent lower than the 2.15 million tonnes in 1999/00 and 18 percent less than 1.9 million tonnes average of the past ten years.

Cereals

Maize production this season is estimated at 1.47 million tonnes or 93 percent of the total grain production. This production is 28 percent and 16 percent lower than the 1999/00 production and the 1990s average respectively. This decrease in production can be attributed to the reduction in area planted in the large scale commercial sector and reduction in area and yields in the smallholder sector. Other factors responsible were: the late start of the season in the southern areas of the country coupled with the effects of long January dry spell; reduction in use of fertilisers; use of open pollinated and retained seeds instead of high yielding hybrid maize seeds; and late disbursement of Z$900 million to GMB and Cotton Company of Zimbabwe (COTTCO).

Table 1. Zimbabwe: Area, yield and production of cereals, pulses and cash crops in 2000/01 main cropping season

CROP/SECTOR	2000/01 MAIN CROPPING SEASON			1999/00 MAIN CROPPING SEASON			2000/01 Vs. 1999/00	
	Area	Yield	Production	Area	Yield	Production	%Change	%Change

	Area (ha)	Yield (t/ha)	Production (tonnes)	Area (ha)	Yield (t/ha)	Production (tonnes)	%Change in Area	in Production
MAIZE								
COMMERCIAL SECTOR[a/]	74 005	5.19	384 316	162 000	5.00	810 000	-54.3	-52.6
SMALLHOLDER SECTOR[b/]	1 149 061	0.94	1 082 432	1 254 700	0.98	1 233 204	-8.4	-12.2
TOTAL MAIZE	1 223 066	1.20	1 466 748	1 416 700	1.44	2 043 204	-13.7	-28.2
SORGHUM c/								
COMMERCIAL SECTOR	5 300	3.50	18 550	4 500	4.00	18 000	17.8	3.1
SMALLHOLDER SECTOR	105 000	0.40	42 190	170 730	0.26	43 914	-38.5	-3.9
TOTAL SORGHUM	110 300	0.55	60 740	175 230	0.35	61 914	-37.1	-1.9
PEARL MILLET								
SMALLHOLDER SECTOR	98 870	0.20	20 151	115 100	0.25	29 030	-14.1	-30.6
FINGER MILLET								
SMALLHOLDER SECTOR	57 200	0.40	22 880	38 400	0.36	13 860	49.0	65.1
ALL CEREAL GRAINS	**1 489 436**	1.05	**1 570 519**	**1 745 430**	1.23	**2 148 008**	**-14.7**	**-26.9**
SOYBEANS								
COMMERCIAL SECTOR	65 000	2.50	162 500	58 000	2.50	145 000	12.1	12.1
SMALLHOLDER SECTOR	12 150	1.04	12 580	5 490	0.90	4 941	121.3	154.6
TOTAL SOYBEANS	77 150	2.27	175 080	63 490	2.36	149 941	21.5	16.8
GROUNDNUTS (Unshelled)								
COMMERCIAL SECTOR	2 000	2.50	5 000	1 400	3.00	4 200	42.9	19.0
SMALLHOLDER SECTOR	274 120	0.61	166 784	266 700	0.70	186 690	2.8	-10.7
TOTAL GROUNDNUTS	276 120	0.62	171 784	268 100	0.71	190 890	3.0	-10.0
SUNFLOWER								
COMMERCIAL SECTOR	2 000	1.00	2 000	1 500	2.00	3 000	33.3	-33.3
SMALLHOLDER SECTOR	42 500	0.69	29 500	25 000	0.51	12 750	70.0	131.4
TOTAL SUNFLOWER	44 500	0.71	31 500	26 500	0.59	15 750	67.9	100.0
PAPRIKA								
COMMERCIAL SECTOR	3 250	3.50	11 375	3 100	4.00	12 400	4.8	-8.3
SMALLHOLDER SECTOR	4 985	0.28	1 414	2 104	0.70	1 473	136.9	-4.0
TOTAL PAPRIKA	8 235	1.55	12 789	5 204	2.67	13 873	58.2	-7.8

TOBACCO								
COMMERCIAL SECTOR	67 112	2.79	187 064	77 291	3.01	232 941	-13.2	-19.7
SMALLHOLDER SECTOR	12 395	0.71	8 841	14 876	0.82	12 213	-16.7	-27.6
TOTAL TOBACCO	79 507	2.46	195 905	92 167	2.66	245 154	-13.7	-20.1
COTTON								
COMMERCIAL SECTOR	17 000	1.92	32 666	26 400	2.00	52 798	-35.6	-38.1
SMALLHOLDER SECTOR	373 473	0.68	253 447	343 535	0.87	300 202	8.7	-15.6
TOTAL COTTON	390 473	0.73	286 113	369 935	0.95	353 000	5.6	-18.9
GRAND TOTAL	**2 365 421**			**2 570 826**			**-8.0**	

a/Commercial sector includes large scale commercial farmers
b/ Smallholder sector includes communal farmers, small scale commercial farmers and resettled farmers
c/ For crops other than maize, no district-wise data for all sectors was made available hence the national level estimates prepared by MLARR and the Crop Forecasting Committee are judged as reasonable and are used in this report by the Mission.

