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Zimbabwe Market Study: Manicaland Province Report

Dominica Chingarande, Gift Mugano, Godfrey Chagwiza, Mabel Hungwe

Acknowledgments

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Executive Summary

This report presents the findings of a market study conducted in July 2019 in Manicaland Province using both qualitative and quantitative methods. Study findings will be used to inform the strategic direction of the USAID's Office of Food for Peace (FFP) in Zimbabwe. A wide range of actors was interviewed, including government departments, non-governmental organizations (NGOs), traders, retailers, wholesalers, transporters, financial service organizations, and beneficiaries of food assistance. The market study aims to achieve a greater understanding of how markets work in the context of Manicaland Province, their structures (physical and nonphysical), dynamics, and social outcomes. A central aspect of the analysis is to understand how and in what ways markets are organized in Manicaland Province. This study identifies the risks and opportunities in order to inform programming and strategies in market determinants, constraints, and impacts on the achievement of outcomes in human development that are influenced by the agriculture and food security sectors.

Market Context

Maize by far is the most consumed cereal in Manicaland Province. In the same vein, pulses such as groundnuts, cowpeas, sugar beans, and round nuts are widely consumed in the province. Kapenta fish, other fish chunks, and mopani worms are the major source of protein, followed by chickens and goat. Manicaland is structurally food deficit. Mutare town is an important reference market for bulking/aggregation and distribution for the province. Reference markets located in the district administrative centers and along major roads are well integrated while markets in physically isolated rural areas are less integrated, especially during the rainy season, a situation that causes households to walk an average of 15 km (three hours on foot) to the nearby food distribution points. The assessment shows that five- to ten-ton trucks are used to distribute maize in these areas instead of 30-ton trucks. Notable constraints affecting traders *inter alia* include volatile economic environment, which is characterized by chronic inflation, poor access to finance and availability of commodities in the source markets, exchange rate spikes, and shortages of key utilities such as water, electricity, and fuel.

The structure, conduct, and performance (SCP) of markets varies across commodities. Maize, small grains (sorghum and millet), and pulses are supplied through local production across Manicaland, but in isolated cases the province is supplemented through inflows from surplus-producing areas of Mashonaland Central, Mashonaland East, and Mashonaland West (all provinces of Zimbabwe), as well as imports from Zambia, Malawi, and Latin America (Brazil and Mexico). The Grain Marketing Board (GMB) buys and sells maize and small grains at controlled prices, as stipulated in Statutory Instrument 145 of 2019 (Grain Marketing Control of Sale of Maize Regulations, 2019), which bans the buying and selling of maize among unauthorized persons in Zimbabwe. According to the Statutory Instrument, "No person or statutory body or company or entity shall buy or otherwise acquire any maize from any farmer or producer otherwise than through the Grain Marketing Board." Pulses prices are determined by source market prices: that is, Manicaland Province and regional countries such as Zambia and Malawi, and local supply/demand dynamics. Refined edible oil is produced locally in Harare, Mutare, and Bulawayo and is distributed through a network of wholesalers, supermarket chain, retailers, small shops (tuckshops), and vendors. In some districts close to Mozambique, such as Chimanimani and Chipinge, edible oil is imported informally from Mozambique (through Forbs and Cashel Valley borders) and is reasonably priced. Production of sorghum, millet, and maize, although substantially produced, could be

considered as a non-tradable commodity in Manicaland as very little reaches the markets due to the ban on the trading of maize, in particular.

Kapenta fish and mopani worms are largely traded in Manicaland and are often purchased by poor households. This assessment established that Chimanimani is in deficit in goats and cattle, while Buhera is a surplus-producing district. However, because of the zoning policy, cattle and goats are only traded in respective districts. Goats and chicken ownership are common among the poor, while ownership of cattle is prevalent among the rich. Household meat purchases are limited due to constrained demand and peaks during important events, such as the festive season. Because of price controls on grain, prices of maize, sorghum, and millet exhibit low degree of intra-annual price variation.

Food Assistance Modalities in Manicaland Province

The province had several food assistance programs implemented by the Department of Social Services, international donors, local NGOs, INGOs, and UN agencies. These agencies use different approaches including social protection, resilience building, emergency recovery, and long-term development initiatives to promote food security. The modalities used include in-kind, cash/food for assets, cash transfers, and vouchers. The table below shows the pros and cons of each modality in the province.

Table 1. Food Assistance Modalities

Modality	Pros	Cons
In-kind	Ration addressing nutritional needs of the community; used for intended purpose	Ration dilution; insufficient quantities; delivery of less preferred commodities; poor roads and related travel costs; decanting; thefts; milling costs; no support for other needs; procurement-related challenges including policy related and physical
Cash transfers	Flexibility on how to use the money; protecting rights of privacy and dignity of beneficiaries	Cash challenges; high charges; GBV, use of the money on unintended things; lack of supporting infrastructure (e.g., financial service providers, network, electricity); inclusion of non-deserving households
Vouchers	Used for intended purpose; promotes behavior change	Selected traders inflating prices and bringing substandard items
Food/Cash For Assets	Community infrastructure development; promotion of resilience through assets and skills development; a sustainable approach to promoting food security; excludes/isolates non-deserving community members; promotes behavior change	Stigmatization of participating households

Infrastructure

The central core of infrastructure for development is the road network backed by railway systems that go all the way to Beira in Mozambique. The trunk road infrastructure has improved with the rehabilitation of the Harare-to-Mutare road. The road network that spreads to Masvingo and the tourist area of Nyanga—and much of the internal road system connecting the districts—is tarred, yet it still requires rehabilitation, reflecting the depressed economic activities in many of the districts. Cyclone Idai badly affected many of the roads in the Chipinge and Chimanimani districts. Improving rural accessibility for productive road networks could increase the amount of food assistance and trade. The gateway to Beira, Mozambique, through Forbes Border Post provides an important infrastructural resource to potentially boost the economy of the province. Due to the poor road conditions in some areas, it is important to explore greater complementarity between cash and in-kind assistance and consider a mix of cash and food where appropriate.

The province has good communication system, with almost 90 percent phone coverage by all networks (NetOne, Econet, and Telecel). Cell phones are the primary form of communication, but challenges arise in the remote parts of some rural districts where cell network coverage is not sufficient. There are a number of financial service providers in the provincial town in Mutare and also at district centers. These include banks and agents for mobile money transfer.

The energy infrastructure exists through the national grid system owned and run by the Zimbabwe Electricity Supply Company (ZESA). This grid was set up in the 1950s and is now outdated. However, Manicaland has seen more Independent Power Producers (IPPs) setting up mini-hydro-power stations by partners such as Practical Action than any other province, simply because of the existence of waterfalls that are ideal for hydro-power generation. The Gairezi power plant and the Chisumbanje ethanol plant also exist. However, because origin is not a factor in where energy goes, the province still faces challenges of inadequate power generation, outdated energy infrastructure, and financial constraints to importing, leading to frequent power cuts and thereby affecting the competitiveness and resilience of the economy. In 2014, Manicaland nationally had the highest proportion of households without access to electricity (19 percent).

Zimbabwe is a landlocked country and does not have any ports. The two most common ports used are the Port of Beira in Mozambique and the Port of Durban in South Africa. Donors use both to receive food assistance, with port choice usually determined by cost and the destination province. Manicaland Province mostly receives food through the Port of Beira and, occasionally, from Masvingo province. Durban in South Africa is the currently recommended port for food assistance because the ocean freight there is generally less expensive than to Beira. There is occasional use of the Port of Maputo in Mozambique, but this cargo can only be viably transported to Zimbabwe by rail, limiting its usefulness. There are sufficient, accessible, and safe storage facilities in the province for both food and non-food items.

Directors of humanitarian agencies interviewed reported that storage facilities are available and adequate for both food and non-food items used in the development and rebuilding of communities. Major humanitarian organizations in Zimbabwe, including United Nations (UN) and local and international NGOs, lease or hire out warehouses from commercial service providers. This is a standard practice in Zimbabwe for both humanitarian and commercial actors on the market. Adequacy, accessibility, and availability of ancillary services is not a challenge in Manicaland Province. The World

Food Program (WFP) Zimbabwe operation has a 3,000 metric ton (MT) warehouse in Manicaland Province. Use of mobile storage facilities is also common among the NGO, UN, and international organizations operating in the province. According to NGO representatives interviewed, collaboration and space sharing have become common with humanitarian actors, causing organizations to save money. It is important to note that most agencies now prefer direct deliveries, where the food is delivered and distributed on the same day, thereby doing away with the need for storage facilities.

Policy changes and inconsistent implementation of such present serious challenges for programming. Humanitarian work in a highly dynamic context such as Zimbabwe requires multi-disciplinary teams that conduct ongoing risk analysis in changing context, liquidity monitoring, market monitoring, using comprehensive accountability systems including consulting leaders, contingency plans with service providers if there are challenges, using gender and accountability focal points, and seasonal top-up grants. Work with beneficiaries should include increasing beneficiary education and communication (and the time and resources it takes for this education) and regular meetings with communities to verify receipt and resolve problems (Tango, 2018).

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List of Acronyms

AGRITEX	Agricultural Technical and Extension Services
CNFA	Cultivating New Frontiers in Agriculture
CSB	Corn Soya Blend
DFID	Department for International Development
DFSA	Development Food Security Assistance
ENSURE	Enhancing Nutrition, Stepping Up Resilience and Enterprise
EU	European Union
FAO	Food and Agriculture Organization
FFA	Food for Assets
FFP	Food for Peace
FGD	Focus Group Discussion
GBV	Gender-based Violence
GMB	Grain Marketing Board
GMO	Genetically Modified Organisms
GoZ	Government of Zimbabwe
HCT	Humanitarian Country Team
ICT	Information and Communications Technology
LSA	Lean Season Assistance
MT	Metric Ton
MLAWCRR	Ministry of Land, Agriculture, Water, Climate and Rural Resettlement
NGO	Non-governmental Organization
ORAP	Organization of Rural Associations for Progress
SAFIRE	Southern Alliance for Indigenous Resources
UN	United Nations
UNDP	United Nations Development Program
WFP	World Food Program
WHO	World Health Organization
WV	World Vision
ZESA	Zimbabwe Electricity Supply Authority

I. Introduction

The purpose of this market analysis report is to provide findings of a market analysis conducted in Manicaland Province in July 2019. The study used secondary data as well as primary data collected using qualitative and quantitative methods from a wide range of actors, including government departments, NGOs, traders, retailers, wholesalers, transporters, financial service organizations, and male and female beneficiaries of food assistance in selected districts of Buhera, Chimanimani, and Makoni (see Annex I for the study methodology). The purpose of the study was to inform the strategic direction of the USAID’s Office of Food for Peace (FFP) in Zimbabwe. The market study focused on greater understanding of how markets work in the context of Manicaland—how the political economy influences the evolution of markets, the structures (physical and nonphysical), dynamics, and livelihoods context outcome. A central aspect of the analysis is to understand how and in what ways markets are organized in Manicaland Province. Through this study, we identify the risks and opportunities to better inform programming and strategies for market determinants, constraints, and impacts on the achievement of outcomes in human development influenced by the agriculture and food security sectors.

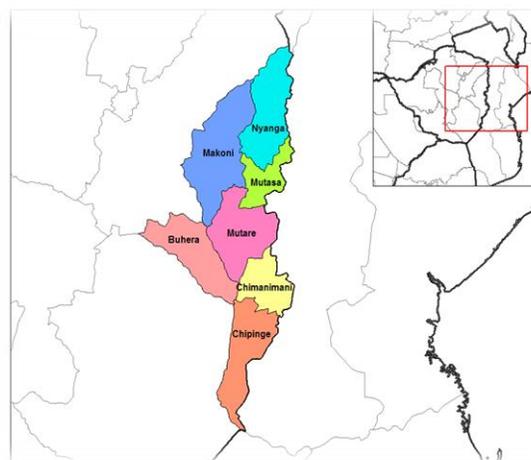
Manicaland has a versatile economy, producing more than 70 percent of Zimbabwe’s diamond quantum in addition to a principally agricultural production, especially fruits (bananas, peaches, mangoes, apples, lychee, and avocado), macadamia nuts, Irish potatoes, tea and coffee, and timber). The mountain—with its associated tourism thanks to the spectacular views—and the fertile lands and the Port of Beira, Mozambique, all contribute to the total value of production of over \$1 billion annually. Details of the Port of Beira will be provided in the following sections. The investment in ethanol in Chipinge district along the Sabi River has been a significant economic milestone, given the labor absorption of the multiplier effects of producing ethanol. For the general methodology of how the provincial market study was undertaken, see Annex I.

Context and Situation in Manicaland

Physical and Natural Resources of the Province

Manicaland is found in the eastern side of Zimbabwe (see Figure 1) and is generally referred to as the Eastern Highlands, given the topography. It forms a barrier mountainous belt that influences the weather patterns, which also has an influence on a range of economic activities and the commercialization of parts of the province. The province is endowed with perennial rivers: the Odzi River stretches from Nyanga district through Mutasa and Mutare West districts and drains into the Save River, which borders Manicaland and Masvingo provinces to the south. Other perennial rivers include the Pungwe and Honde, which runs through Mutasa, Mpudzi, Muroti, Mukuni, and Sakubva in Mutare. A number of seasonal streams are also found in all three districts. The river systems

Figure 1. Districts of Manicaland



provide huge potential in economic development centered on river systems and dams. Major dams include the Osborne Dam (fourth-largest inland dam in Zimbabwe), which is found in Mutasa district. In Mutare district, the Mukwada, Marange II, and Mpudzi dams are key to agriculture and other commercial activities that influence the nature of the markets in the province.

The province serves as a strategic gateway to Mozambique. It has seven administrative districts—Buhera, Chimanimani, Chipinge, Makoni, Mutare, Mutasa, and Nyanga—and three urban areas with town status. The province has an area of 36,459 square kilometers, and the population density is 42 people per square kilometer (compared to a national average of 31 persons per square kilometer). The province spans all five natural regions. There is therefore a capacity for a range of agricultural activities from the high rainfall areas of Vumba Highlands in Region I to the dry and hot areas of Middle Save in Region V. The province has a wider range of resources because of its physical natural resources and locational advantages, being on the border with Mozambique and just 600 kilometers (kms) away from the port city of Beira and, therefore, the closest district to the Indian Ocean.

