Food and Agriculture Organization of the United Nations

GIEWS Country Brief
The Republic of Malawi

Reference Date: 16-December-2025

FOOD SECURITY SNAPSHOT

- **Erratic start to the season, but overall rainfall outlook bodes well for 2026 crops**
- **Maize prices rose rapidly in 2025**
- **Import needs remain high in 2025/26 after two consecutive below-average harvests**
- **Acute food insecurity declines but needs remain elevated in 2025/26**

Erratic start to the season, but rainfall outlook bodes well for 2026 crops

Planting of the 2026 summer cereal crops, to be harvested from next April onwards, is underway. The onset of the rainy season, normally in early October, was delayed by about one to two weeks across the country. Although monthly rainfall totals increased steeply in November, exceeding the long-term average, vegetation conditions in cropped areas still remained below average at the start of December, reflecting both the late start of seasonal rains and the lingering effects of last year's dryness.

Weather forecasts for the December 2025–March 2026 period indicate an increased likelihood of average to above-average rainfall amounts across most parts of the country, driven by La Niña and a negative Indian Ocean Dipole. However, within-season forecasts highlight a high probability of dry and hot spells between January and March 2026 in four key maize-producing central districts. Should these conditions materialize, they could adversely affect maize yields, given the crop's high sensitivity to moisture stress during this critical growth period.

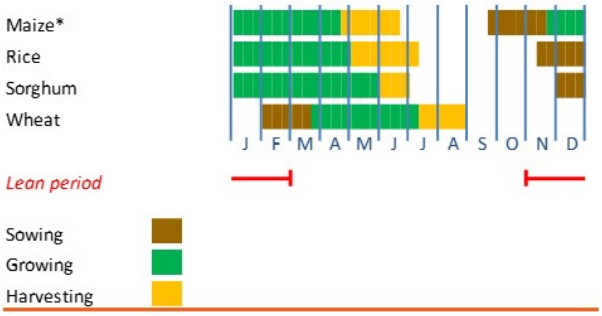
Overall, despite localized weather risks, seasonal weather conditions currently point to a favourable production outlook for the 2026 cereal harvest at the national level.

Maize prices rose rapidly in 2025

The national average retail price of maize increased at a significant pace throughout much of 2025, reflecting the overall tight domestic supply following two consecutive years of below-average harvests in 2024 and 2025. However, in October and November, in contrast to historical trends, the national average price declined albeit remaining 36 percent higher year-on-year.

Malawi

Crop Calendar (*major foodcrop)



Malawi

Cereal Production

	2020-2024 average	2024	2025 estimate	change 2025/2024
	000 tonnes			percent
Maize	3 661	2 713	2 860	5.4
Rice (paddy)	139	127	147	15.8
Sorghum	114	81	114	39.8
Others	43	34	49	45.0
Total	3 958	2 955	3 170	7.3

Note: Percentage change calculated from unrounded data.

The declines in the October-November period are partly attributed to a continued inflow of maize from neighbouring countries, which have helped to bolster domestic availability, whilst stable informal exchange rates used at border crossings have further helped to contain price increases.

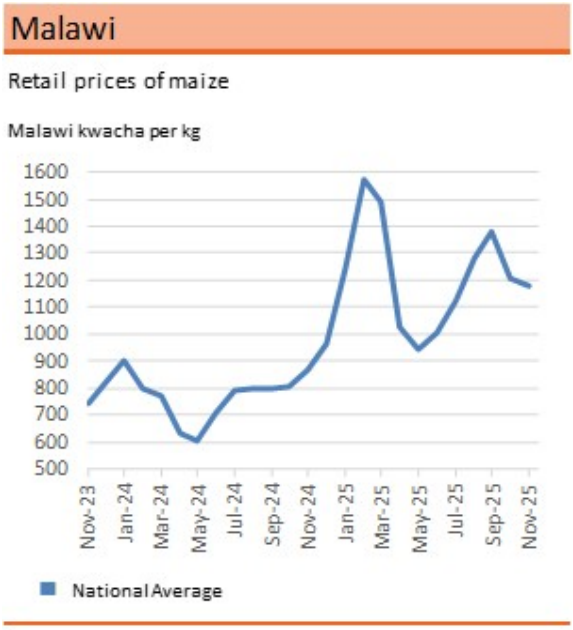
Import needs remain high in 2025/26 after two consecutive below-average harvests

Maize import needs are estimated at an above-average level in the 2025/26 marketing year (April/March) following the previous two consecutive below-average harvests that caused drawdowns in stocks. Given the upturns in production levels across most neighbouring countries in 2025, external supplies are available in the subregion and the country's needs are likely to be fully sourced from Mozambique, South Africa and Zambia.

Acute food insecurity declines but needs remain elevated in 2025/26

An estimated 4 million people are projected to face IPC Phase 3 (Crisis) or above levels of acute food insecurity between October 2025 and March 2026, the lean season, including approximately 8 000 people in IPC Phase 4 (Emergency). Although below the 5.7 million people classified in Phase 3 (Crisis) or above in the 2024/25 lean season, humanitarian needs remain high.

The current acute food insecurity situation is linked to several key factors. Below-average cereal production in 2025 has reduced food availability and eroded household stocks. Persistently high staple food prices, primarily due to supply shortfalls and compounded by depreciation of the Malawian kwacha that contributed to pushing up production and transportation costs, continue to limit poor households' ability to purchase food. At the same time, weak economic growth and overall high inflation rates are eroding real wages and constraining purchasing power, creating particularly difficult conditions for resource-constrained households.



This brief was prepared using the following data/tools:
FAO/GIEWS Country Cereal Balance Sheet (CCBS)
https://www.fao.org/giews/data-tools/en/.
FAO/GIEWS Food Price Monitoring and Analysis (FPMA) Tool
https://fpma.fao.org/.
FAO/GIEWS Earth Observation for Crop Monitoring
https://www.fao.org/giews/earthobservation/.
Integrated Food Security Phase Classification (IPC) https://www.ipcinfo.org/.
Agmet EO Indicators by NASA Harvest and GEOGLAM Crop Monitor
https://cropmonitortools.org/tools/agmet/.