Although the drought tolerant sorghum and pearl millet crops performed relatively better than maize this year, still the production of these crops is expected to decrease by about 2 percent and 31 percent respectively compared to last year mainly due to a reduction in area planted by the smallholder sector. On the contrary, finger millet production is expected to increase significantly this year by nearly 65 percent compared to last season because of a major increase in area (49 percent) by smallholder sector.

Other food crops

The area planted to soybeans, sunflower and groundnuts in 2000/01 main cropping season increased by 22 percent, 68 percent and 3 percent respectively compared to last year. The increase is attributed to higher producer prices expected this season.

The aggregate pulse harvest (mainly soybeans and groundnuts) is estimated at 346 000 tonnes compared to 340 000 tonnes in 1999/00. Soybean production is forecast to increase by 17 percent this year compared to last season mainly because of 22 percent increase in area. Groundnut production is forecast to decrease by 10 percent in spite of a slight increase (3 percent) in area mainly because of the long dry spell in January and persistent rains in February. Sunflower production is forecast to increase by nearly 100 percent on last year due to an increase in area of 68 percent, mainly in the smallholder sector. Area under sunflower in the smallholder sector increased by 131 percent compared to last year.

Cash crops

In the 2000/01 main crop season the area planted to cotton increased by 6 percent compared to last cropping season as more and more farmers venture into this crop particularly in south-eastern parts of the country. Area under tobacco decreased by 14 percent this year compared to last season (Table 1).

Production of cash crops (cotton and tobacco), which contributes to agricultural foreign currency earnings, is expected to decrease compared to the last crop season. Tobacco production is expected to decrease by 20 percent. This decrease is partly attributed to the disturbances in the commercial farming areas where most of the crop is grown. The decrease in cotton production can be explained by the lower producer price and the high cost of inputs. The production of other cash crops, namely sunflower and paprika is expected to increase as these crops have been adopted by smallholders in addition to soybeans and groundnuts over the recent past.

3.6.2 Winter season crop production

Wheat and barley grown during the winter cropping season (between May and September) are important crops and contribute significantly directly and indirectly to the economy of Zimbabwe. Wheat is used extensively for bread production and to a lesser extent for confectionery purposes. Barley is used for brewing beer, though some of the grain (in the form of malt) is exported within the region to earn valuable foreign exchange. In the past, wheat bread was described as a luxury food catering only to high income consumer groups. However, since independence, consumption of wheat has increased considerably, especially by low income urban consumers, and now it is considered as Zimbabwe's second staple food.

Wheat and barley production is highly mechanised. During the last five years the total area under wheat ranged between 46 000 and 57 000 hectares, with average yields of 5 to 6 tonnes/ha. Production ranged from 250 000 to 324 000 tonnes (Table 2). Because of the current situation on commercial farms, wheat area and production are expected to further decline significantly in 2001. Many farms have been designated for acquisition or are experiencing work stoppages that may interfere with winter wheat production. Since this year's wheat crop is not yet planted, it is difficult to estimate production. However, the Zimbabwe Cereal Producers Association forecasts a wheat harvest of about 250 000 tonnes, which is well below the usual domestic consumption.

3.7 Livestock

Livestock condition is reported to be good in the large scale commercial sector while in the smallholder sector it ranges from fair to good. However, animal deaths due to tick borne diseases have been reported in some communal areas, including in Matebeleland North and South, Mashonaland Central, Mashonaland East and Manicaland Provinces due to erratic dipping caused by shortage of chemicals (acaricides). There were reports of lumpy skin disease in Matebeleland North Province.

Table 2. Zimbabwe: Wheat and barley area, yield and production for 1991-2000 and forecast for 2001

	Wheat			Barley		
	Area (ha)	**Yield** (t/ha)	**Production** (tonnes)	**Area** (ha)	**Yield** (t/ha)	**Production** (tonnes)
1991	44 000	5.9	259,320	5,605	5.6	31600
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	5.5	255 063	5,128	6.2	32,200
2001	45,455	5.5	250 000	4,545	5.5	25 000

Source: Zimbabwe Cereals Producers Association; 2001 forecast by the Mission.