Economic Activities and Livelihoods

Manicaland Province is significant to Zimbabwe's economy. While in the past temperate agricultural conditions provided it with a vantage, today minerals (especially diamonds) have been significant in the development of markets, causing money to flow into the province. Manicaland Province is endowed with mineral, tourism, timber, and agricultural capital (including potato, banana, and apple production that are of national and international benefit in terms of products supply, income gains across value chains, economic multiplier effects and employment creation at all levels—district, province, national). Therefore, some of the economic benefits are situated at the individual and household level and others are at the level of state and society through organized services and support systems. The relationship between the diverse economic activities in the province is direct, with a series of intermediate factors and process factors key to understanding how these resources are shared and used at the provincial and national level. It is therefore important to understand how services and support systems in Manicaland not only relate to the local economy but also to the national and the intermediating political and policy factors in the distribution of benefits. The relationship between the two levels is the domain of how services and people's behavior impact the provincial economy, as well as central to influencing the types and structures of the markets in Manicaland.

Sociocultural Context

Manicaland Province is largely patriarchal. The major ethnic groups are the Manyika and the Ndaue people whose belief systems are the same regarding the position of women and young people in the household and society at large. Focus group discussions (FGDs) with both men and women revealed that since men are the heads of households, they have a final say on major decisions. However, the household decision-making process has slowly shifted toward becoming consultative and consensual. Joint decision-making is now common in households, although women cannot make independent decisions on some issues, such as a sale of cattle when the husband is away. Women are involved in household budgeting and, in some cases, are responsible for keeping household money and purchasing of household groceries from markets.

Women are usually given leeway to make income use decisions when the income source is “women's projects” or is very small. Decisions on relatively large incomes realized from the sale of livestock or

The central core of infrastructure for development is the road network (backed by railway systems) that goes all the way to Beira in Mozambique. The Beira fuel pipeline passes through Manicaland en route to Harare. This is in addition to the newly developed airstrip particularly established as a security measure for the transportation of diamonds and that is not of benefit to the public. The trunk road infrastructure has improved with the rehabilitation of the Harare-to-Mutare road, which started during the inclusive government, Zimbabwe's coalition government formed in February 2009 between the three major political parties: Zimbabwe African National Union Patriotic Front (ZANU PF), Morgan Tsvangirai's Movement for Democratic Change, and Arthur Mutambara's Movement for Democratic Change. The inclusive government ended in June 2013.

The road network that spreads to Masvingo and the tourist area of Nyanga, as well as much of the internal road system connecting the districts, are tarred yet require rehabilitation, reflecting the depressed economic activities in many of the districts. The gateway to Beira, Mozambique, through Forbes Border Post provides an important infrastructural resource to potentially boost the economy of the province.

Table 2. Manicaland Province Road Type and Network Length

Road Type	WMSS	WMGS	NM	GR	ER	Total
Network Length (km)	507.4	707.1	71.4	1,178	283.1	2,747

WMSS: Wide mat surfaced shoulders; WMGS: Wide mat gravel shoulders; NM: Narrow mat; GR: Gravel; ER: Earth.

Source: WFP, 2017.

In 2016, Manicaland Province had the following road statistics: 54 percent good tarmac roads, 7 percent good gravel roads, 14 percent dry-weather roads, and 2 percent strip roads (ZimVAC, 2016). Owing to the fact that 14 percent of the roads are dry-weather roads, during the rainy season, beneficiaries must travel long distances and incur significant costs to collect food. The poor state of roads (particularly feeder roads), fuel shortages, and high fuel prices have increased the costs of in-kind food assistance, resulting in agencies shifting from monthly to bimonthly food distributions.

Fuel prices in Mutare remained at a similar level to Harare fuel prices between January 2013 and May 2019. In June 2019, prices increased significantly in the country as Zimbabwe was facing a fuel shortage as well as a U.S. cash shortage (Figure 4 and Figure 5). Fuel purchases are only possible in Zimbabwean Dollars (ZWL).

The roads affected by Cyclone Idai in the districts of Chipinge and Chimanimani were inaccessible in July 2019 when the study was conducted (see Figure 3).

Figure 3. State of the road in Chimanimani



Source: Authors.

The situation in Chimanimani district was worse than in Chipinge. Development partners were busy repairing the roads before the inception of the rainy season. Improving rural accessibility for productive road networks could increase the amount of food assistance and trade.

Figure 4. Comparison of Fuel Price from 2013-February 2019

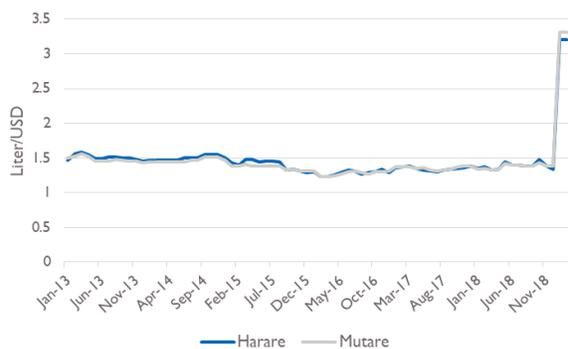
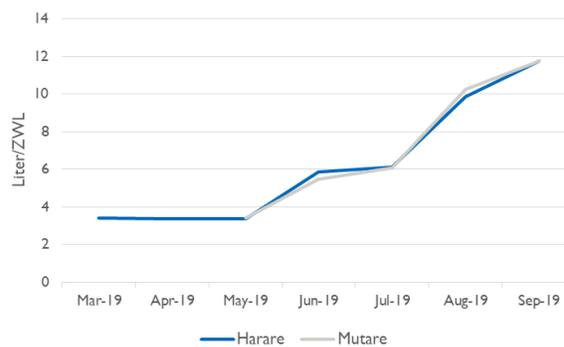


Figure 5. Comparison of Fuel Prices from March 2019- October 2019



Source: FEWS NET Price Data.

Information and Communications Technology (ICT) and Communication

Mobile phones have shown promising potential to effectively bring financial markets to the rural poor, allowing banks and other lenders in urban centers to provide services such as loans and saving accounts to a new population (Nicholson, 2007). Several agriculture entities trade on the mobile phone platforms exist, such as Eco-farmer, Ecocash, and One-wallet linked on the Zip-IT platform with most of the traditional banking institutions. This has brought smallholder farmers into the banking sector.

The province has a good communication system, with almost 100 percent coverage by all service networks in Zimbabwe. Although mobile phones for voice, email, money transfers, and texts—together with applications for market information-sharing—are available, they are extremely expensive and uncompetitive. Cell phones are the primary form of communication—although challenges arise in the remote parts of Buhera, Chipinge, and Chimanimani where cell network coverage is weak and service is not efficient.

With the rise of the cellphone, more households are connected to the Internet: 7.9 percent of households now have access to the Internet (ZIMSTAT, 2014). While there has been significant rollout of communications infrastructure, with 2G exceeding 75 percent population coverage, high-speed broadband coverage is still patchy, with most rural and remote areas remaining uncovered. Broadband coverage in rural and remote areas remains low. Coverage is mainly concentrated in affluent urban areas (GoZ, 2015).

The energy infrastructure exists through the national grid systems owned and run by the Zimbabwe Electricity Supply Company (ZESA). However, Manicaland has seen more independent power producers (IPPs) setting up mini-hydro-power stations by partners such as Practical Action—more than any other province, simply because the area’s waterfalls are ideal for hydro-power generation. For \$105 million, the Gairezi power plant has been established and delivers 30 megawatts (mw) of energy. The

Chisumbanje ethanol plant has been connected to the national grid and contributes 50 mw of energy from bagasse. This would be very significant if all the energy were prioritized for Manicaland. However, the power is shared nationally, which means “origin” is not a consideration for distribution. (This idea, however, is gaining prominence through the devolution agenda being promoted by the 2013 Constitution, which promotes a decentralized form of government.) For now, however, as of 2014, Manicaland had the highest proportion of households in the country without access to electricity (19 percent). Inadequate power generation, outdated energy infrastructure, and financial constraints to importing have led to frequent power cuts across the country.

Ports

Zimbabwe is a landlocked country and does not have any ports. The two most common ports used are Port of Beira in Mozambique and Port of Durban in South Africa. Donors have always used these ports to receive food assistance. Port choice is usually determined by cost and the province that the food assistance is earmarked for. Manicaland Province mostly receives food through the Port of Beira. However, NGO managers interviewed indicated that Durban is the currently recommended port to receive food assistance because the ocean freight to there is less expensive than the ocean freight to Beira. There is occasional use of the Port of Maputo in Mozambique, but this is limited because cargo then can only be viably be transported to Zimbabwe by rail, adding another layer of challenges and cost.

Storage Facilities

NGO managers interviewed in Manicaland Province revealed that storage facilities in the province are available and adequate for both food and non-food items used in the development and rebuilding of communities. These are found in the provincial city and at district level. Government has storage facilities managed by the Grain Marketing Board (GMB), with a total storage capacity of 4,902,700 MT across the country. GMB has a total of 89 depots across the country, an indication of its high storage capacity. Out of these, 12 locations have silos, 82 locations have cement floors where tents can be pitched up, and 24 locations have sheds or wooden structures to store grain. The shed and or wooden structures were noted as insecure because moisture can penetrate. In Manicaland Province, all the districts have GMB depots have storage facilities that can be used for storage of food.

Table 3. GMB Storage Facilities: Location and Carrying Capacity

Type	Number of Storage Structures	Carrying Capacity (in MT)
Silos	12	758,000
Hard Stands	82	3,974,000
Sheds/warehouses	24	170,700
Total	118	4,902,700

Source: WFP, 2017.

Additional commercial storage is available through GMS, with the details stated in Table 4. Major humanitarian organizations in Zimbabwe, including UN and local and international NGOs, lease or hire

out warehouses from commercial service providers. This is a standard practice in Zimbabwe for both humanitarian and commercial actors on the market. Adequacy, accessibility, and availability of ancillary services is not a challenge in Manicaland Province.

Table 4. Commercial Storage Facilities in Mutare

Location	Owner	Available to Rent	Capacity	Type	Access	Condition
Mutare	GMS	Yes	10,000 m ²	Indoor storage	Flat	Intact

Source: WFP, 2017.

The WFP Zimbabwe operation has a 3,000 MT warehouse in Manicaland Province. Use of mobile storage facilities is also common among the NGO, UN, and international organizations operating in the province, and this can be an option for districts that have no fixed storage facilities. According to NGO managers, collaboration and space-sharing have become common with humanitarian actors, which saves organizations engaged in such collaborations some money. It is important to note that most agencies now prefer direct deliveries where the food is delivered and distributed on the same day, thereby eliminating the need for storage facilities.

Financial Service Providers

In Mutare, there are 11 commercial branches, 2 building societies, 1 savings bank, and 1 development institution that are regulated by the Reserve Bank of Zimbabwe. The commercial bank sectors offer customers a variety of services, including mobile money options, savings and checking accounts, and financing loans. Business and corporate partners also have relationships with the sector to increase profitability. Merchant banks are not found in the province but are located in Zimbabwe’s capital, Harare. With respect to societies, mortgage borrowers, savers, and current account holders are “members” who vote on decisions that affect the society. Building societies do not need to pay dividends to shareholders, which enables them to offer better rates of interest on savings and mortgages. Development institutions help fund additional infrastructure (road, rail, aviation) programs in Zimbabwe.

In mobile money platforms such as Ecocash and One Wallet, mobile money operators have been accused of collaborating with banks by operating in busy markets such as Sakubva and Chipangano Markets in Mutare. Mobile agents charge between 40 percent and 60 percent of the amount of money being transacted, for cashing in and out operations. The rate changes according to the cash barons who are part of the system. With every transaction charge on money that is supposed to transact within the agriculture sector, funds are withdrawn from agriculture commodities and moved without being attached to commodities (E-Mkambo, 2019).

Most of the financial service providers operate from the provincial town, Mutare. However, Agribank—a loan-granting and a deposit-taking agriculture development financial institution, a primary vehicle through which the Government channels financial resources to the rural agriculture sector—is available in all the districts of the province. CABS bank has also established a network of agents across all the districts in Manicaland Province, providing the financial services needed by the rural population. Some

people are also using mobile banking services, such as Telecash and EcoCash, with an option to link the bank account to the mobile phone wallet.

Apart from the formal financial service providers are informal schemes such as the Village Savings and Loans groups, mostly introduced by NGOs to promote financial inclusion and women economic empowerment. These comprise of small groups of people, mostly women who save together and take small, low interest loans from those savings. In Manicaland Province, World Vision, through the ENSURE project promoted this model.

Table 5. Financial Service Providers in Manicaland Province

Commercial Banks	Building Societies	Savings Bank	Development Institutions	Mobile Banking Platforms
<ul style="list-style-type: none"> • Agriculture Development Bank of Zimbabwe • First Capital Bank Limited • CBZ Bank Limited • Ecobank Zimbabwe Limited • FBC Bank Limited • Nedbank Zimbabwe Limited • Metbank • NMB Bank Limited • Standard Chartered Bank • Stanbic Bank Zimbabwe Limited • Steward Bank Limited • ZB Bank Limited 	<ul style="list-style-type: none"> • CABS • FBC Building Society 	<ul style="list-style-type: none"> • People's Own Savings Bank 	<ul style="list-style-type: none"> • Small and Medium Enterprises Development Corporation 	<ul style="list-style-type: none"> • EcoCash • One wallet

Agriculture and Livelihoods in Manicaland Province

Agriculture remains a top economic activity in the province of Manicaland because the agro-ecological regions (I to V) provide opportunities for dry land farming, irrigated agriculture and greenhouse farming for horticultural crops, forest plantations, tea and coffee production, specialized dairy production, macadamia nuts, and kiwi fruit—all of which takes place in the province. In Manicaland, about 80 percent of the rural population resides in the drier NR II to V, whose agricultural performance yields results with adequate rainfall inflows that comes largely from the Save River catchment. Chipinge, Chimanimani, and Buhera districts fall in Natural regions III-V. These regions receive between 450 and 750 mm per annum. Natural region III is characterized by annual rainfall of 500-750 mm, mid-season dry spells and high temperatures. Production systems are based on drought-tolerant crops and semi-intensive livestock farm. Natural Region IV is characterized by annual rainfall of 450-650 mm, severe dry spells during the rainy season, and frequent seasonal droughts. Although, Natural Region IV is considered unsuitable for dryland cropping, smallholder farmers grow drought-tolerant varieties of

maize, sorghum, pearl millet (*mhunga*) and finger millet (*rapoko*). This region is ideally suitable for cattle production under extensive production systems and for wildlife production. Natural Region V receives rainfall less than 650 mm/year and highly erratic. It is suitable for extensive cattle production and game-ranching. Although both Natural regions IV and V are too dry for crop production, households still grow grain crops (maize and millet) for their food security. Crop yields are extremely low and the risk of crop failure is high in one out of three years (Rukuni and Eicher, 1994). Cattle and goat production are major sources of cash income.

