Food and Agriculture Organization of the United Nations

GIEWS Country Brief Malawi

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FOOD SECURITY SNAPSHOT

- Early seasonal rainfall deficits, coupled with floods in south, sharply curb production outlook of 2022 cereal crops
- Large domestic maize stocks could help buffer supplies in forthcoming 2022/23 marketing year amid forecast of shortfall in production
- Maize prices rose seasonally in late 2021, price spikes could occur in flood-affected southern districts
- Food insecurity conditions expected to deteriorate due to flood impact in Southern and Central regions, with more than 190 000 households reported to have been affected

Cereal production in 2022 likely to fall to near-average level

Plantings of the main 2022 season cereal crops concluded in early January, with some delay due to a late onset of seasonal rainfall during the sowing period. In contrast to preliminary weather forecasts, the cumulative rainfall amount between October and December 2021 was below average and, temporally, the distribution of rains was uneven with the bulk of rainfall concentrated in just a few weeks. The erratic distribution of rains led to a failure of the first plantings in several areas, resulting in a second round of plantings where feasible. However, access and availability constraints to seeds, limited farmers’ capacity to replant. The estimated acreage of maize, the primary food staple is, therefore, expected to decline on a yearly basis to a near-average level in 2022.

In January 2022, substantial rainfall was recorded across the country, particularly in the south on account of the passing of tropical storm Ana during the last week of the month. The storm caused flooding in several districts, with early satellite analysis indicating large swaths of flooded land along the Shire river as well as around Lake Chilwa. In particular, the southern districts of Chikwawa, Nsanje, Phalombe and Mulanje were the most affected by the floods. Although crops grown in these districts contribute to less than 10 percent of the total national cereal output, the reduced harvests of millet and sorghum are expected to have a significant impact on food security of local households.

Cereal Production

<table>
<thead>
<tr>
<th></th>
<th>2016-2020 average</th>
<th>2020 estimate</th>
<th>change 2021/2020 percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maize</td>
<td>3 142</td>
<td>3 692</td>
<td>4 580</td>
</tr>
<tr>
<td>Rice</td>
<td>119</td>
<td>143</td>
<td>147</td>
</tr>
<tr>
<td>Sorghum</td>
<td>100</td>
<td>138</td>
<td>120</td>
</tr>
<tr>
<td>Others</td>
<td>37</td>
<td>47</td>
<td>40</td>
</tr>
<tr>
<td>Total</td>
<td>3 398</td>
<td>4 020</td>
<td>4 888</td>
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</tbody>
</table>

Note: percentage change calculated from unrounded data.
Even prior to the storm, an estimated 160,000 hectares of crops in Southern Region were reported to have been affected by poor rains during the start of the season and suffered from wilting.

Central and Northern regions were less affected by the tropical storm and the heavy rains have helped to reduce seasonal moisture deficits and instigated an upturn in vegetation conditions in cropped areas. Nonetheless, in late January, remote sensing vegetation indicators showed lower values compared to the ten-year average, inferring generally poor crop conditions.

In consideration of the overall poor rains and the impact of the tropical storm, cereal production is forecast to decline in 2022 from the bumper outturn in 2021 and is expected to fall slightly below the five-year average.

**Large stocks could help to buffer cereals supplies in 2022/23 marketing year**

Total cereal production in 2021 was estimated at a record high level of 4.9 million tonnes and current supplies in the 2021/22 marketing year (April/March) are estimated to exceed domestic demand by a significant margin. The plentiful supply situation is expected to result in a build up of maize stocks to a well above-average level. These large stocks could help cushion a potential shortfall in production in the forthcoming 2022/23 marketing year, at the national level. There are, however, likely to be large regional discrepancies in supplies and a significant supply deficit is foreseen in the Southern Region, given the negative effects of tropical storm Ana on crop production.

**Prices of maize increased seasonally, but remained lower on year**

Although prices of maize grain have been rising seasonally since May 2021, the national average price in December 2021 was 24 percent lower on a yearly basis, reflecting the current ample supply situation. Prices of maize were highest in southern markets and the impact of the recent tropical storm on the supply chain could result in temporary price spikes. Households in the Southern Region are also the most reliant on market supplies.

**Food insecurity likely to worsen in southern districts, although conditions at national level have improved overall**

The latest IPC analysis, issued in December 2021, revised upward the number of food insecure people between January and March 2022 to 1.65 million, citing low agricultural prices of cash crops and an earlier-than-expected depletion of food stocks in Balaka District of Southern Region for the increase. This number is, however, still about 37 percent lower than the estimate in same period in 2021, reflecting the positive impact of the large 2021 harvest and the comparatively low retail prices of maize, the primary food staple.

The highest rates of food insecurity are assessed to be in the southern districts of Balaka, Zomba City, Chikhwawa and Nsanje, where 15 percent of the population is estimated to be facing IPC Phase 3 (Crisis). Households in these districts were already expected to face significant food gaps prior to the passing of tropical storm Ana in January 2022 that had an adverse impact
on the agriculture sector and access to other sources of livelihoods, likely compounding the current conditions and causing a further worsening of food insecurity. Preliminary estimates from the Government indicate that at least 190,000 households have been affected by the storm in Central and Southern regions.

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