The total number of various livestock in the country as per the most recent (1999) livestock census is as follows: cattle: 6 068 764; sheep: 640 175; goats: 2 909 870; pigs: 278 811 and donkeys: 373 122.

The smallholder sector owns 72 percent of the total cattle population while the remaining 28 percent are owned by the commercial farming sector. Furthermore, the smallholder sector owns 94 percent of the sheep and goat population while the commercial sector owns only 6 percent. The commercial farming sector holds 48 percent of the total pig population against 52 percent held by the smallholder sector. With the current climate of uncertainty on the commercial farms, livestock numbers are anticipated to decline this year.

Pastures and water availability are generally good in most provinces. Because of good rainfall during the months of February and March, grazing quality and quantity have improved in most areas.

4. PRODUCTION SITUATION BY PROVINCE

The estimated area, yield and production of maize by province are presented in Table 3.

Table 3. Zimbabwe: Maize area, yield and production estimates by province in 2000/01 main cropping season

PROVINCE	COMMERCIAL FARM SECTOR			SMALLHOLDER SECTOR			TOTAL		
	Area (ha)	Yield (t/ha)	Production (tonnes)	Area (ha)	Yield	Production (tonnes)	Area (ha)	Yield (t/ha)	Production (tonnes)
MANICALAND	3 047	5.00	15 235	155 582	1.04	161 684	**158 629**	**1.12**	**176 919**
MASHONALAND CENTRAL	5 140	5.40	27 770	135 035	1.63	220 211	**140 175**	**1.77**	**247 981**
MASHONALAND EAST	8 550	5.25	44 888	211 586	1.18	248 740	**220 136**	**1.33**	**293 628**
MASHONALAND WEST	55 280	5.19	287 165	143 639	1.31	188 045	**198 919**	**2.39**	**475 210**
MASVINGO	625	5.00	3 125	169 645	0.66	111 119	**170 270**	**0.67**	**114 244**
MATEBELELAND NORTH	348	4.50	1 566	89 728	0.71	63 486	**90 076**	**0.72**	**65 052**
MATEBELELAND SOUTH	0	0.00	0	35 513	0.28	10 034	**35 513**	**0.28**	**10 034**
MIDLANDS	1 015	4.50	4 568	208 333	0.38	79 112	**209 348**	**0.40**	**83 680**
NATIONAL TOTAL	**74 005**	**5.19**	**384 316**	**1 149 061**	**0.94**	**1 082 432**	**1 223 066**	**1.20**	**1 466 748**

4.1 Mashonaland West Province

Most areas in this province are in agroecological region II (intensive farming) but some areas are in agroecological region III (semi-intensive farming). Maize is the main crop for the smallholder sector and tobacco for the commercial farming sector. Some of the districts like Hurungwe are very productive but others like Kariba, Kadoma and Zvimba have a structural food deficit problem. Normal planting time in this province is from mid-November to mid-January. Most districts in this province experienced a dry spell of three weeks from early January, followed by heavy rains in February and March. However, the dry spell was less intense than in other regions of the country and generally the heavy rains did not affect the maize crop, except in some locations. Farmers who planted maize late suffered from excessive rains and this will lead to a slightly reduced harvest. Rainfall distribution was quite similar to last year, which also recorded a dry spell and excessive rains. In some areas, cobrot due to excessive

rains reduced yields and quality of the maize. Fertilisers are widely used by maize growers in this province.

Overall the Mission estimates that yields would be around or slightly lower than last year, varying according to areas. The estimated production of maize in 2000/01 crop season is 475 210 tonnes from a total area of 198 919 hectares from both sectors, of which 287 165 tonnes is expected from the commercial farming sector and 188 045 tonnes from the smallholder sector (Table 3). This province is estimated to produce the highest share of (32 percent) of total national maize production and is generally the largest maize producing province in Zimbabwe.

4.2 Mashonaland Central Province

Most areas in this province fall under agroecological region II (intensive farming) and III (semi-intensive farming). The areas visited by the Mission generally appeared to be very productive. In low-lying areas where cotton is the main crop the maize crop did not look good. The dry spell experienced in most of January and February lasted up to six weeks in some areas. Heavy rains followed until March. However, the maize crop did not appear to have been affected much as the majority of the farmers planted early.