The livelihood activities of those in NR II to V include seasonal jobs in the tea estates, forestry plantations, and horticulture production among others. This has been a lifeblood of the province; large investments are happening in Chipinge districts due to the harnessing of the water for sugarcane on currently close to 15,000 hectares (ha), which is feeding into the Chisumbanje ethanol plant. The province features many of what used to be the choice companies for employment Border Timbers, Cairns Foods, Tanganda Tea Company, Forestry Commission, Mutare Board & Paper Mills, Wattle Company, and Karina Textiles. This in addition to Quest Motors, Zimbabwe's second car assembly (after Willowvale Motor Industries of Zimbabwe), as well as Feruka Oil Refinery, the only oil refinery plant in Zimbabwe.

However, the plantation forestry in Zimbabwe is limited to the Eastern Highlands of the country, and covers about 120,000 ha in total, or 0.3 percent of the land area of the country. A large number of forestry-related economic activities have been created offering employment opportunities and income to many people in NR I. Four large companies, the Forestry Commission, Wattle Company, Rothmore Forests, and Border Timbers, own and operate large sawmills in the area, offering employment to thousands of people. Wattle Company Limited is the only producer of wattle extract in Zimbabwe and one of the eight producers in the world. The company is also the largest producer of gum poles in Zimbabwe and owns eucalyptus plantations in the Vumba region and Mutare district.

The variations of rainfall influenced by the extremes of the climates put Manicaland in the position of being a province with resource fortune, as well as one with distress. In Zimbabwe, Buhera district with dry-land agriculture production experiences deficits in food annually, which also is reflected by the fact that Manicaland is not considered a major grain production area except for subsistence. This provides a threat to a large population of the province, as they have to be centrally fed from the state as corporate markets are not involved in social redistributive programs that includes food provision.

Table 6 presents the production volume of different crops in the districts of Manicaland Province.

Table 6. Manicaland Province Crop Production Figures, 2019 (in Metric Tons)

District	Maize	Sorghum	Pearl Millet	Finger Millet	Groundnuts	Sunflower	Soyabean	Sugar Bean	Cowpeas
Buhera	15,746.0	4,263.3	8,155.0	1,388.0	443.2	92.8	11.0	96.5	877.2
Chimanimani	19,279.0	682.1	329.0	69.0	738.9	178.3	18.5	559.0	117.9
Chipinge	4,7048.0	7,844.4	841.0	144.0	586.0	102.2	0.5	460.6	653.8
Makoni	62,778.0	852.7	114.0	936.0	1,549.1	583.5	8.0	1,186.8	733.2
Mutare	2,8243.0	686.1	3,935.0	358.0	2,162.3	60.5	34.2	1,530.7	850.1
Mutasa	27,579.0	2,216.9	0.0	293.0	394.2	126.7	2.4	1,942.7	116.8
Nyanga	10,432.0	511.6	696.0	72.0	625.5	229.6	7.7	1,904.0	42.8
Total	211,105	17,057	14,070	3,260	6,499	1,373	82	7,680	3,392

Source: Ministry of Lands, Agriculture, Water, Climate and Rural Resettlement (2019)

The average yields per hectare in the province are indicated in Table 7.

Table 7. Manicaland Province Crop Production Yield Figures, 2019 (in Metric Tons)

Crops	Maize	Sorghum	Pearl Millet	Finger Millet	Groundnuts	Sunflower	Soyabean	Sugar bean	Cowpeas
Yield	0.82	0.573	0.378	0.35	0.511	0.466	0.933	0.591	0.334

Source: Ministry of Lands, Agriculture, Water, Climate and Rural Resettlement (2019)

Most farmers have given up farming because of the losses they incur every agricultural season. FGD participants noted a decrease in production, which was also confirmed by the production statistics that reveal, there has been a decrease in average household grain production since 2017, as indicated in Table 8 below.

Table 8. Average Household Cereal Production, Manicaland Province, 2017–2019

	Maize (kg)			Small Grains (kg)		
	2016/17	2017/18	2018/19	2016/17	2017/18	2018/19
Yield	335.1	274.3	164.6	30.9	11.1	11.5

Source: Ministry of Lands, Agriculture, Water, Climate and Rural Resettlement (2019)

The food deficit in Manicaland Province is due to various factors, including:

- El Niño–induced droughts, which have affected crops and caused death of livestock, especially cattle used as draught power

- Unaffordability of agricultural inputs for communal farmers
- Use of retained seed with reduced vigor
- Rising prices of basic goods
- Animal and crop diseases
- Effects of cyclones, which have affected production and yield levels, as well as access to and availability of food resulting in several households in need of food assistance (ZimVAC, 2019).

Owing to the low production levels, FGD participants revealed that crop yields for all commodities except small grains do not last for a year and the six months between October and March are the most difficult months for them in terms of access to food. As a result of the food gap, Manicaland Province has the highest prevalence rate of global acute malnutrition, severe acute malnutrition, stunting, and overweight in Zimbabwe. The global acute malnutrition rate is at 0.53 percent; the severe acute malnutrition rate is at 0.5 percent, stunting is 34.8 percent, and overweight is 4.5 percent (ZimVAC, 2019). Stakeholders revealed that most people in the province receive food assistance from the government and NGOs.

Poverty and Food Insecurity

The situation in the province has rendered some households poor. FGD participants indicated that that they measured poverty at the community level using a number of indicators as follows:

- Lack of access to food to feed the household
 - Children from that household are seen in the forests early in the morning looking for wild fruits and going to other people's homes just on time for meals
 - They are known for asking for food from neighbors and being unable to pay back
- No kraal or fowl run at poor people's homes because they have no livestock (both large and small stock, including chickens)
- Children not attending school
- Torn clothes without shoes
- Dilapidated houses and insufficient accommodation; household members of different sex sleep in one room and that one room serves multiple purposes
- Widows, orphans, elderly, disabled, and the chronically sick

These indicators mostly center on assets and access to basic needs, indicating less focus by community members on income-based poverty measures as well as demographic factors. Those identified as poor were also characterized by FGD participants as having low self-esteem, high levels of domestic violence, large families, laziness, and poor decision-making, especially when they get money. Men prioritize beer while women prioritize soft drinks. There is therefore a need to focus on provision of basic needs, psychological needs, and asset-building.

Households engage in consumption-based and non-consumption-based coping strategies, as described below:

Consumption-based Coping Strategies: When there is not enough food in the household, women give first preference to their husbands and children, sacrificing themselves, without men's knowledge. When the household does not have enough nutritious food for all household members, the husband is given priority over children and the wife. This, in turn, affects access to nutritious foods by both the children and the mother. The other consumption-based coping strategies cited during primary data collection include:

- Reduction of the number of meals eaten per day
- Reduction of portion sizes
- Some household members, mostly women, eating less than others
- Increased consumption of wild fruits
- Consumption of less preferred foods
- Borrowing food
- Consumption of leafy vegetables without *sadza* (maize flour porridge)
- No variety, as the few resources available are devoted toward procuring staples

Decision-making on consumption-based coping strategies are dominated by women, due to their reproductive role of food preparation. Time poverty and shortage of water and fuel wood as a result of climate change also influence women's decisions on the consumption-based coping strategies of what is prepared and how it is prepared. For example, preparing beans takes long, so it is less preferred due to time, water, and fuel wood poverty. (However, beans are also sometimes soaked overnight so that they do not take much time to cook.)

Non-consumption-based Coping Strategies: As households cope with food shortages, men and women prefer to take up tasks that are traditionally assigned to them. The following are the non-consumption-based coping strategies performed by both men and women in Manicaland Province, as described by GFD participants:

- Women sell small livestock
- Men sell large livestock. (Cattle are also sold within communities. However, animal diseases such as foot and mouth have affected zonal movement of cattle, including cattle sales; see Annex 2.)
- Reduction of the size of land under cultivation
- Cross-border trade
- Barter-trade of small grains for maize with people who need them for stock feed and/or for brewing traditional beer

On top of the above-cited coping strategies, men also do brick molding and house construction while women do small gardens and sell horticulture produce. It was generally believed that men's coping strategies bring in more income than women's.

Food Eaten in the Province

Food consumption within the province is generally dominated by the consumption of white maize, which constitutes the majority of household calories consumed. FGDs revealed that in Manicaland there is a perception that people have not eaten if they have not consumed *sadza*—that is, maize converted into mealie meal and then cooked to produce a dish called *sadza*. Households use grinding mills, which are conveniently located at local business centers to produce mealie meal. Milling has become expensive. In July 2019, milling was paid in cash or kind at the following costs: \$1 per 20-liter bucket of maize or a 5-liter tin of maize for a 20 kg bucket of maize. This pricing regime prevailed regardless of the fact that the Government of Zimbabwe banned the use of US dollars on June 24, 2019.

Small grains such as sorghum and millet are produced in districts such as Buhera and Chimanimani due to their drought-resistant nature and ability to grow in more marginal conditions but are then traded for maize. Sorghum and millet are nevertheless perceived as an inferior good in the province. Households reported consuming beans, groundnuts, round nuts, and cowpeas, in addition to other pulses, based on price and availability.

The assessment revealed that Kapenta fish is the most commonly purchased animal protein source, leaving purchases of chicken, goat, and beef for special occasions. In some rare cases, “small animals” (such as rabbit and mice) and edible insects (such as termites) are likewise consumed to varying degrees across the visited districts.

Households reported preferring high-quality refined edible oil such as locally produced brands Olivine Oil, Red Seal, Zimgold, Royal Oil, and Pure Drop, and South African brand D’Lite, which is imported informally from South Africa (see Annex 2).

Table 9. Commonly Consumed Foods in the Province

Commodity Category	Notable Trends
Maize	White maize is produced, purchased, and consumed across the province. In Manicaland, sorghum and millet is considered as inferior and is labor intensive in preparing it. Maize is only available at the GMB since the Government banned the trading of maize through a legislative framework of Statutory Instrument 145 of 2019.
Pulses	Groundnuts, round nuts, and cowpeas are consumed across the province, but dry beans are highly preferred.
Animal Protein	Kapenta fish are purchased across the province. Household consumption and purchase of livestock meat and products is limited/reserved for special occasions.
Edible Oil	Local edible oil (such as Olivine Oil, Red Seal, Zimgold, Royal Oil, and Pure Drop) are available across the country.

Crop, Livestock, and Production Resource Ownership Patterns

FGD participants in all the districts visited reported that in male-headed households, both men and women have access to resources of production, but men generally control certain resources—

particularly those that are regarded as belonging to them. Men in general are regarded highly as heads of households and breadwinners. As heads of households, men own high-value assets such as land and cattle. Land shortage was not cited as a challenge in Manicaland Province; however, the ownership patterns were generally in favor of men. Men own farming implements, and women, in most cases, cannot lend these in the absence of the man. Small livestock such as goats and chickens and kitchenware belong to women—hence oftentimes they have the flexibility to dispose of them without consulting men. The skewed asset ownership patterns in favor of men are despite Government policy on joint registration, through Statutory Instrument 53 and other constitutional provisions, particularly Section 3 of the 2013 Constitution on non-discrimination of women regarding ownership of assets and other aspects of life. Females are more disadvantaged than their male counterparts in terms of access to land, size of land, use of improved seed, and access to household tools and equipment; however, this does not affect the amount of investment that females commit to production. The skewed asset ownership pattern varies over the life cycle of both men and women, with younger men and women more disadvantaged than older men and women.

The concept of family ownership of resources and assets is increasingly common, replacing the concept of assets and resources labelled as owned by men. For example, maize and cattle in some cases were regarded as belonging to the family, while chicken and pulses still remain in the women's domain. Classification of crops as belonging to males or females was for purposes of ensuring that there is someone accountable for the crops.

2. Market Structure, Performance, and Conduct

Market Context Analysis

Manicaland Province is largely considered as food secure. This is thanks largely to the fact that most districts in the area fall under region 1 and 2, meaning they receive the highest rains and also have favorable temperatures. However, some districts, such as Buhera, Chimanimani, and Chipinge, are known to be food insecure, with the Chimanimani and Chipinge even worse off due to the devastating effects of Cyclone Idai. Nonetheless, the local marketing system is vibrant, with many markets and trading centers, and is responsive to actual and perceived market signals (see Annex 3). Manicaland Province broad marketing system is highly integrated with Harare markets and neighboring areas of Mozambique and South Africa—especially in the southern part of Manicaland. Price trends reflect the underlying marketing system structure and level of coordination, which are unique to each individual commodity market studied.

Supply Context

Given highly porous borders and strong market linkages, supplies and prices on markets are highly dependent on the broader national and regional context. Structural deficit status for most commodities within the province means that prices are heavily influenced by those in key source markets within the

area, in parts of Manicaland, and in neighboring areas of South Africa, respectively and by transportation costs.

There are a variety of markets for various commodities, and the commodities vary in terms of how they form, depending on the nature of the demand and the quality of the produce.

Table 10. Types of Commodity Markets in Manicaland

Commodity Marketed	Variants	Source Markets	Aggregating Markets	Output Market Processors
Cereals	Maize, wheat, small grains, cassava	Manicaland and from Mashonaland	GMB depots and collection centers	Grain Millers Association, private millers, National Foods, Victoria Foods
Edible Oils and Pulses	Cotton seed oil, beans (red white, purple, etc.), sunflower	Makoni, Mutasa, Chipinge, Chimanimani	Cotton depots in Chipinge and Chimanimani	National oil companies
Dairy	Milk production by large and small producers	Chipinge district	Dairibord limited with a processing plant in Chipinge	Dairibord covers the national milk markets
Horticulture	Leafy vegetables, onions, tomatoes, potatoes, sweet potatoes, fruits (oranges, naartjies, avocados, nectarines, etc.)	Nyanga, Chimanimani, and Chipinge districts	Cairns Holdings, Matanuska	Cairns and Matanuska

Source: Authors based on fieldwork information.

