Zimbabwe

Below-average rains adversely impact 2019 crop conditions

Planting of the 2019 cereal crops is underway and it is expected to conclude in early January. Precipitation since the start of the main cropping season (October-June) has been generally below average across most of the country, with more significant rainfall deficits in western areas. As a result, large portions of the country recorded reduced soil moisture levels and below-average vegetation conditions as of December 2018, inferring delayed plantings and retarded crop development. In the key cereal-producing northeastern provinces, between mid-November and mid-December 2018 seasonal rains were above normal in some parts, helping to alleviate moisture stress and boost crop conditions. However, follow-up rains are still required to ensure crop germination and establishment.

In addition to the generally unfavourable weather conditions, economic challenges, including liquidity constraints and foreign currency shortages, have adversely affected availability and access to inputs. These conditions are expected to have also hindered planting activities. The Government continues to implement programmes to reinforce access to agricultural inputs, including the Presidential Crop Input Scheme, which targets about 1.63 million smallholder farmers.

Although it is still early in the season, the current conditions have diminished the production outlook for the 2019 cereal crops. Moreover, weather forecasts for the January-March 2019 period, a key development period for cereal crops, point to a slightly higher probability of below-average precipitation.
Above-average cereal production in 2018

Cereal production in 2018 is estimated at 1.94 million tonnes, 24 percent below last year’s output, albeit still well above the previous five-year average. Maize production, which accounts for nearly 90 percent of the total cereal output, was estimated at an above-average level of 1.7 million tonnes, but 21 percent lower than 2017’s harvest.

The reduced output in 2018 was mainly a result of a mid-season dry spell in January 2018, which caused a decline in yields, while unfavourable weather conditions at the start of the season contributed to a small contraction in the area planted.

For wheat, which is grown during the winter months, production is estimated to have increased in 2018 to an above-average level in excess of 100 000 tonnes, supported by Government programmes to increase access to inputs.

Imports of cereals forecast to remain low in 2018/19

Total cereal imports are forecast to remain at a below-average level in the 2018/19 marketing year (April/March), as the above-average 2018 harvest and large carryover stocks from 2017’s bumper output are expected to satisfy the bulk of this year’s consumption requirements. However, compared to the previous year imports are expected to increase.

Prices of wheat flour and rice climbed rapidly in late 2018

Following generally stable trends throughout most of 2018, prices of wheat flour climbed sharply in October 2018. The rapid rise was underpinned by foreign exchange shortages that acutely constrained the capacity to import adequate quantities of grains and by a steep drop in the value of the local currency (bond notes were introduced two years ago to alleviate liquidity constraints) against the US dollar. The reduced import volumes had reportedly limited milling operations, further pressuring prices. Following the sharp increases in October, prices of wheat flour were double their year earlier values. Prices of rice also increased sharply, but by lesser margins. Although inflationary pressures amplified the seasonal price increases, the price of maize meal, the country’s main food staple, were broadly unchanged on a yearly basis due to overall adequate domestic supplies.

Reduced agricultural output and low purchasing power aggravates food insecurity

During the peak of the lean season (January-March 2019), about 2.4 million people are projected to be in IPC Phase 3, approximately 28 percent of the rural population, and would require humanitarian food assistance. This marks a deterioration compared to the 1.05 million people in the previous year, but is below the levels of 2015 and 2016, when between 3 and 4 million people where in need of assistance, mostly reflecting sharply reduced agricultural outputs.

Most food insecure people are in the northwest, where unfavourable climatic conditions resulted in reduced harvests. The poor food security conditions are also underpinned by
reduced purchasing power that is acutely constraining households’ access to food.

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