Maize is the main crop for the smallholder sector followed by cotton. Fertilisers are widely used by most maize growers in this province. The Mission estimated that yields are likely to be around or slightly lower than last year. However, the outcome varies greatly from area to area. The estimated total production by the smallholder sector is 247 980 tonnes from a total area of 140 175 hectares under maize from both sectors (Table 3). This province is estimated to produce about 17 percent of total national maize production this year and is the third largest maize producing province in the country.

4.3 Mashonaland East Province

Most areas of this province fall under agroecological region II and III. Maize is the major crop. About 20 percent early planted maize was affected at tasseling stage by a dry spell of about three weeks from late December to mid-January. Wilting was observed but the crops recovered after good rains in February and March and, overall, average yields are still expected from the maize crop. Rains that followed in February and March were heavy but similar to or lower than last year. Fertilisers are widely used by maize growers in this province although below the recommended rates. The Mission observed cobrot in maize in this province.

The estimated maize production by both sectors in 2000/01 crop season is 293 627 tonnes from a total area of 220 136 hectares (Table 3). This province is estimated to produce about 20 percent of total national maize production this year and is the second largest maize producing province in the country.

4.4 Masvingo Province

Most areas in this province fall under agroecological region V (extensive farming) and III (semi-intensive farming). Maize is the major crop followed by sorghum, pearl millet, groundnuts and cotton. Rainfall was erratic and generally below normal and late in starting in most districts of the province. Cereal crop plantings stretched from November 2000 to January 2001. The January 2001 mid-season dry spell of more than 30 days in most of the districts affected early-planted crops, with maize most severely affected. The excessive rains during the months of February and March 2001 in most of the districts caused water logging, thus further reducing the potential yields. Fertilisers are used by a very small percentage of farmers and at much below the recommended rates. However, cattle manure is widely used. The estimated production of maize in this province in 2000/01 crop season is 114 244 tonnes from a total area of 170 270 hectares (Table 3). This province is estimated to produce about 8 percent of total national maize production this year and is the fifth largest maize producing province in the country.

4.5 Manicaland Province

Most maize growing areas in this province come under agroecological regions I, III and V. Maize is the major crop followed by cotton, sorghum and pearl millet. This year the crop season in Manicaland

Province was quite different from the previous season. Rainfall was erratic, generally below normal and late in most districts (except in Makoni and Nyanga districts). Cereal crop plantings stretched from mid-November 2000 to mid-January 2001. The January 2001 mid-season dry spell of more than 30 days in most districts affected most of the early-planted crops. Maize was affected more severely. The excessive rains during February and March 2001 caused water logging, further reducing potential yields.

Fertilisers are used by a very small percentage of farmers and at much below the recommended rates. However, cattle manure is widely used. The estimated production in 2000/01 crop season is 176 919 tonnes from a total area of 158 628 hectares (Table 3). The estimated maize production is about 12 percent of the total national maize production.

4.6 Matebelaland North Province

Most crop growing areas in this province come under agroecological region IV (semi-extensive farming). Maize is the major crop followed by sorghum, pearl millet and groundnuts. The temporal rain distribution was not normal, as it was erratic. Cereal crop plantings stretched from mid-November 2000 to early December 2000. The mid-December to end of January 2001 dry spell of more than 50 days in most of the districts affected early-planted crops, especially maize. The excessive rains during February and March 2001 in most of the districts caused water logging, thus further reducing potential yields. Fertiliser is not used by most farmers in this province due to very low rainfall and dry conditions. However, cattle manure is widely used. The estimated production of maize in 2000/01 crop season is 65 052 tonnes from a total area of 90 076 hectares (Table 3). Maize production from this province is a very small proportion (4 percent) of total national maize production this year.

4.7 Matebelaland South Province:

Most maize producing areas of this province come under agroecological region IV (semi-extensive farming). Maize is the major crop in this province followed by pearl millet, sorghum and groundnuts. The rainy season started late and rainfall was below normal in most districts. Cereal crop plantings stretched from November 2000 to February 2001. The long dry spell from mid-December to late January of more than 40 days in most of the districts affected most of the early-planted crops, particularly maize. The excessive rains in February and March caused water logging, thus further reducing the potential yields. Fertiliser is not used by most farmers in this province due to very low rainfall and dry conditions. However, cattle manure is widely used. The estimated maize production from this province in 2000/01 crop season is 10 034 tonnes from a total area of 35 513 hectares (Table 3). This is the lowest maize producing province in the country.