Regarding fish, the Kariba dam is surplus producing, supplying the whole country. Kapenta fish are most frequently purchased by poor households. Various types of fish (both dried and fresh) are imported from Mozambique (from Beira). Buhera is a surplus-producing district in cattle and goats, whereas other districts, such as Chimanimani, Makoni, and Chipinge, are in deficit.

Charles Dewa (2015) noted that in Zimbabwe informal markets like Mbare and Sakubva handle more than 50 different crops and food varieties from around the country every day. These pull together many value chain actors such as farmers, traders, processors, transporters, and consumers. Markets become highly networked and competitive: success no longer just depends on what a farmer or an entrepreneur does but on the actions of rivals or competitors.

Provincial Economy and Livelihoods

Development in Manicaland Province does not present evenly across the province's districts, mainly due to the various agro-ecological zones found and also because the prominent resources create national and provincial contradictions, as reflected in the diamond industry. This situation is far wider, such as observed with the ethanol investments in Chipinge that, again, skew development toward a national priority investment. Another example is plantation agriculture in Chipinge, Nyanga, Chimanimani, and Mutema which makes investment and related investment to focus on certain priority crops. Dominant companies exemplifying this approach to development include Tanganda Tea Company, Dairibord Zimbabwe, and Cairns Holdings, as well as a variety of motor-building companies.

However, smallholders in the province have been outstanding in the production of bananas in Rusitu, Burma and Honde Valley. The banana investment is currently spreading to fields in Chipinge and Mutema areas by Matanuska, where they are assisting local farmers with banana plantations. These local farmers are realizing a minimum of \$500 per month, which is above the Poverty Line and at a much higher-level income than an ordinary civil servant. This is in addition to a variety of other fruit industries that are in recovery, such as mangoes and pineapples. The vegetable production is also being resuscitated by Cairns in Chipinge, Chimanimani, and Buhera, and the potatoes production in Nyanga has a ready-guaranteed market at Cairns. Despite the political contestations, smallholders in different crop value chains are self-organizing—at times with the assistance of companies and NGOs — to break the constraints; as a result, these smallholders are becoming competitive.

Most of the markets emerged in strategic places that are convenient to customers, easily accessible, close to producers, and economically vibrant. This implies that the markets are somehow busy. However, within the marketplace, traders still locate themselves differently for various reasons. Many of the vendors make an income of approximately \$300 per month, which is equivalent to what most workers in government and the private sector earn. Such entrepreneurship roles are regarded as better than manual work in the fields, where incomes from crop produce sales are very low and unpredictable, particularly when the production is marketed to Government parastatals such as GMB.

In many areas, there is a growing stratum of shopkeepers whose livelihood is essentially a strategy for minimal survival. They typically receive less income, and they do this work to supplement an inadequate income from farming. Therefore, subsistence farming still remains central, yet it also contributes to a division of labor within families, as some members partake micro-entrepreneurship.

Within the industry, traders set up their businesses differently. Some looked for capital first, while others started by selling the few crops and livestock they were producing. Some converted the remittances they had received from South Africa into capital, while others had to borrow some money from other established businesspeople. Casual labor was also a common source of business capital. There were no incidences of vendors who had borrowed money from the bank as these organizations require collateral security that vendors apparently had no access to. Some joined existing markets (usually older women are doing vending), while others started at new sites altogether.

Market Infrastructure

Before trading in anything, one has to first pay levies to the council for use of its infrastructure. The amount for traders at the cattle auction markets was \$5 per day. However, vendors with tables at business centers were paying between \$5 and \$11 per month. Where there was no market

infrastructure, people had erected some sheds (using black plastics). Others just went under a tree and put cardboard boxes as stands to start their businesses.

Generally, most of the food items in both urban and rural Manicaland shops are imported. The shops provide the food related products and services that people generally require. Because of the liberal policy removing stringent controls on trade that has been adopted (in as far as the importation of food is concerned) by Government since the early 1990s, there has been competition of supplies so much so that there has been a subsequent reduction in prices. On the other side, the imports have subjected local producers to cutthroat competition, and they are being forced to sell their products below breakeven prices. Between June 2017 and February 2019, there were many instances where stock feed manufacturers were importing maize from Zambia and South Africa because the landing price of \$320 per metric ton was far cheaper than the local prices that hovered around \$390 per metric ton.

Food markets in Manicaland Province are dominated by major staple foods, which is reflective of most parts of Zimbabwe, regardless of region or province. These are mainly cereal grains of maize, imported rice, wheat for processors, and small grains (mostly sorghum and millet). However, small grains are becoming more popular in the province due to their promotion by the Government and NGOs.

Major selling points: There is a wide network of market infrastructures centered around the urban centers and along the main highways in the province. These are also connected to rural and mining centers. The people's markets are mostly found along the road from Mutare to Masvingo. There are thousands of travelers who pass through every day. In proximity, there are also hundreds of retail service centers, including agricultural markets designated by local authorities. The growth in the demand of food has contributed to the mushrooming of open sales in the informal sector across most of the business centers in Manicaland.

The main processors: Manicaland is a key province in job creation through agricultural product value supply chain aggregation and processing for domestic and export markets. In the commercial agriculture sector, there are several companies or subsidiaries that process tea and coffee, tomatoes, and timber; these are valuable for job creation and enable citizens to acquire foods from the markets. In addition, there are private companies that import commodities such as rice and repack them for the domestic and international markets. Rice is a key commodity, with companies owned by foreigners and nationals leasing—for instance—part of the Zimbabwe Coffee Growers Association for a rice import and redistribution business.

Retail supermarkets: There are several national retail chains, such as TM, OK, SPAR, Gutsai, PicknPay, and Bon Marche, that sell food items and influence the markets. In addition to the large supermarkets are many registered retail shops that sell food in the various markets of Manicaland. Processed maize is largely found in most retail shops, with prices having changed when the multi-currency was abandoned in July 2019. The several retail outlets in small towns (Nyanga, Chimanimani, Chipinge, Checheche Growth Center) provide important food market services in the province.

Key Reference Markets and Marketing Basins

The districts within Manicaland Province are part of one broad marketing basin that is linked with Harare, Sakubva, and Mozambique. The direction of trade (including seasonality) and strength of linkages between distant markets depend on the commodities traded. A number of important reference markets operate across the province, including the well-established Mbare Musika in Harare and Sakubva Musika

in Mutare. The most important reference markets that serve multiple roles as assembly, wholesale, and retail markets are found in the districts of Buhera and Chimanimani and along major roads. There are likewise key cross-border trade points.

Barriers to Entry

Trading of grains in Zimbabwe is largely controlled. Price floors are set by Government soon after harvest. Ironically, Government sets the same price for both small grains and maize even though small grains are of high value and have different production costs. However, small grains fetch higher prices by margins as high as 50 percent over and above maize price in open markets, especially with beverages-producing firms. In June 2019, the Government of Zimbabwe issued Statutory Instrument 145 of 2019, which banned trading of maize and thereby paved the way for GMB to solely handle the trading of maize. Markets for groceries—that is, processed foods and basic commodities used by households on a daily basis—are different and characterized as competitive. Distributors of foodstuffs (manufacturing firms) channel their products via established retailers and wholesalers who later sell to informal traders at “gazetted” prices: that is, prices set by the government over the course of the year. Table II includes key characteristics of Manicaland commodity markets.

Table II. Key Characteristics of Commodity Markets in Manicaland

Commodity	Characteristics
Maize Grain and Maize Products	Many actors of varying sizes are present in the marketing system. Trading of maize is governed by the Government, and GMB has sole monopoly in the trading of maize, save for household-to-household transactions. While men dominate trading companies and wholesale markets, women are more prevalent in retail markets. A few companies in Zimbabwe manufacture mealie meal; these brands, such as Red Seal, Ngwerewere, Sunny, and Probrands, are commonly distributed through supermarkets and manufacturer retail outlets (mealie meal is generally available in Manicaland, even in the rural areas).
Pulses	Groundnuts, round nuts, cowpeas, and beans are produced at a small scale for household consumption. Local and regional supply and demand determine prices and direction of trade. Traders in Manicaland sourced these from districts such as Buhera, Makoni, Nyanga and regional countries such as Zambia and Malawi.
Edible Oil	Locally produced edible oil is manufactured by a few industrialized oilseed processing firms. These firms are fortified with well-defined distribution systems within the three provinces and are largely available. Oilseed processing firms rely on both locally produced and imported oilseeds (including sunflower and soya) as well as imported crude vegetable oil, which is refined and fortified locally. Imported oil brands from Mozambique and South Africa are available through informal channels and are less expensive and highly preferred. Vendors typically sell other products along with edible oil, so there is relatively less seasonal entry/exit onto markets.
Sorghum/millet	Small grains such as sorghum and millet are mainly produced in drought-prone parts of Manicaland (Buhera and Chimanimani). Households underscored that in as much as they appreciate the role of small grains in mitigating the effects of climate change, they lose large part of the crop to birds. As a result, millet and sorghum produced in these

Commodity	Characteristics
	areas is mainly for household consumption. In cases where there is surplus, the low volumes that do reach markets are sold by women mostly through barter-trade in exchange for maize. In few cases, surplus sorghum/millet is channeled to GMB at same price of maize.
Livestock	Sale/purchase of livestock typically takes place between individual buyers and sellers outside of formal marketplaces. Large cattle herds are in the hands of a relative few wealthy owners, concentrated in Buhera. Poor households own small ruminants and chickens. Meat is sold in kilograms by butcheries operating in markets. Purchase and consumption by poor households is limited. Movement of livestock across district borders is influenced by zoonotic disease conditions (foot and mouth disease, for example). Stakeholders revealed that livestock ownership among the poor is not a clear pathway to increased meat or livestock product consumption, but has been linked to improved income. From a gender perspective, men dominate ownership and sell of cattle while women dominate ownership and sell of chickens and small ruminants like goats.

Most recently, households have been driven to bartering in the almost total absence of hard cash in rural areas. People in marginal rural areas such as Chipinge, Buhera, Chimanimani, and Mutasa districts indicated that they have been fleeced of their livestock assets as they have to barter cows for 50 kg maize meal each. While many have tried to survive in the trade sector (for food and non-food items), they have had mixed outcomes. While barter at the village level has always existed, it is the frequency and exploitative nature of it that has changed. This is no longer the neighborly process of exchange, but is a case of rapid depletion of major assets—often bartered to people from outside the district—that has plummeted families into deeper poverty and is threatening food security.

A major outcome of the rise in local trade has been the significant amount of money circulating outside formal channels. Entrepreneurs without access to formal banks created their own micro-lending institutions called “*mikando or marounds*,” which are dominated by women. These have become the most popular means for raising capital for “projects,” which can range from agricultural (poultry), petty trading, investing in illegal mineral (gold) purchases, repairs, food processing (honey and spices) and marketing, and imports of cheap goods to be sold at inflated prices. *Marounds* are composed of between 3 and 20 people who each contribute portions of their daily profits. The money is given to one member of the club on a rotational basis. *Marounds* became a more convenient way of saving in a stable environment. Most women have resorted to asset-based savings due to the prevailing unstable economic environment. The schemes were social in nature because they were frequented by people who know each other and therefore could be traced. The flexibility of *marounds* is in the ability to join, gain money for a specific purpose (usually buying goods), and then pay a round part and move on if no longer interested.

Market Accessibility

Across the province, markets were regarded as fairly accessible. Most of the owners of vending stalls are men, and women rent these from men. Women dominate local markets as retailers (60 to 80), while men are most of the wholesalers dominating external and high-value markets, due to the amounts of capital required. Odd wholesale market opening hours restrict women from participating directly in

wholesale activities: they present security challenges for women while at the same time interfering with their traditional roles of arranging the day for the household (such as preparing children for school). Most women featured in the horticulture food markets, whereas men mostly sold grain since grain is heavy and women were not prepared to carry loads every day. On the other hand, men consider the selling of horticulture commodities such as tomatoes and vegetable as a women's form of livelihood. Large livestock markets are dominated by men while women dominate small livestock markets as well as sale of livestock products such as eggs.

Marketing of crops follows the classification of crops as men or women's crops because this determines the size of production and the amount of yields. Since women produce crops in small quantities, traveling long distances does not make it sustainable in terms of time, energy, and cost for transport. Men are mostly involved in the marketing of high-value crops, especially to the GMB. They also spend more time away from home as it is often needed to spend several days at the market.

A common feature of urban markets was cooking fire where women were seen preparing food for sale. Common foods prepared in the markets are alternatives to *sadza* and bread, which have become expensive for the ordinary person since the beginning of 2019. The high prices of these commodities have opened up opportunities for women to prepare and sell *mutakura* (maize boiled together with either groundnuts, cowpeas, and/or Bambara nuts); sweet potatoes; roasted groundnuts; and *mahewu*, a nonalcoholic fermented beverage that has managed to regulate the prices of bread and maize.

Market Conduct

Marketplaces should be places for information exchange, which comes in a variety of forms: the first of which is the price to which the farmer expects at the market. This price intent is smoothed based on what other farmers are offering/and expecting. This factor gives rise to Mbare as a dominant market information and price determinant. The market informs the marketers and consumers about quantities available. Currently, platforms such as Hurudza, Esoko, Ecofarmer, and EMkambo at Mbare Musika provide information and advice on the alternative seasonal crops to grow and maintain a database with the number of growers and what they produce, and the number of livestock sellers. Mass markets such as Mbare, Sakubva, and Mucheke enable farmers to meet informal financiers, such as traders who can easily finance certain crops without need for collateral. As financiers, traders can also advise farmers on what crops to grow, when, and how. It is also through mass markets that farmers are able to maintain their customer base and also get new customers. Farmers also gets educated about the preferred packaging materials and sizes as well the best way of packaging specific commodities.

Vendors sell their products mostly to local people. This was the normal trend as traders were able to supply what is most needed by the people. They were also more convenient to their clients as they could sell even to their neighbors. Many of the traders provide goods on credit to their clients because they know each other; those who belong to the community over a period of time creates trust. Credit is then repaid without a defined standard of time. Traders undertaking transactions at the community level were also willing to sell their products through barter-trade as some of the local people did not have money. Traders were selling 2 kg of sugar in exchange for a 5-liter tin of round nuts, groundnuts, maize, or any other crop. This kind of trading was popular especially for clothing traders, who could exchange clothes for traditional chickens, crops, or even casual labor. This form of market has made life easier for the poor, who may opt to offer labor in exchange for a particular commodity they might want. The type of labor offered depends on the season, with the most common being weeding and harvesting of crops.

