GIEWS Country Brief
Malawi

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FOOD SECURITY SNAPSHOT

- Cereal production in 2019 forecast at above average level, reflecting generally beneficial rains
- However, in southern districts heavy rainfall in March triggered floods which are expected to cause crop losses and lower harvests compared to earlier expectations
- Maize prices increased steeply and were above year-earlier values at start of 2019
- Food insecurity expected to worsen in flood-affected southern districts, but forecast increase in cereal production in 2019 anticipated to improve conditions at national level

Production of maize forecast to increase in 2019

Harvesting of the 2019 main season cereal crops is expected to start from late April.

Production of maize, the main food staple, is forecast to increase to an above average level of about 3.3 million tonnes in 2019. The principal factor supporting the favourable production outlook has been the generally beneficial rainfall since the start of the cropping season in October 2018. As a result, cropped areas in the central and northern regions exhibited satisfactory vegetation conditions at the start of March, inferring a likely increase in maize yields in 2019, with the area sown expected at an average level.

However, in the southern region, which produces about one-third of the national maize output, heavy rains in the first week of March caused flooding in 13 districts. No official data is yet available regarding the impact to the agriculture sector, although crop losses are expected in the worst affected zones. In addition, in areas where there is still standing water or excessive soil moisture, yields are likely to be lower than earlier expectations.

In addition to maize, a production increase is also forecast for the second main cereal crop, rice, similarly reflecting mostly favourable weather conditions, while sorghum and millet harvests are expected at average levels in 2019.

Cereal supplies set to improve in 2019/20

Following a tight maize supply situation in the 2018/19 marketing year (April/March) due to a sharply reduced harvest, prospects

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Cereal Production

<table>
<thead>
<tr>
<th>Crop</th>
<th>2014-18 average</th>
<th>2018</th>
<th>2019 forecast</th>
<th>change 2019/2018</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>000 tonnes</td>
<td></td>
<td></td>
<td>percent</td>
</tr>
<tr>
<td>Maize</td>
<td>3 076</td>
<td>2 792</td>
<td>3 300</td>
<td>18.2</td>
</tr>
<tr>
<td>Rice (paddy)</td>
<td>112</td>
<td>114</td>
<td>134</td>
<td>18.0</td>
</tr>
<tr>
<td>Sorghum</td>
<td>80</td>
<td>80</td>
<td>80</td>
<td>-7.0</td>
</tr>
<tr>
<td>Others</td>
<td>34</td>
<td>25</td>
<td>36</td>
<td>3.0</td>
</tr>
<tr>
<td>Total</td>
<td>3 302</td>
<td>3 026</td>
<td>3 550</td>
<td>17.3</td>
</tr>
</tbody>
</table>

Note: percentage change calculated from unrounded data.
for 2019/20 are more favourable resting on the likely increase in production. The forecast supply upturn is expected to enable a build-up in stocks for both households and national strategic reserves, while import requirements are foreseen to fall and remain at below average levels.

**Reduced supplies in 2018/19 push up maize prices**

Prices of maize increased steeply since the last quarter of 2018, with seasonal trends exacerbated by a tighter-than-normal supply situation. As a result, prices of maize in January 2019 were more than one-third above their year-earlier levels and, for example, in the northern city of Mzuzu they had doubled. In the southern districts, the recent impact of the floods could result in temporary price spikes, due to disruptions to the food supply chain.

Looking further ahead, if the above average production in 2019 occurs, maize prices are expected to come under downward pressure in 2019 following the main harvest that is expected to begin in late April.

**Floods aggravate food insecurity in south**

An estimated 3.3 million people were assessed to be in need of food assistance until the start of the main harvest in April. The most food insecure districts are in the south, reflecting the impact of production shortfalls in 2018. As a result, many households depleted their food supplies from own-production earlier than normal, compelling households to access market supplies prematurely.

Moreover, the recent floods in the southern region, which have affected over 900,000 people, have further compounded the situation. Losses of food supplies, damages to the soon-to-be harvested 2019 crops and reduced access to markets, are likely to aggravate food security conditions. Heavy rainfall, forecast for much of the second dekad of March, could increase the risk of further flooding, potentially resulting in larger crop losses and interruptions to humanitarian operations.

In the central and northern districts, the forecast increase in cereal production is expected to foster improvements in food security in 2019 compared to the previous year.

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