4.8 Midlands Province

Most crop growing areas in this province fall under agroecological region III (semi-intensive farming). Maize is the major crop followed by groundnuts and cotton. The rainy season in most areas started early at the end of October 2000, but a long dry spell from mid-January to the end of February followed by incessant and excessive rainfall from end February to end March affected 40 to 45 percent of the early planted maize, sorghum, millets and other crops. Consequently, the yield of the maize crop is expected to be reduced by 50 percent compared to the previous season. During the 2000/01 crop season there was a 10 percent reduction in the area planted to maize compared to last year due to a shortage of draught power. However, the area under cotton and groundnuts increased due to the COTTCO credit scheme. Most farmers do not use fertiliser, but rely on cattle manure. The estimated maize production in 2000/01 crop season from this province is 83 679 tonnes from a total area of 209 348 hectares. The estimated maize production is 6 percent of the total national maize production this year.

5. FOOD SUPPLY AND DEMAND IN 2001

5.1 Cereal market and prices

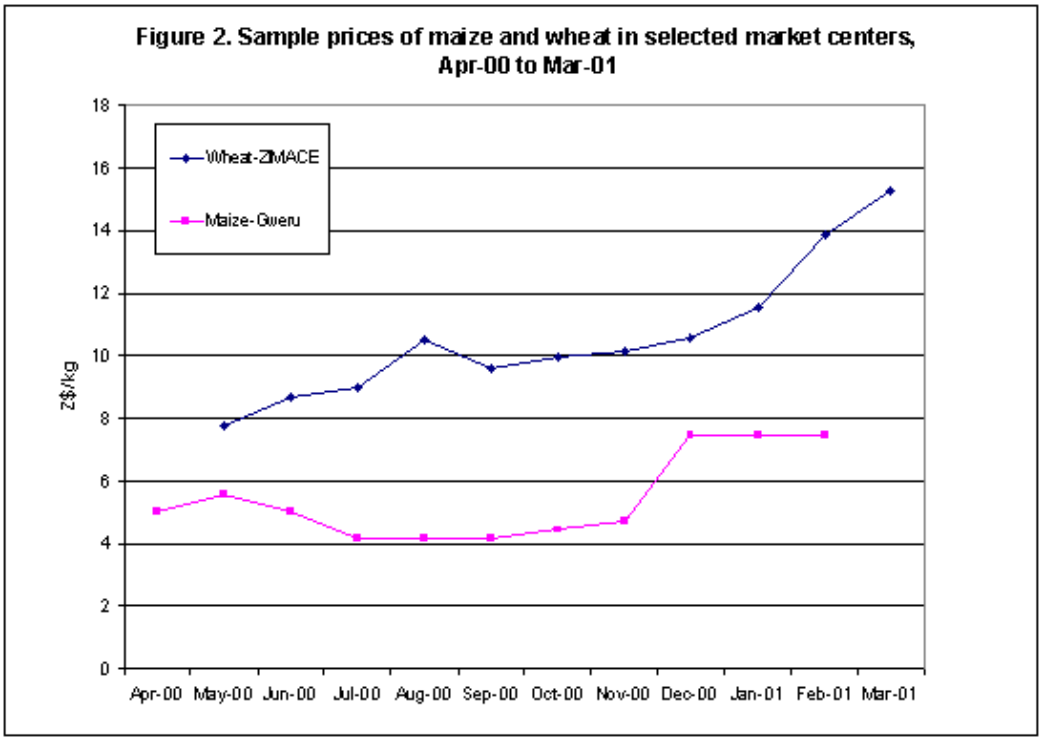
Following the harvest in May 2000 the prices of maize, the main cereal in Zimbabwe diet, decreased as expected and stayed almost constant until November 2000 (Figure 3). With the relatively poor harvest of winter wheat and unfavourable rainfall conditions for main season mainly in the south, prices of maize began to rise from November 2000 and peaked in December in Harare and Gweru urban centres. Given that the rate of consumer price inflation was around 58 percent annually, these maize prices have actually decreased in real terms over Mar-00 to Feb-01 period. The food price inflation in recent months has been lower than the general inflation and also the rate has been declining since September 2000. This masks the existence of food deficient communities due to drought/flooding this year and the impact of cyclone Eline last year. Particularly vulnerable are the food insecure areas in the east and the chronically food deficit areas of the south. Declining real per capita incomes, increased unemployment and the rising cost of food and non-food items, point to a serious problem of food accessibility by vulnerable groups of the population, particularly in urban areas.