Entry/exit into Markets

In all the markets studied, common challenges were identified that require rectification, such as low stock turnover (low sales) due to poor circulation of money. The majority of populations prefer maize grain to small grains due to the extra labor involved in processing the small grains. Processing involves the partial separation and/or modification of the three major constituents of the cereal grain - the germ, the starch-containing endosperm and the protective pericarp. Most traditional processing techniques used in the province are laborious, monotonous, and carried out by hand. They are almost entirely left for women to do. The traditional techniques that are commonly used in the province include decorticating (usually by pounding followed by winnowing or sometimes sifting), malting, fermentation, roasting, flaking, and grinding. These methods are mostly labor intensive.

This, coupled with consumer taste and preferences, influence the low stock turnover of these small grains. Financial problems on the side of buyers resulted in low sales on some of the basic commodities in the shops. Poor road networks resulted in maize grain and other basic products not being available in every corner of the districts, even though potential buyers could be found. As with other aspects of the market context in Manicaland, market entry and exit behavior varies by commodity. Traders dealing in maize (maize grain and pulses) exhibit a relatively low degree of entry and exit (seasonal and interannual), depending on actual and perceived market trends. Uncertainty on markets created by national maize marketing policies does influence entry, exit, and incentives to scale up operations in the production of maize: in particular, for example, the recent Statutory Instrument 145 of 2019, which banned trading of maize and effectively criminalized the trading of it.

Poor households buy livestock (small ruminants and chickens), maize, and, to a less extent, crops such as beans from the market. Maize and sorghum are purchased from the nearby GMB depots, while products such as edible oils are purchased from the grocery shops. Traders of processed goods (edible oil, peanut butter) are less transient in nature, typically selling other processed goods on a more permanent basis throughout the year. The units of measurement vary depending on the market.

Table 12. Common Units of Measure Practiced in Manicaland Province

Commodity	Unit of Measurement
Maize Grain	50 kg bag if from GMB, but 20-liter buckets are common in other markets
Pulses	Cups of varying sizes
Edible Oil	750 ml and 2 liters
Fish	5-liter tin and heaps of various sizes
Eggs	36-egg tray
Beef	Meat is sold in kilograms at butcheries

Source: Authors based on fieldwork information.

Price Setting and Price Discovery

The price setting and price discovery process depends on the level of coordination (localized or more general) for a given commodity. However, since 2018, a three-tier pricing system has been in operation, where people pay different prices for the commodity, depending on the mode of payment the customer is using. Goods are thus priced differently in U.S. dollars, bond notes, or Eco cash. Commodities are priced cheaply in U.S. dollars because of the dollar's high value and demand on the market. Goods sold in U.S. dollars can receive discounts of up to 25 percent. Owing to cash shortages, prices are also better in cash to lure in cash customers. The most expensive mode of payment is mobile money, due to the 2 percent intermediated money transfer tax on all electronic transactions worth \$10 and above, which was introduced by the Government in October 2018. On top of this 2 percent government tax, Econet also charges almost 3 percent per transaction for sending money. Traders generally charge between 40 and 60 percent transaction fees for all EcoCash transactions.

Edible oil and eggs produced by large firms have administered prices set by the manufacturer; these are communicated to their network of distributors and vendors. However, some localized differences may account for the large variation in transportation costs between Harare and Mutare (where manufacturers are located) and more distant district markets.

Pricing of maize and maize products is influenced by GMB pricing regime, which seems to favor subsidies to consumers. However, the informal market operates in a mostly free market environment where prices respond to forces of demand and supply. The impact of the recent enactment of the Statutory Instrument 145 of 2019 (Grain Marketing Control of Sale of Maize Regulations, 2019), which makes the GMB the sole buyer of maize, is likely to have major effects on market structures and linkages. The prevailing policy of pricing maize above market equilibrium contributes to the high numbers of people with huge difficulties accessing food in the market. The indiscriminate output subsidies offered to maize producers result in more benefits to a handful of surplus maize producers while disadvantaging the majority of smallholder farmers who are food net buyers and market-dependent, especially after their own production is exhausted. In addition, the current trade restrictions have meant that a Zimbabwean consumer has been paying around 50 percent more than consumers in Malawi and Zambia since 2013.

For products such as rice, the assessment found that prices are largely determined by the cost in the source market, the cost of transportation, and traders' desired profit margins. The assessment confirmed that formal commodity trading associations (such as those seen in other parts of the world) do not play an important role in Manicaland, although market-level coordination occurs among traders to establish daily market prices as a function of the key considerations listed above. At the retail level, only butcheries and GMB regularly offer to weigh goods sold by weight. For foods sold by volume, the actual volume of the unit of measurement remains the same throughout the season, thereby removing seasonal variations in prices and food access.

Livestock markets are composed of cattle markets and small livestock markets. Cattle markets have an organized calendar developed by the council, which permit movement of the market from one location of the district to another. However, livestock markets operate in three main dimensions which include: 1) auctions (*mariketi*); 2) private sales; and 3) the kilograms method. Auctions are held in the designated points following the dates allotted by the council. This market is governed by the council, secured by the police and the Livestock Production Department. Private sales involve the farmer negotiating with the buyer privately at the homestead. The buyer looking for cattle comes and negotiates with the seller until they agree on a particular price. The same method involves the selling of other small livestock such as

chickens, rabbits, sheep, and goats. This, however, is subject to manipulation of the seller since he might not have sufficient information on pricing. Lastly, the kilogram method requires the trader to travel with the cattle to the abattoirs/butcheries and first slaughter them and then have the meat weighed to be paid accordingly. This has its own drawbacks as cattle are only weighed after other parts have been removed. More important is the fact that transporting cattle to the market may be expensive for the seller, as this kind of market is situated in cities and towns elsewhere in the country. Table 13 presents average prices of selected commodities in Manicaland Province.

Table 13. Average Prices of Goods on the Market in Manicaland Province

Item	Quantity	Average Price in US\$
Sugar	2 kg	\$2.30
Edible Oil	2 liters	\$3.50
Salt	1 kg	\$1.00
Rice	2 kg	\$2.60
Mealie Meal	10 kg	\$2.50
Flour	2 kg	\$3.00
Mopane Worms	20-liter bucket	\$15.00

Source: Authors based on fieldwork information.

Market Performance

Markets in Manicaland Province are thin, meaning that surpluses are generally limited, which showcases that variations in supply and demand can have important implications for price trends. This is especially the case in the structurally deficit districts such as Chimanimani and Chipinge. The private sector is not highly responsive to market signals (whether real or perceived), resulting in no seasonal variations in the quantities traded on markets and in prices, although the extent of seasonal price variation depends on the commodity.

Maize, pulses, and other crops exhibit very weak seasonal price trends (see Figure 7 and Figure 8).

Figure 6. Seasonal Variation of Maize Prices in Manicaland

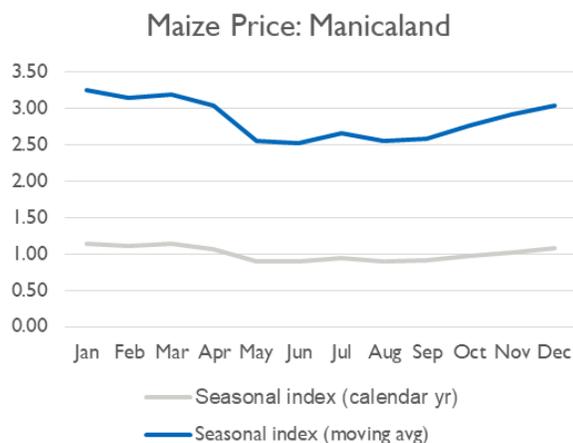
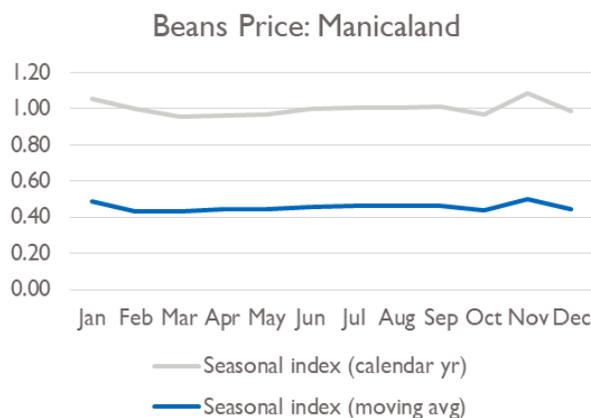


Figure 7. Seasonal Variation of Beans Prices in Manicaland



Source: Authors' calculations.

Dominant factors that influence constraints to increasing market capacity in response to increased demand include liquidity challenges (access to cash), exchange rate variability, shortage of foreign currency, fuel challenges, and source market prices. A number of factors affect households' food access in the province. These include high cost of transport and distance to markets, which reached up to 15 km (three hours on foot) among households interviewed. Isolation in some areas during the rainy season creates additional physical market access issues. Exchange rate-induced price variability was observed as a major factor contributing to the erosion of households' purchasing power.

For the main reference markets visited during the assessment, the most commonly consumed food stuffs are available year-round during non-crisis years but with no distinct seasonal trends in terms of the prices and quantities trade. The assessment revealed that sorghum and millet are much less commonly marketed and consumed in Manicaland. In this province, supplies in markets are either very limited or not available.

The assessment found that edible oil and meat/butcheries are always available on rural markets, even during non-crisis years. However, several households reported a lack of availability of maize, some varieties of pulses (beans or cowpeas, depending on the area), and fresh fish in smaller rural markets between the months of September and March, especially in the drought-prone districts of Chimanimani and Chipinge. The assessment shows that households travel to the local GMB depots during these months to meet their food needs.

Time series data are not available for all commodities considered in this study; however, evidence does suggest that markets are less responsive/reactive to market signals (including shocks), whether they are actual or simply perceived. Markets show no commodity price co-movement for maize and pulses between major market towns within Manicaland and with other key reference markets in the province (Figure 9, Figure 10). This result shows that the market prices of pulses and maize is not influenced by prices of the same commodities in other markets. There is no maize and pulse market integration in the province. The result is supported by weak correlation, for instance correlations of 0.001 and 0.005

between Sakubva and Murambinda for maize and pulses market prices respectively. (See Annex 4 for the methodology used to calculate the seasonal price indices)

Figure 8. Seasonal Variation of Maize Prices in Manicaland (Co-movement)

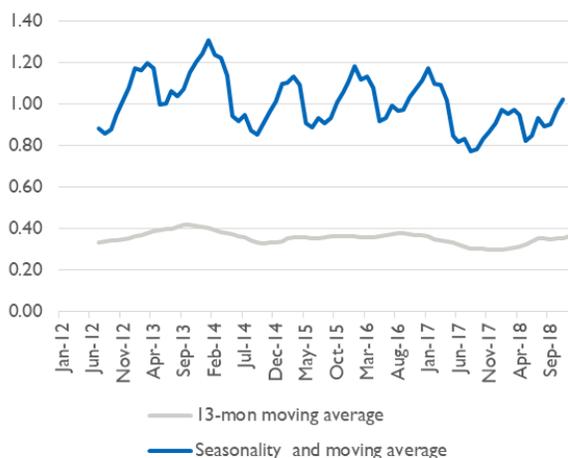
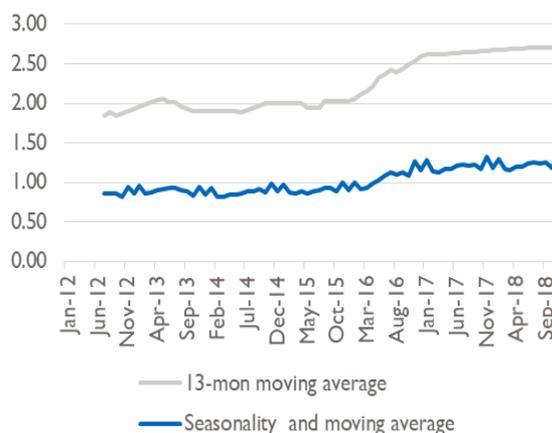


Figure 9. Seasonal Variation of Beans Prices in Manicaland (Co-movement)



Source: Authors' calculations.

The assessment shows that the strength of integration (strong price signals and trade linkages) declines in more isolated/distant areas due to relatively high transportation and marketing costs, especially during the rainy season, when markets can cease to operate temporarily. The field assessment found the focus commodity markets to be integrated through trade through three main pathways: 1) long-distance trade, with maize, pulses, and fish traders from the main reference markets in Zimbabwe traveling very long distances to key source markets (including Harare, Kariba, and Mozambique) to make purchases, rather than from intermediary wholesale/distributions markets, a relatively new phenomenon; 2) itinerant trade through relatively larger maize, pulses, and livestock traders based in a district (Birchenough, Buhera, etc.) or trading center (Sakubva) who sell in Manicaland Province on multiple smaller rural weekly markets in a given district, operating on different market days; and (3) coordinated distribution networks, which apply primarily for processed/manufactured goods sold through shops (edible oil) but also for individual traders in larger markets working through a network of smaller traders.

Challenges and Constraints to Market Stability in Manicaland Province

Zimbabwe's food markets respond to particular policy inducements. The country survive has had to survive the significant additional factors of drought and floods, in addition to serious food challenges. In general, Zimbabwe since 2000 has opened up the economy to imports, and it has in some years (such as 2016) tried to control what the country could import. However, the lack of production and related impacts on manufacturing has meant that the country has remained open to imports. The competitiveness of actors at the production base measured against product origin makes Zimbabwe one of the most expensive countries for producing food. In fact, the dollarization of the economy and attempts to reverse it in 2019 created serious inflationary and exchange rate problems. The low

production in the economy has hit hard on the agriculture sector. Key challenges to market stability relate to policy trials, inconsistencies, and reversal—with national budgetary plans also suffering from these. Key economic actors are left maneuvering through rapid policy changes and regulations that are unleashed without adequate time to understand them and adjust production systems accordingly. Therefore, a key challenge to market stability is that actors face uncertainty in trying to plan around policy constraints.

