Maize production in 2019 estimated well below average

The 2019 maize crop, the main food staple, was harvested by June and production is estimated at 2 million tonnes, a 50 percent decline compared to the average and about 400 000 tonnes below the 2018 already low harvest. The decrease is mainly driven by significant rainfall deficits in Southern, Western and, to a lesser extent, Central provinces, which combined account for about one-third of the national maize output. Rainfall shortages significantly affected crop yields, while early seasonal dryness instigated a contraction in the area sown to maize.

Outputs of millet, sorghum and rice are also estimated to have decreased to below-average levels for similar weather-related factors. Similarly, production of the winter wheat crop, to be harvested from October, is expected to remain below average, but higher than the previous year when plantings and yields were at below-average levels.

Planting of the 2020 crops, which are likely to be ready for harvest in March next year, is expected to begin in October. Seasonal weather forecasts point to a higher likelihood of average to above-average precipitation amounts during the last quarter of 2019. The favourable weather outlook, combined with the current high cereal prices, is likely to have a positive impact on the extent of the planted area and yields.

Stocks expected to shrink in 2019/20

The well below-average production in 2019 has resulted in a tighter cereal supply situation in the 2019/20 marketing year (May/April), particularly for maize. To compensate for the production shortfall, stocks are expected to be drawn down, while small quantities of imports are foreseen in order to further bolster
supplies. Opening maize inventories in 2019/20 were estimated at about below-average 500 000 tonnes, down by almost half compared to the previous year.

Following several years of large export volumes of maize, which averaged nearly 400 000 tonnes annually (2015/16-2018/19), exports are forecast to decline to a negligible level in the 2019/20 marketing year (May/April), mostly reflecting the reduced harvest.

**Supply pressure triggered steep price rises**

Primarily pressured by tighter supplies, the average price of maize grain, despite a short-lived seasonal dip in June, was almost 70 percent higher on year as of August 2019. Prices of maize meal have also risen steeply since the end of 2018 and, by August 2019, they were between 50 and 80 percent higher on a yearly basis and at new record highs. In addition to the effects of two consecutive poor harvests, the depreciation of the kwacha has added some inflationary pressure.

**Reduced harvests worsen food security**

Food security conditions have worsened significantly in 2019, particularly in Southern and Western provinces. The main cause of the deterioration has been the steep contraction in the 2019 harvest, which especially affected households that entirely rely on agricultural production for food and income.

Overall, about 1.7 million people are estimated to face severe acute food insecurity (IPC Phase 3 and Phase 4) in the May-September period, of which about 269 000 people are assessed to be in Phase 4. The total number of food insecure is projected to rise to 2.3 million in the October 2019-March 2020 period and approximately 412 000 people from this number are expected to be in IPC Phase 4: “Emergency”. Households in this category are expected to face large food gaps and engage in negative coping strategies, such as selling essential livelihood assets. Widespread improvements in food security conditions are only foreseen to occur from March 2020 onwards, when the main season’s harvest period commences.

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