It should also be noted that maize prices in Zimbabwe are set by the Grain Marketing Board (GMB), a state parastatal through its fixed purchasing price and a fixed selling price. Typically traders buy maize from GMB and sell it in food deficit areas by adding transportation and marketing costs/margins to the purchase price. Therefore, these prices may not reflect the true free market prices. GMB also maintains a monopoly over the imports and exports of maize. These state controlled operations in agricultural marketing cost substantial amounts to the Government (for example, GMB is indebted to a level of Z$ 10 billion) and cause severe economic and trade distortions and economic inefficiencies as pointed out by a multitude of studies around the world. As evidenced from the cropping pattern changes over time, Zimbabwe farmers are adjusting by switching away from maize to other cash crops such as soybeans, sunflower, groundnut, and paprika.

5.2 Cereal supply/demand balance, 2001/02

Accurate estimates of the **population** of Zimbabwe are difficult to obtain. Many agencies, such as the Central Statistical Office, UNFPA, US Bureau of the Census, NEWU and FEWS, all have their own estimates based on different growth rates. Growth rates vary from 0 to 2.5 percent depending on the assumptions about the impact of AIDS. The mission decided to use the NEWU estimate of 12 695 758 for mid-marketing year (Apr-01 to Mar-02). It is based on the assumption of 2.5 percent growth rate until 2000 and 0 percent for the current year.

Figure 2. Sample prices of maize and wheat in selected market centers, Apr-00 to Mar-01



The 2001/02 marketing year (April-March) projected balance for major cereal grains is summarised in Table 4, using the latest information on trade, pre-harvest stocks, and the final estimates of

production from the 2000/01 main cropping season and preliminary forecast for the upcoming second (winter) cropping season.

Total cereal grain **production** available in 2001/02 is estimated at 1.82 million tonnes, including 1.47 million tonnes of maize from the main season, as well as a provisional forecast of 250 000 tonnes of wheat production for the secondary winter crop, to be harvested during November-December of 2001. The total opening stocks (1 April 2001) of maize with GMB, the private traders and farmers are estimated at 561 000 tonnes.

On the demand side, the major part of the total grain utilisation is **food consumption**. Total food use is based on the projected 2001/02 mid-year population figure of 12.696 million and a per capita cereal consumption of 162 kg per annum, about the same level as the average of last five years. This consumption level includes 120 kg of maize, 28 kg of wheat, 13 kg of millets and 1 kg of rice. At 162 kg per capita, about 85 percent of the calorie needs would be met by cereals, the remainder being covered by other foods such as groundnuts, soybeans, meat, pumpkins, fruits and vegetables. Mopane worms (caterpillars) are also consumed as a supplement or are exported to Botswana, South Africa and Zambia to earn additional incomes. On the above basis, total grain consumption for year 2001/02 is estimated at 2.06 million tonnes.

Table 4: Zimbabwe: Cereal Supply/Demand Balance, April 2001-March 2002 (000 tonnes) a/

	Maize	Millets	Wheat	Rice	All Cereals
A. Domestic Availability	**1 887**	**109**	**384**	**1.5**	**2 381**
Opening Stocks	420	5	134	1.5	561
Production	1 467	104	250	-	1 821
B. Utilization	**2 334**	**109**	**505**	**13**	**2 961**
Food use	1 523	165	355	13	2 057
Feed use	250	-	-	-	250
Seed use and losses	76	8	10	-	94
Cross Commodity Substitution	64	(64)			-
Closing stocks	420	0	140	0	560
C. Import Requirements	**447**		**121**	**11**	**579**
Anticipated Commercial Imports	-	-	121	11	132
Deficit	447	-	-	-	447

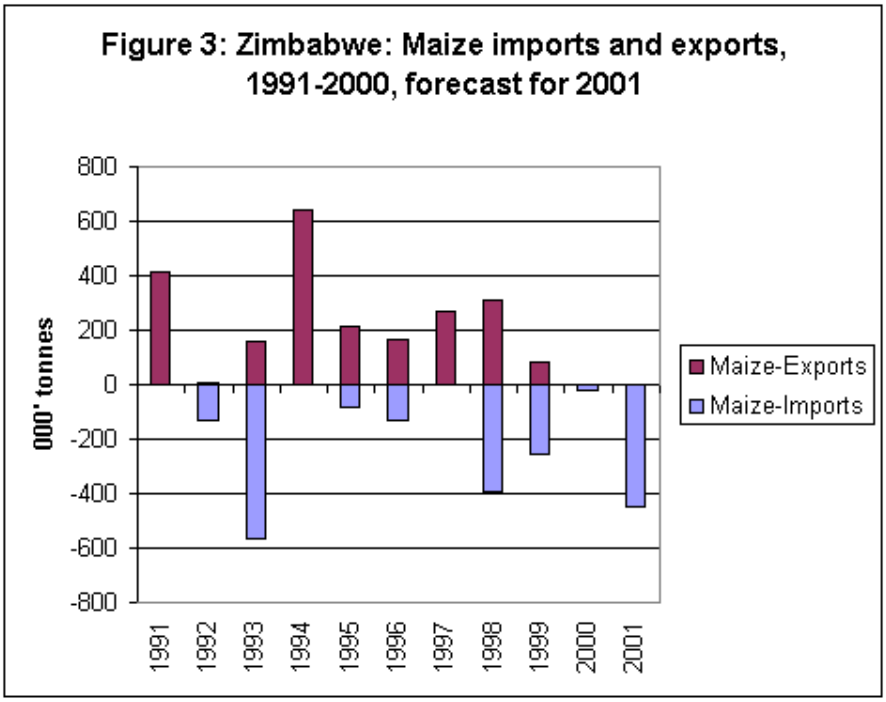
a/ Barley production of about 25 000 tonnes is not included in this food balance sheet since most of it is used for brewing purposes.