3. Food Security and Food Assistance

“Food security exists when all people at all times have physical, social and economic access to food which is safe and consumed in sufficient quantity and quality to meet their dietary needs and food preferences and it is supported by an environment of adequate sanitation, health services and care, allowing for a healthy and active life.” —Food and Nutrition Security Policy, 2012

Policy and Legal Framework Relevant to DFSA Programming

International legal framework: Zimbabwe has committed itself to various international and regional legal and policy frameworks relating to food and nutrition security. It is a signatory to the International Convention on Economic, Social and Cultural Rights, Article 11 of which states that every human being has a right to adequate food. The right to food is also enshrined in the Universal Declaration of Human Rights, Article 25, to which Zimbabwe is a signatory. Zimbabwe also committed itself to the 2016–2030 Sustainable Development Goals; among the ten goals it prioritized for implementation is Goal 2, “End hunger, achieve food security and improved nutrition and promote sustainable agriculture.” Article 28 of the Convention on the Rights of Persons with Disabilities, Article 142 (c) of the African Charter on the Rights and Welfare of the Child, Article 24 of the Convention on the Rights of the Child and Article 12 and 14 of the Convention on the Elimination of all Forms of Discrimination against Women also provide for the right to food for people living with disabilities, children, and women, respectively. This has informed targeting of vulnerable women, children, elderly, and people living with disabilities for food assistance; Zimbabwe is a signatory to all. Development Food Security Assistance (DFSAs) programming is therefore relevant to the international legal framework in Zimbabwe.

National policy and legal framework: At the national level, the right to food is enshrined in the country’s Constitution. Article 77 (b) which states that “every person has a right to sufficient food and the State must take reasonable and other legislative measures within the limits of the resources available to it to achieve the progressive realization of this right.” In 2013, the Government of Zimbabwe developed a Food and Nutrition Security Policy with the goal to promote and ensure adequate food and nutrition security for all people at all times, particularly among the vulnerable—in line with Zimbabwe’s cultural norms and values and the concept of rebuilding and maintaining family dignity (GoZ, 2013). Zimbabwe’s Vision 2030, which is aimed at the country’s attainment of upper-middle-income status by 2030, also puts priority on supporting agriculture for food security (GoZ, 2018). The Transitional Stabilization Program (2018–2020) is a document that outlines policies, strategies, and projects to guide Zimbabwe’s social and economic development interventions up to December 2020. The program simultaneously targets immediate quick wins and lays a robust base for economic growth for the period

2021–2030 and also puts into effect measures to stimulate agricultural production with a thrust on boosting farm productivity and farm yields for food security.

Food Assistance Policy Framework

Social protection: Food assistance in Zimbabwe is governed by the Food and Nutrition Security Policy, the Social Transfers Policy Framework, and the Policy Framework for Productive Community Works. The former states that cash is generally the preferred form of transfer; however, food may be more appropriate in food-deficit areas or where markets are not working. The other two policy frameworks identify two principal groups requiring social welfare assistance: households that are labor constrained and those that are able to provide labor. The first group is assisted through the Harmonized Cash Transfers Program, which incorporates a range of interventions including health and education grants. The second group is supported through Productive Community Works, which provides short-term relief through payment of wages in exchange for work. The idea is for the productive community works to contribute to longer-term economic growth through improvements to basic infrastructure and restoration of the local environment, which ultimately will enhance the livelihoods of the most vulnerable and marginalized groups through increased productivity and self-reliance (GoZ, 2013). This policy discourages free handouts of food or cash to affected households, preferring households with labor to receive support through participation in community works that create productive assets. Many development partners in Zimbabwe have already begun to support non-labor-constrained households through Food/Cash-for-Assets projects.

Humanitarian Institutional Framework

Humanitarian Country Team: The Humanitarian Country Team (HCT) comprises all heads of UN humanitarian agencies and up to five NGOs, including one representative from an umbrella national NGO (NANGO). Donors join in the HCT meeting every other month, and Red Cross workers are standing observers in all HCT meetings. The HCT remains the highest-level coordination body for humanitarian non-governmental community. It sets common objectives and priorities for humanitarian action in the country. The presence of donors and NGOs in HCT meetings has played a pivotal role in consolidating the views of the humanitarian community on issues related to the humanitarian reform process and consistently raising these at HCT meetings in a bid to improve overall effectiveness and partnership in aid delivery.

There is further coordination of humanitarian responses in Zimbabwe through the Social Protection Working Group, the Zimbabwe Food Security Cluster, the Food Assistance Working Group, the Agriculture and Food Security Working Group, and the Harmonized Cash Assistance Working Group. The duty of these platforms is to collate and distribute information; identify mechanisms for collaboration and coordination in their various programmatic areas; and establish mechanisms for bridging the humanitarian development nexus. Some working groups, such as Zimbabwe Food Security Cluster, have provincial-level clusters: for example, in Manicaland Province, local clusters hold meetings and share updates (Zimbabwe Food Security Cluster, July 2019). Cluster meeting minutes are posted on the cluster website for information and used by development partners. In the same vein, the Harmonized Cash Assistance Working Group and the Food Security Cluster produce market monitoring and food security monitoring reports respectively for stakeholder consumption.

Interviews with representatives of NGOs referenced the coordinated work in districts affected by the cyclone in March 2019 as evidence of effective coordination. Further evidence of the importance of this coordination is negotiation by the National Cash Working Group, with the Reserve Bank of Zimbabwe regarding Statutory Instrument 142, which provided for a mono currency system in the country. The request to get U.S. dollars from banks for use for cash transfer programs registered traction.

Zimbabwe Vulnerability Assessment Committee: Zimbabwe Vulnerability Assessment Committee (ZimVAC) is a consortium established in 2002 of Government, UN agencies, NGOs, and other international organizations; it is led and regulated by the Government. The Food and Nutrition Council, a department in the Office of the President and Cabinet whose mandate is to promote a multi-sectoral response to food insecurity and nutrition problems to ensure that every Zimbabwean is free from hunger and malnutrition, chairs ZimVAC. The information generated is used for policy formulation and programming by the Government and its development partners. ZimVAC supports the Government in convening and coordinating stakeholders on national food and nutrition security issues in Zimbabwe; charting a practical way forward for fulfilling legal and existing policy commitments in food and nutrition security; and advising the Government on strategic directions in food and nutrition security. Through its watchdog role, ZimVAC supports and facilitates action to ensure commitments in food and nutrition are kept on track by different sectors through a number of core functions, such as undertaking food and nutrition assessments; analysis and research; and promoting multi-sectoral and innovative approaches for addressing food and nutrition insecurity. The group also supports and builds national capacity for food and nutrition security, including at subnational (*i.e.*, provincial, district, ward, and village) levels. Subnational food and nutrition security committees are as active as those at national level in coordinating food security activities, including humanitarian and resilience initiatives at more local levels.

Due to the dynamic programming context, deeper analysis beyond the current ZimVAC reports is needed. A critique of the ZimVAC surveys showed that they do not include all variables typically needed to measure resilience, such as the social capital index, data to compute bonding, and bridging social capital separately, as well as data to compute transformative capacity (USAID, 2018).

Resilience Programming

The long-term development initiative Zimbabwe Resilience Building Fund (ZRBF) provides major support for resilience programming, working to increase communities' capacities to protect development gains in the face of recurrent shocks and stresses, thus enabling them to contribute to the economic development of Zimbabwe. The ZRBF is supported by the Ministry of Lands, Agriculture, Water, Climate and Rural Resettlement (MLAWCRR), the European Union (EU), the Embassy of Sweden, the United Nations Development Programme (UNDP), and the UK Department for International Development (DFID). The interventions are all aimed at achieving increased capacities of helping communities withstand shocks and stresses. The ZRBF also supports national surveys that are critical for resilience programming, such as livelihoods and vulnerability assessments, poverty surveys and agriculture-related surveys. The ZRBF achieves its objectives through multi-stakeholder implementation of three interlinked multi-sectorial outputs:

- **Application of evidence in policy-making for resilience:** The ZRBF set up an independent base of evidence for program targeting and policy-making (including monitoring and evaluation) and promoting capacity assessment. It has also built up central and local government partners to improve application of evidence.

- **Absorptive, adaptive, and transformative capacities of at-risk communities:** The ZRBF increased and improved these capacities by setting up a multi-donor fund that allows partners to come together around the resilience framework and principles to improve adaptive, absorptive, and—to a certain extent—transformative capacities of targeted communities.
- **Timely and cost-effective response to emergencies:** The response system was rolled out via existing safety net and other relevant programs, which ZRBF used to set up a risk financing mechanism that provides—from a resilience perspective—appropriate, predictable, coordinated and timely response to risk and shocks to benefitting communities.

The ZRBF program is being implemented across a number of provinces, including Matabeleland North, Masvingo, and Manicaland. Findings of a 2018 ZRBF program impact evaluation revealed that communities in these provinces still exhibit low levels of resilience, expressed in terms of various outcomes: high rates of poverty as measured by the multi-dimensional poverty index and poor rates of food security as measured by the food consumption score. The three types of capacities—absorptive, adaptive and transformative—were noted to be low as well as evidenced by lack of savings and limited access to formal and informal support services; limited diversification of livelihoods and low production of climate-resilient crops; and low access to key basic services such as veterinary and AGRITEX services, as well as access to markets and infrastructure (Oxford Management Policy, 2018). The impact of Cyclone Idai, which made its landfall in March 2019, worsened the situation in the two provinces of Manicaland and Masvingo by completely destroying bridges and roads and thereby affecting essential service provision and people’s livelihoods (Coote, 2019). The worst affected places are Chimanimani and Chipinge districts in Manicaland Province and Chiredzi and Bikita districts in Masvingo Province. This picture justifies the need for continued support toward resilience-building in the three provinces.

USAID/FFP Development Food Security Activities

Since 2013, USAID has been funding two FFP Development programs aimed at addressing the underlying causes of food insecurity in Zimbabwe: Amalima (2013–2020) in Matabeleland North Province and the Enhancing Nutrition, Stepping Up Resilience and Enterprise (ENSURE) project (2013–2018) in Masvingo and Manicaland Provinces. Amalima is a \$43 million project targeting 56,000 households implemented by a consortia of six NGOs: Cultivating New Frontiers in Agriculture (CNFA), Organization of Rural Associations for Progress (ORAP), Dabane Water Workshops, Africare, Manoff Group, and International Medical Corps. It aims to improve access to and availability of food; strengthen community resilience to shocks, and improve nutrition and health as well as promote gender equality. ENSURE, on the other hand, is a \$55 million project targeting 215,000 households and is implemented by World Vision, Care International, SNV (a development organization out of the Netherlands), and Southern Alliance for Indigenous Resources (SAFIRE). ENSURE aims to improve nutrition, increase income, and promote community resilience, environmental sustainability, and gender equality. In Manicaland Province, World Vision was implementing the project in Buhera, Chimanimani, and Chipinge districts, supporting (through in-kind food assistance) pregnant and lactating mothers and children under five years of age, with a particular focus on those under two years as well as vulnerable households. Food/cash for assets was also applied as a means of supporting resilience-based infrastructure and environmental projects as well as agricultural production. The aim was to reduce high levels of stunting in the province. Although significant achievements were registered in terms of behavior change on gender-related norms on food consumption, task-sharing, appreciation of the nutritious value of small grains, exclusive breastfeeding, and infrastructure development through food-for-asset projects, the major drawback came with Cyclone Idai. The cyclone disrupted people’s livelihoods through destruction

of infrastructure in the province—particularly in Chimanimani and Chipinge districts—and led to calls for both food assistance and resilience support in these areas. Manicaland Province still registers the highest rates of stunting among children between 0 and 59 months old in the country: at 34.8 percent, it's above the World Health Organization (WHO) thresholds of 20 percent (ZimVAC, 2019). Stakeholders interviewed reported that due to the high rates of stunting, more support for pregnant and lactating mothers is needed in the province.

Experiences and Lessons for Program Design

The province had several food assistance programs implemented by the Department of Social Services, international donors, local NGOs, INGOs, and UN agencies. These agencies use different approaches including social protection, resilience-building, emergency recovery, and long-term development initiatives to promote food security. The modalities used include in-kind, cash/food for assets, cash transfers, and vouchers. The main factors influencing appropriateness and feasibility of food assistance modalities in Zimbabwe have been the macroeconomic and political situation, markets and availability of mobile networks, and donor preferences. A flexible, contextualized approach to modality use is key in response to the evolving situation in Zimbabwe.

In-kind Food Assistance

For in-kind assistance, the ration is based on the Sphere Standard and Ministry of Health and Child Care recommendations of 2,100 calories per day. The rations varied from one agency to another. For the ENSURE program, the ration comprised of a 50 kg bag of sorghum for FFAs (2.5kg/day translates to the general casual labor package), 3 kg of corn soya blend (CSB), 1.6 kg vegetable oil targeting pregnant and lactating women and children under two years. For other programs, particularly for lean season support, agencies distributed 10 kg of cereal, 1 kg of pulses (which included sugar beans and yellow peas), and 1.6 kg of vegetable oil per person per day in a household. The number of targeted members varied by program: some programs targeted all household members, whereas others targeted a maximum of five. In all communities, the choice of commodities distributed was not the community's but the donor's, informed by the Government of Zimbabwe's policy. For example, where international procurement of the commodities was done, government policy on Genetically Modified Organisms (GMOs) informed the choice to import sorghum against maize and the choice to import processed commodities such as vegetable oil and CSB. Distribution of sorghum was also in line with the government's thrust on promoting small grains.

Distribution of in-kind assistance has the danger of affecting markets: for example, in the Cyclone Idai-affected district of Chimanimani, where there is heavy donor presence, traders were failing to recover because people were receiving in-kind assistance; most of the shops had closed due to lack of business. Traders instead were recommending cash transfers.

Politicians in Zimbabwe reportedly frequently use food assistance as a political tool. In 2018, a pre-election NGO monitor received reports from across the country of people being excluded from food assistance because of their political affiliation (New Humanitarian, 2018). However, a review of food assistance programs found that USAID food distributions in El Niño response were not politicized like some GoZ ones were. There was no evidence of United States-sourced in-kind food distorting local markets, except in one community (WFP, 2018).

Beneficiary Preferences

Beneficiaries had both positive and negative experiences with the commodities distributed, and these experiences then informed their preferences. Maize meal—the key ingredient in staple food *sadza*—was the most preferred commodity due to the costs of milling. Beneficiaries reported that owing to fuel shortages and subsequent high fuel costs, milling has become expensive to the extent that some demand payment in kind for milling: that is, paying 10 kg per every 50 kg of maize milled. Another benefit to maize meal is it reduces the temptation that comes with maize, of selling it to cover other household needs. (It is still an uncommon practice for informal traders to sell maize meal due to its costs compared to maize.) The second preference after maize meal was maize followed by millet, then sorghum. Sorghum was least preferred because processing is labor intensive and hence women felt it took much of their time, since they process it manually. Furthermore, beneficiaries claimed that after processing the quantity of maize does not change in contrast to that of sorghum, which they said is reduced during processing by almost half.