The use of cereals and cereal by-products as **animal feed** is expected to decrease this year compared to the last due to reduced livestock numbers especially in the commercial farming sector on account of re-settlement related disturbances. Some farmers have also stopped feeding the maintenance grain supplement to beef cattle during winter months. Wet weather in February-March also reduced calving percentage. Total feed use is estimated at 250 000 tonnes of grain. The feed use calculations are based on the information that about 500 000 tonnes of commercial feed with 30 percent maize grain content is sold annually and an additional 100 000 tonnes of maize is used in home-mixed feeds and on-farm grain feeding.

Other uses and losses include seed use of maize grain (not counting the hybrid maize seed usage; seed industry is treated separately). Seed use calculations are based on the seed rates of 25, 100 and 10 kg/ha for maize, wheat and millets respectively applied to the area planted under each of the crop.

Open pollinated maize is cultivated by about 10 percent of the communal farms. Due to relatively good storage conditions, the on farm losses were found to be minimal in Zimbabwe. For lack of precise data, these are assumed to be about 5 percent of total production for maize and millets and 2 percent for wheat.

Zimbabwe has maintained high levels of official **stocks** during the surplus years (e.g. 320 000 tonnes in 1996-97) and low levels of stocks (e.g. 97 000 tonnes in 1995-96) during low production or deficit years. Over the last six years (1994-95 to 2000/01), for maize the average level of 442 000 tonnes of official stocks and additional 123 000 tonnes of private stocks were maintained. Government's stated policy is to maintain a Strategic Grain Reserve level of 500 000 tonnes. Given the current socio-economic environment, and continual economic decline eroding purchasing power of the population, a relatively high level of stocks should be maintained. This will help avoid price escalations and maintain food security through price stabilisation in the country. Therefore, in this balance sheet the overall stock level is maintained unaltered by setting total grain stocks at 560 000 tonnes (i.e. 420 000 tonnes of maize and 140 000 tonnes of wheat).



Source: GMB, Zimbabwe; 2000 from MLARR and 2001 forecast by the Mission.

Based on the above mentioned assumptions, the total **import requirements** i.e. the gap between total annual requirements and total availability for all grains is estimated at 579 000 tonnes. Given the substantial decline in gold production, a 20 percent decline in the tobacco harvest, and much of the expected foreign currency earnings pre-committed for fuel, other energy imports, and the international debt service, the Government's ability to import maize is extremely limited. In 5 of the past 10 years Zimbabwe has been a net exporter of maize and 5 out of 10 years a net importer (Figure 3). The exports were as high as 640 000 tonnes in 1994 and the imports as high as 569 000 tonnes in 1993. The country generally has a deficit in wheat with an average net import level of about 75 000 tonnes per year during last six years (1994/95 to 2000/01). Wheat and rice markets are liberalised. Over the last six year period wheat imports have ranged from 30 000 tonnes to 159 000 tonnes, with the average annual imports at 87 000 tonnes. Thus, it is possible that much of the required wheat and rice can be imported by private traders provided they are able to raise foreign currency.

Considering the disappointing maize season in the region, cross-border trade is likely to be minimal. Thus, an uncovered import gap of about 447 000 tonnes of maize remains which could also be covered by commercial imports with the involvement of the private sector and/or by drawing down on the stocks. Given the fuel shortages and other transportation difficulties a major draw down of stock may not be advisable under the current climate of food insecurity in several parts of the country. Bilateral programme food aid to meet part of the import requirement could be considered as an option.