Relating to pulses, beneficiaries had a negative experience with pigeon beans that were once distributed and had an unpleasant taste and odor, in addition to taking a long time to prepare. They preferred sugar beans, specifically Nua 45 and Gloria. The second preference was split yellow peas, followed by cowpeas, and finally groundnuts. Regarding edible oil, beneficiaries preferred the distributed vegetable oil, which they had nicknamed *gwambas* for its thickness. They preferred this type of oil because it lasts longer than the “watery oil” that is locally available, which is also very expensive.

On livestock the beneficiaries preferred small livestock, with their first preference being goats due to frequent droughts; goats can survive in harsh environments, multiply faster, and are easy to dispose because of their value and because permission may not need to be sought in the event of an emergency. The second preference was chickens for the same reasons. Cattle were least preferred for two reasons: 1) disposing of them can be difficult and 2) their mortality rate is high due to climate change-related diseases.

Commodity Selection

Below are some of the key considerations in commodity selection.

Table 14. Key Considerations in Commodity Selection

Commodity	Key Considerations
Maize	Households tend to boil it in the absence of relish; sell it to meet other household needs; fail to mill it due to high milling costs; can easily be stolen for sale by other irresponsible household members, especially males. Some agencies ended up requesting couples to come for collection of rations due to reports that men who came to collect maize immediately sold it after collection. Sometimes procured from Zambia, but the Zambian market is not yet organized so it is difficult to find it in one place.
Maize Meal	Not a common commodity on informal markets. Agencies have started partnering with local milling companies to distribute white maize meal.

Commodity	Key Considerations
Sorghum	Widely grown in the DFSA areas, hence is readily available for sale to procure maize. Not widely consumed; but produced for sale. More expensive on the market than maize and yet processing reduces the quantity. Should be accompanied by behavior change programming for appreciation of its nutritional value.
Pulses	Locally available all year but quantities are not sufficient for DFSA activities. Prices are not competitive. Between 2018 and July 2019, procuring from Malawi was cheaper by \$250 per metric ton.
Edible Oil	Both local and regional brands are common. Beneficiaries preferred the ENSURE vegetable oil for its quality, which allowed it to last long. There are no tariff codes or fixed amounts so officers at the Agriculture Marketing Authority charge what they want. Regarding fortification, the equipment being used by the Ministry of Health and Child Care is outdated: it cannot detect certain vitamins, hence causing delays when importing.

Lessons Learned

Regarding quantities of cereals and pulses, food assistance beneficiaries felt that the quantities received were sufficient; however, absence of in-kind food assistance targeting other household members, the whole family would share the ration meant for pregnant and lactating mothers and children under two. Pregnant mothers found it difficult for young children who didn't apply for food assistance to watch them eat. They were forced to share with all children in the household who were not supposed to benefit from the ration, resulting in ration dilution. As a result, the ration would not last for the intended duration and would not serve the intended purpose of reducing stunting. Beneficiaries also used the vegetable oil meant for the CSB to prepare other meals and prepared CSB without vegetable oil, owing to costs of cooking oil. An increase in pregnancies was noted from other women whose households desired to benefit from the program.

Beneficiaries also felt that packaging of cereal should be in small quantities to avoid the challenges—such as thefts—that came with decanting the commodities.

Owing to the bad state of roads, especially during the rainy season, delivery vehicles could not access the usual food distribution points close to the beneficiaries, hence it became expensive for beneficiaries to collect food rations.

Food distribution should be complemented by behavior change programs linked to challenging negative social norms, recipes for the food distributed, and appreciation of the nutritional value of certain foods such as small grains.

Modality-specific Considerations

Food distribution used to be done monthly, but after considering the size of the food packs against the logistics of food distribution, fuel challenges and high fuel costs, as well as the amount of time that beneficiaries spent to collect the packs, agencies ended up distributing food bimonthly.

Owing to the bad state of roads, five- to ten-ton trucks that are easy to maneuver were preferred. Transporters increased their fees because of the risk of driving in those roads. They also faced fuel challenges, so communication with them had to be done early to allow them to look for fuel. In worst cases, agencies ended up advancing transporters with fuel and deducting the amounts from their invoices. A shift from distributing maize to distribution of maize meal was noted as becoming common due to high milling costs.

Local and Regional Procurement

Between 2011–2012, most FFP food assistance funding was for Local and Regional Food Assistance Procurement Program (LRP), through WFP. In 2017, regionally procured food comprised the bulk of WFP food distributions. Most was sourced from Zambia and a small portion from Malawi (WFP, 2017). In the same year, investment in a local procurement platform enabled surplus production from FFA to support lean season assistance (LSA) food distributions. In 2018, WFP supported a variety of LRP initiatives and also procured food commodities locally. Locally produced small grains with LSA funding were procured through tenders (guaranteeing smallholders at least 20 percent of supplies). Purchases helped stimulate underdeveloped markets for sorghum (WFP, 2018). As part of WFP’s support to the Scale Up Nutrition (SUN) effort, four additional fortified products (maize meal, wheat flour, sugar, and cooking oil) were introduced into the local market. This was with funding from Royal DSM, a multinational company, active in the fields of health and nutrition. WFP updated its food supplier database—increasing the number of local traders. A total of 1,003 MT of white sorghum was procured from local suppliers for the LSA program. WFP engaged the Regional Bureau to include Zimbabwean traders in its invitations to tender. This is the first step toward linking local grain suppliers to regional markets (WFP, 2018). Overall, WFP was able to procure 89 percent of the planned 1,200 MT of food commodities locally in 2018, with 11 percent procured from international and regional markets (WFP, 2018).

Interviews with stakeholders revealed that both local and regional procurement of grains and pulses are common. The challenges with local procurement of maize and pulses are to do with the unavailability of commodities in the quantities needed, uncompetitive prices, and pushing up of prices by government policy pronouncements on trading of some commodities such as maize. Pulses like cowpeas are in short supply in Zimbabwe, hence agencies resort to regional procurement. Procurement from Malawi costs \$500 compared to \$750 per metric ton in Zimbabwe. Regional procurement is preferred to local procurement, due to price competitiveness and good delivery timelines—although there are challenges for particular value chains in certain regional markets. The major challenge with regional markets is that for value chains like beans and peas, the markets are disorganized because they are still growing. It is therefore difficult to procure the large quantities of between 500–1000 metric tons that agencies usually need.

In Manicaland Province, NGOs such as Caritas procured maize from the local GMB depots, but due to high milling costs that burdened the beneficiaries, they ended up procuring maize meal from local milling companies such as Makonde Milling Company and Bhadhela.

Pulses are mostly procured from Malawi, and Zambia supplies super cereals and maize while South Africa mostly supplies super cereals. The Zambian market is still difficult to aggregate. The Government of Zimbabwe has banned importation of GMOs and hence importing maize from South Africa—though cheap—is not possible.

Different challenges are faced when procuring processed and unprocessed commodities. Humanitarian assistance sector stakeholders reported that unprocessed commodities are easier to import than processed ones. There are more standards-related challenges with processed commodities than with unprocessed commodities and more trade-related challenges with unprocessed than processed commodities. For example, regarding importation of cooking oil, there are no tariff codes or fixed amounts so officers at the Agriculture Marketing Authority charge what they want; and pertaining to fortification, the equipment being used by the Ministry of Health and Child Care is outdated and cannot detect certain vitamins, which causes delays in getting import permits.

Cash Transfers

Cash transfers in Zimbabwe only started to grow significantly in 2009, following dollarization and changes in the political environment (Gourlay, 2011) but were not done at scale for food assistance (in place of in-kind) until 2015 (CARE, 2017). The amount distributed was determined by the Harmonized Cash Transfer Working Group as \$9 per person per month, covering 80 percent of the food basket. In 2014, WFP piloted cash through mobile phones (electronic transfers). This was then continued by Save the Children in 2015–2016, although that organization combined it with cash in areas that had insufficient liquidity, networks, or agents. For their large cash program in 2015–2017, Care/WV had to use a combination of two different mobile money providers (Econet and NetOne) to ensure coverage across their operational areas. Mobile money is culturally familiar and appropriate in Zimbabwe. In Manicaland Province, cash transfers were mostly done by the Government's Department of Social Services through the Harmonized Cash Transfer Program as well as by agencies such as Care and WFP as cash in U.S. dollars and as mobile money. WFP also used cash through a security company called Securico in areas where networks were not there. Cash was the most feasible delivery option due to low delivery costs, quick delivery times, high traceability, convenience, and choice for beneficiaries. (Tango, 2018). Statutory Instrument 142 of 2019 which introduced a mono currency system in the country presented confusion regarding cash transfers, particularly due to different interpretations of the policy by the Reserve Bank of Zimbabwe and the Ministry of Finance and Economic Development. However, negotiations with the Reserve Bank of Zimbabwe resulted in NGOs being allowed to continue with cash transfers in U.S. dollars. The challenge, however, is the absence of *bureau de changes*, particularly in rural areas, which would force beneficiaries to change the money on the black market and thereby face the risk of losing the money to unscrupulous dealers. The recent launch of the EcoCash *bureau de change* where beneficiaries can check rates on the phone, sell their U.S. dollars in real time, and get their money in real time could be a solution to this challenge. However, this does not remove the below barriers that beneficiaries of mobile money transfers face.

The three-tier pricing system was one challenge that came with cash transfers. Cash, though preferred, sometimes disadvantaged beneficiaries as traders followed to the distribution points selling commodities at exorbitant prices. Furthermore, illegal black market dealers also cheated the beneficiaries by offering them low exchange rates for their money. Cash transfers were also linked to GBV. Both male and female FGD respondents reported that generally all household members acted responsibly over food assistance received: when women collected the cash, they used it for its intended purpose, whereas some men sometimes used cash transfers for other things like beer, which may not benefit the household. Due to GBV linked to cash transfers, agencies ended up requesting that couples come to receive the cash and educate them on the use of the money. The general observation was that when the in-kind transfers are collected by men, they are most likely to be taken home and surrendered to the

wife for household use than when collected as cash, which then resulted in GBV after interrogations from the wife on how the money had been used.

Due to cash shortages in the country, mobile money became convenient. However, mobile money attracted 2 percent Government tax on top of an additional 30–50 percent charge that traders demanded for all such transactions. EcoCash prices were therefore higher as traders argued that they would need to cash out the money for restocking of commodities, and this process attracted some charges, hence passing on the charges to the beneficiaries. Furthermore, some beneficiaries faced network connection challenges linked to absence of boosters in their communities and lack of power to charge the phones due to the erratic power supply in the country. The elderly are ignorant on how to operate the phones and rely on children, who then could steal the money from them. Those who do not have phones have sometimes registered neighbors' numbers and then risk losing the money to the neighbor. Traders were refusing mobile money, preferring cash instead for all commodities. They argued that their suppliers demanded cash. Despite these challenges, mobile money had the advantage that it promoted dignity and the beneficiaries' right to privacy, though community monitoring of the behavior of beneficiaries became a challenge. Mobile money was the least preferred due to the plethora of factors presented above. Inflation rates in Zimbabwe were compelling beneficiaries to prefer in-kind assistance as prices of commodities in both local currency and U.S. dollars are inflated at local markets.

Vouchers

The Ministry of Agriculture, Mechanization, and Irrigation Development produced National Guidelines for the 2011/2012 Smallholder Farmer Agricultural Inputs Extensions and Support Program. These state that given the changing environment, and improvements in macroeconomic and food security conditions, more market-based assistance methods to support smallholder farmers are appropriate. These guidelines favor the use of subsidized vouchers. Food vouchers were piloted in Zimbabwe in 2005/2006 (TANGO, 2007). WFP has subsequently been providing electronic food vouchers since 2012, under its Cash Based Transfers. Aside this, vouchers (both paper and electronic) in Zimbabwe have also been used extensively for agricultural inputs, introduced around 2010 following the improvements in macro-economic and food security conditions, and in line with a shift in government policy towards more market-based input assistance methods that could support smallholder farmers (FAO, 2018). The use of vouchers in Manicaland Province was, however, uncommon. WFP was cited as one agency that had used electronic vouchers that the beneficiary presented when receiving food or money. The electronic voucher clearly shows the name of the recipient and ward and only the cardholder can use it. The challenge that beneficiaries cited was when the machine failed to read the electronic voucher, and the beneficiary had to miss their allocation due to this.

FAO under the Livelihoods Food and Security Program (LFSP) used electronic vouchers. The program partnered with Cabs Bank and EcoCash. It identified agro-dealers that provide inputs to farmers. The agro-dealers were equipped with point of sale machines. Beneficiaries contribute 20–50 percent of what they get from the agro-dealer, observing the guidelines for humanitarian assistance, which emphasizes on trying to reduce dependency.

Catholic Relief Services used value vouchers. It identified households that were vulnerable but able to get into agriculture and recover. It then engaged private-sector players to supply beneficiaries with cereal inputs, small livestock, and legumes. Community members with these commodities who expressed interest in selling their commodities could bring their products for sale. Farmers would then shop around with their vouchers. Vouchers had denominated amounts to allow the farmer to buy from

different service providers. As a result of the fares, private-sector players have identified farmers to partner with, thereby infusing money into the communities. Farmers are exposed to different varieties of seed and livestock. Some private-sector players have started demonstration sites in those communities. Vouchers were preferred where programs intended to achieve specific health and behavior change outcomes because they force the beneficiary to use them for their intended purpose.

Food and Cash for Assets

Food/Cash for Assets was a common modality in the province, done during summer, when communities are less busy with agricultural activities. Communities were free to choose specific development projects with the guidance of relevant partners, including the District Drought Relief Committee. Determination of the daily rate as well as the number of working days was according to the Public Works Policy. A range of assets were built from the projects, including dams, irrigation schemes, dip tanks, and bridges, among others that are key for people's livelihoods. However, challenges of shortage of and high costs of commodities such as cement led agencies to resort to regional procurement of some construction materials and pipes for irrigation schemes. Beneficiaries were happy with Food/Cash for Assets because of the noticeable developments in their communities and also because it discourages the non-deserving members of the community.