6. FOOD SECURITY AND VULNERABILITY ASSESSMENT

Several factors could affect the country's food security outlook. Food insecurity difficulties are expected to arise as a result of reduced food supplies due to poor harvest, rising food prices and declining purchasing power of certain sections of the population. It is therefore crucial to ensure adequate and affordable domestic supply in all regions of the country, as a pre-condition for food security. However, given the current economic situation in Zimbabwe, unemployment and underemployment in different economic sectors -primarily commercial agriculture, manufacturing, mining, tourism, and agro-industry- are likely to further erode buying capacity and access to food. With a serious fuel crisis facing the country, problems of distribution of grain from surplus to deficit areas could create food shortages.

The exclusion of some population groups from resettlement programmes and other social assistance schemes (such as immigrant commercial farm workers and mine workers) is likely to expose them to a high risk of food insecurity. Further, decreasing availability of -and access to- health services and social welfare schemes will put additional strain on the most vulnerable population groups such as the elderly, destitute, orphans, disabled, chronically ill, and many female headed households. Also, the incidence of HIV/AIDS on the expenditure pattern and income generation undermines food security of affected households and communities.

6.1 Vulnerability among farming communities

Over the last two cropping seasons, many areas of southern and eastern Zimbabwe were affected by Cyclone Eline (1999/00) and by erratic rainfall in 2000/01. These two events generated cumulative negative effects on food crop production and coping capacity. Combined with the overall economic slow down and poor budgets for state assistance and rehabilitation of productive and civil infrastructure, even the normally near self-sufficient farming households are exposed to the risk of becoming food insecure. In marginal maize growing areas -i.e. most of the southern and south-eastern areas there has been a reduction in harvest due to limited manpower and lack of access to draught power and technology packages promoted by agricultural extension -such as hybrid seeds, fertilisers and pesticides.

Households facing food insecurity over the coming year are the ones whose food economy is particularly fragile. These include those who have no sustained remittances, own no livestock, cannot afford modern agricultural packages and have a poorly diversified livelihood. Most of the conventional vulnerable groups such as the elderly, disabled, chronically ill, orphans, poor women headed household, destitute, fall in this category.

Food insecure households will to a limited extent depend on social welfare schemes operated by the Government, various charities, churches and NGOs. Importantly, it is estimated that traditional social solidarity networks in most areas can still support the currently food insecure households through hired labour, gifts and, to a lesser extent, saving schemes and plots cultivated by the community for the benefit of those who cannot engage in farming. However, the viability of the social coping capacity might be severely affected by the overall general economic decline.

6.2 Vulnerability among non-farming communities

In non-farming communities, job and income security is increasingly jeopardised by retrenchment and underemployment in the mining industry, commercial farming and agro-industry, with negative repercussions on the service sector. Rural-urban food flows are also changing direction to some extent in response to changes in relative food availability, prices and individuals' income level. Urban and peri-urban agriculture may offer some relief, but an enabling policy environment has to be created.

6.3. Strategies for possible food assistance

Over the last two years there has been a drastic reduction in number and magnitude of available development intervention activities. In response to the recent climatic vagaries the Government and

aid agencies provide limited support to relief and rehabilitation, such as child supplementary feeding, food for work and irrigation scheme rehabilitation. However, these programmes are inadequate to tackle the magnitude of the current and anticipated problems. In the event of a further deterioration in the security situation of the country, the aid delivery capacity, social networks and coping capacity will be under severe pressure before the new harvest in March 2002.

General free food aid distribution is seen, both at central and local levels, as detrimental to the self-reliance and empowerment of the communities. While food aid for existing well targeted and managed relief and rehabilitation schemes should receive sufficient funding, if food aid were to be required on any larger scale it should be in the form of bilateral programme food aid.

Contingency plans that identify the most vulnerable and food insecure segments of the population, as well as the most appropriate response package and timing of the necessary operational and resourcing needs, should be defined as soon as possible in view of the current difficulties relating to: (a) security obstacles to delivery mechanisms for aid aimed at poverty alleviation and disaster prevention/mitigation, (b) inadequate assistance and social welfare support by the Government and international aid agencies, and (c) seriously reduced maize import capacity of the Government due to foreign exchange constraints and the general economic decline.

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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Back to menu

1 The contents of this section is based on variety of sources including the publications of the IMF, World Bank, FAO, UNDP, FEWS-NET, US Bureau of the Census, and the Economist Intelligence Unit.

2 Human Development Report of UNDP for 2000 based on 1998 year data.

3 Source of information presented in this paragraph is the Ministry of Lands, Agriculture and Rural Resettlement.