An appreciation of gender mainstreaming and task-sharing was embraced in such programs. Childcare is organized at the project site to enable women with young children to participate. One person among the beneficiaries, usually an elderly woman, is identified to take care of the children. This person is paid the same wage rate as the other participants. Women at an advanced state of pregnancy are not permitted to participate in the projects. They are expected to quit their participation in the project and be replaced by another household member. Pregnant women were also assigned less strenuous tasks. Women and men both were encouraged to participate in tasks that were traditionally not meant for each of their sexes. These initiatives were complemented with capacity-building in such tasks. For example, women were encouraged to be active in construction work and were trained in construction. The practical gender mainstreaming initiatives led to a better appreciation of gender issues at the community level, as opposed to abstract and theoretical understanding of gender as just referring to women.

Targeting

Targeting for humanitarian assistance generally follows a three-stage approach. The first step is geographical targeting as informed by the findings of regular or emergency needs assessments, such as provincial and district poverty rankings; provincial and district human development indices; ZimVAC data and analysis; drop and livestock assessments; nutritional status; and income levels. Geographical targeting is then followed by ward selection done in collaboration with the District Drought Relief Committee. Selection of beneficiaries is done through public meetings under the local and traditional leadership structures.

Figure 10. Weir Dam in Chimanimani District



Source: Authors.

4. Main Conclusions

Modalities: Manicaland Province is a food-deficit area with high levels of malnutrition. There are sufficient, accessible, and safe storage facilities in the province for both food and non-food items. Although there is almost 100 percent network coverage, some districts are affected by weak connectivity, which thereby limits the possible use of mobile money. The road network is good; however, feeder roads are in a bad state, presenting serious challenges particularly during the rainy season as costs of food deliveries become hefty for both the NGOs and the beneficiaries. This calls for ways to explore greater complementarity between cash and in-kind assistance and consider a mix of cash and food where appropriate.

Market Monitoring and Other Program Support: Policy changes and inconsistent implementation of such present serious challenges for programming. Humanitarian work in a highly dynamic context such as Zimbabwe requires multi-disciplinary teams that conduct ongoing risk analysis in changing contexts, liquidity monitoring, market monitoring, increasing beneficiary education and communication, using comprehensive accountability systems including consulting leaders, regular meetings with communities to verify receipt and resolve problems, using gender and accountability focal points, time and resources to educate beneficiaries, contingency plans with service providers if there are challenges, seasonal top-up grants (Tango, 2018).

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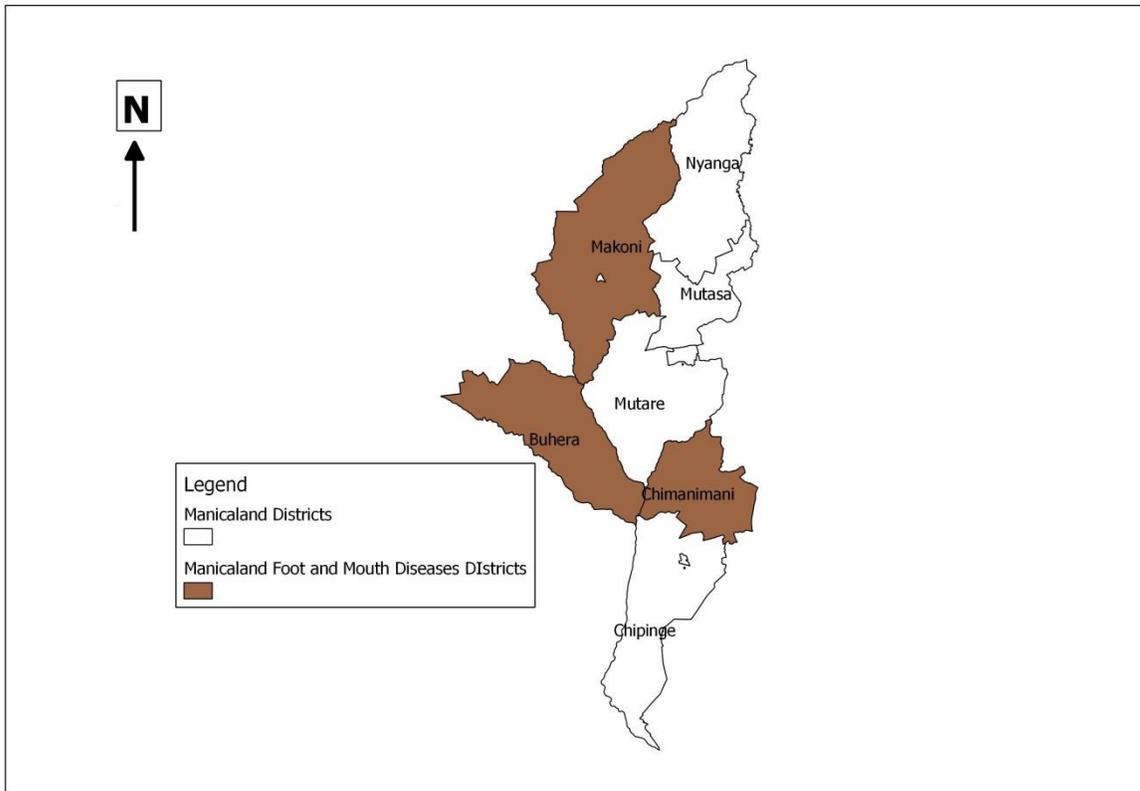
Annexes

Annex I. Market Study Methodology

The study made use of desk reviews that involved a review of market assessments conducted in Zimbabwe in general and Manicaland Province in particular. In-depth interviews were conducted with a total of 51 key informants in the three districts of Chimanimani, Buhera, and Makoni, as well as in the provincial town of Mutare, distributed as follows: 19 market actors (transporters, wholesalers, retailers, importers, and market managers); 21 representatives of government departments (Health, Agriculture, Social Services, Women Affairs, Youth, Environment); 3 representatives of the GMB; 4 representatives of financial service institutions, which included banks and mobile money transfer agents; 4 representatives of NGOs working in the area of humanitarian assistance; and 8 FGDs: 3 with women only, 3 with men only, and 2 that combined both men and women. The following markets were visited and observed during the study: Sakubva in Mutare city, Chimanimani central, Hotsprings, Nhedziwa and Nyanyadzi in Chimanimani, Murambinda in Buhera; and Nyazura and Vhengere in Makoni. The study used key gender issues and gender analysis methods to disaggregate issues. Data collected at provincial level was complemented by data collected from national-level stakeholders, who included representatives of the various relevant government departments such as Trade, Transport, and Agriculture. Other stakeholders interviewed include the Agriculture Marketing Authority, millers associations, Grain Marketing Board, NGOs, and market actors at Mbare Musika.

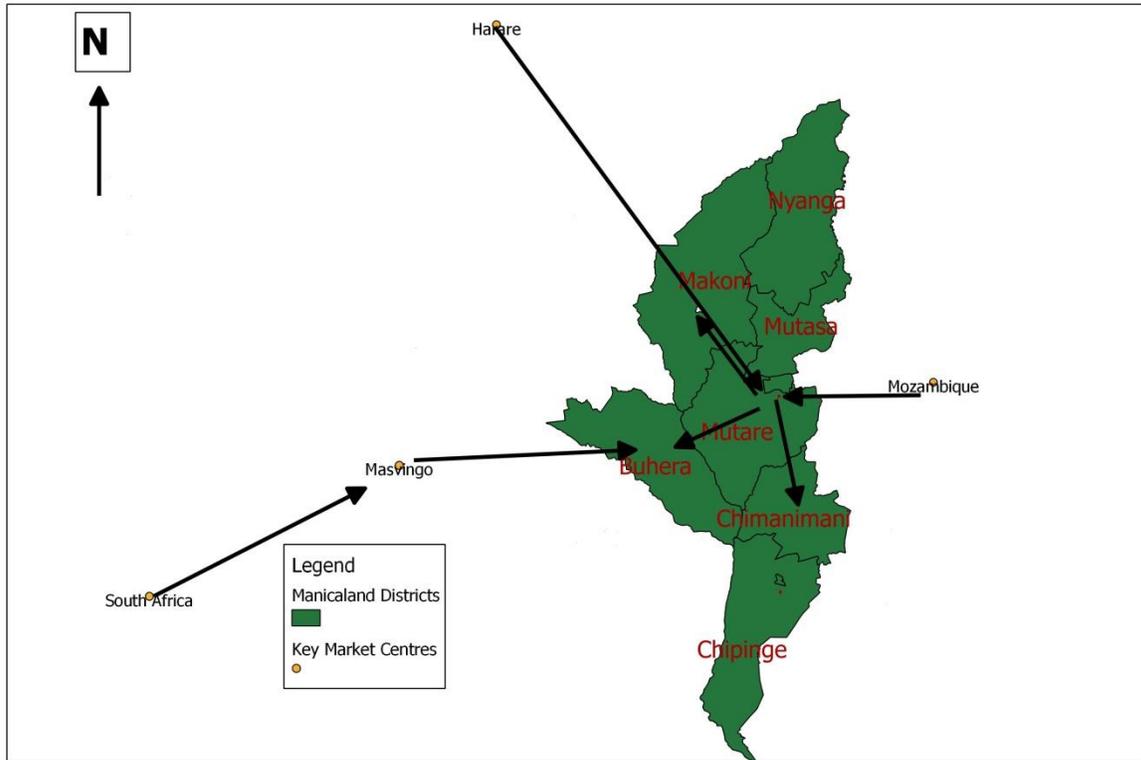
Annex 2. Manicaland Foot and Mouth Districts (2017–2018)

Figure 11. Manicaland Foot and Mouth Disease Districts



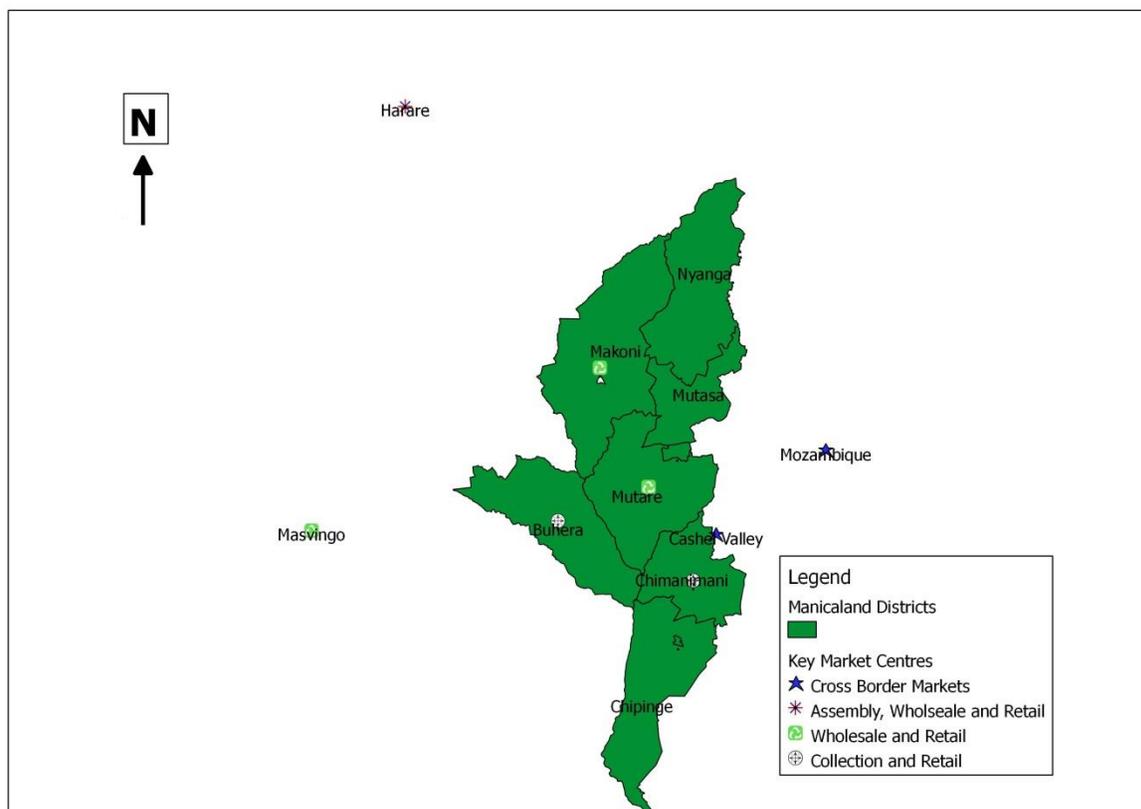
Annex 3. Grocery Flows, Manicaland Province

Figure 12. Grocery Flows in Manicaland Province.



Annex 4. Manicaland Province Market Centers

Figure 13. Manicaland Province Market Centers



Cross-border market: A market that facilitates buying and selling of goods and services between neighboring countries.

Collection market: A rural market where relatively smaller-scale traders (or trader agents) purchase directly from producers.

Assembly market: A market where relatively smaller quantities of a commodity are accumulated or aggregated, usually from different farmers and small-scale traders.

Wholesale market: A market where traders generally sell to traders. The volumes traded in each transaction tend to be relatively larger (for example, multiple 50 kg bags and even metric tons).

Retail market: A market where commodities are sold directly to consumers. The volumes traded during each transaction tend to be relatively small (for example, per kg or locally used bowl or other unit of measure)

Annex 5. Seasonal Price Indices Calculation Methodology

Seasonality Index (calendar year)

Average price for calendar year is calculated by finding the sum of monthly price data and dividing the sum by 12. In this case we calculated *average price for calendar year for years 2012 to 2018* by finding the sum of monthly price data for calendar year and dividing by 12. Ratio of monthly price to average was calculated by *dividing each monthly price data by the average price for calendar year*. Seasonal index (calendar year) is calculated as the *average of ratio of monthly price to average of each month in years 2012 to 2018*. For example, finding the average of the ratio of monthly price to average of January in 2012, 2013, 2014, 2015, 2016, 2017 and 2018 and this gives the January seasonal index (calendar year) value. This was done for each month.

Seasonality Index (moving average)

Average monthly price data is calculated after every 6-month period or semi-annually and this becomes the 13-month moving average. An example is when the average of price data in calendar year 2012 becomes the 13-month moving average value for July 2012. Ratio of price to moving average is calculated by dividing monthly price data by the 13-month moving average corresponding value. Seasonal index (moving avg) is calculated as the *average of ratio of price to moving average of each month in year 2012 to 2018*.

Prices, Seasonality Removed

This is calculated by dividing the price monthly data by the seasonality index (moving average).

Seasonality and Moving Average

This is calculated as a product of 13-month moving average by seasonality index (moving average).