



## GIEWS Country Brief Zimbabwe

Reference Date: 07-March-2017

### FOOD SECURITY SNAPSHOT

- Forecasts point to production recovery in 2017, but army worm outbreak and heavy rains likely to restrain bigger gains
- Maize imports rise in 2016/17 to boost domestic supplies following sharp production decrease in 2016
- Estimated 4.1 million people food insecure, but conditions expected to improve with 2017 harvest beginning in April

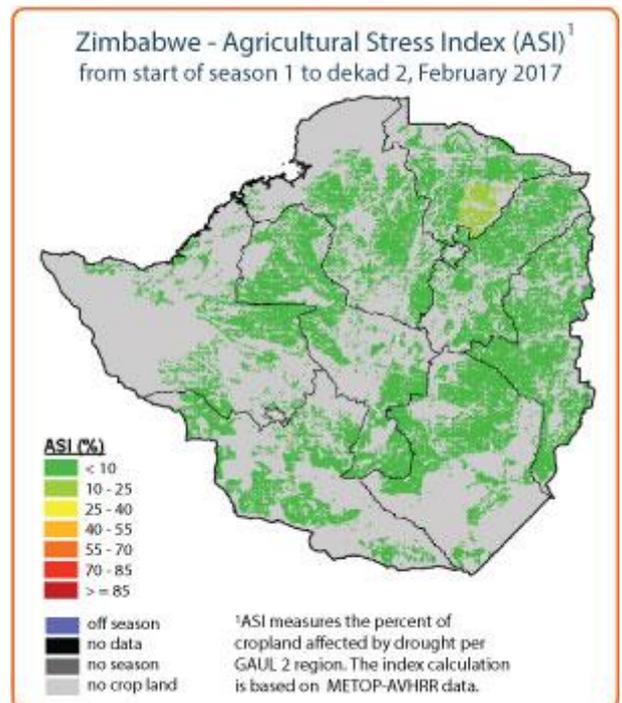
### Maize production in 2017 forecast to recover from 2016's drought-reduced output

Harvesting of the 2017 cereal crops is expected to commence in April, with the bulk of the maize crop to be harvested in May and June. Early production forecasts point to a recovery from last year's reduced output, but the harvest is not expected to exceed the five-year average. The more positive outlook this season mostly reflects wetter conditions, which are predicted to continue until harvesting. Additionally, an increase in the area planted to maize, estimated at a near-average level of 1.2 million hectares, is also anticipated to contribute to a larger output in 2017. However, although the above-average cumulative rainfall volumes since October 2016 have benefitted crop and pasture development, heavy rains have also resulted in localized flooding causing crop losses, while waterlogging is likely to constrain yield potentials in the affected areas, particularly for the late-planted crop that is more susceptible to the impact of excessive moisture. In addition, an outbreak of fall army worms, an invasive species to the subregion, is likely to also further limit year-on-year production gains; an estimated 130 000 hectares of maize have been affected.

Production of cash crops, mainly cotton and tobacco, is also foreseen to rise in 2017, mainly supported by an expansion in the sown area.

### Imports increase in 2016/17 to bridge larger national deficit

On account of the sharply reduced 2016 cereal harvest and minimal carryover stocks, the cereal maize requirement for the 2016/17 marketing year (April/March) was estimated to be close to 1 million tonnes (assuming an unchanged per caput



consumption rate). As of January 2017, approximately 0.7 million tonnes of maize was estimated to have been imported, the bulk of which originated from Mexico, South Africa and Zambia.

### Lower maize meal prices

The country experienced deflation in 2016, with an annual rate of -1 percent in December. Prices of maize meal declined in the first half of 2016 and had since remained stable through to the end of the year. The impact of the US dollar's strength (the main currency used in the country), which had contributed to lowering food prices, weakened in recent months due to an appreciation of South Africa's (a main trading partner) currency. However, the decline in maize prices in South Africa, which has supplied about 160 000 tonnes of maize since May 2016, has contributed to maintain stable prices. Liquidity constraints in the country had also dampened domestic demand and constrained economic performance, lessening inflationary pressure in 2016.

### Increased numbers of food insecure in 2016/17

Food security conditions deteriorated significantly in 2016/17, driven by the drought-reduced agricultural production, which followed an already poor 2015 agricultural campaign. The Zimbabwe Vulnerability Assessment Committee (ZimVAC) estimates that 4.07 million people (44 percent of the rural population) are food insecure in the current peak of the lean period, between January and March 2017, about 44 percent higher than the 2.83 million people estimated in the first quarter of 2016. Government and partner organizations are targeting the entire food insecure population for assistance, with both in-kind as well as cash-based programmes.

The Government declared a state of disaster on 2 March following the impact of the floods, which left an estimated 2 000 people homeless, while infrastructure damage was also reported; the most affected districts were in Matabeleland North. With weather forecasts indicating a continuation of above-average rains until May, there is a risk of further flooding.

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### Cereal production

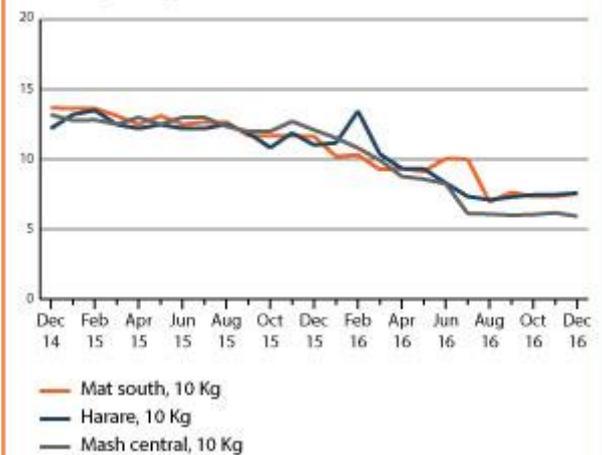
	2011-2015	2015	2016 estimate	change
	average			2016/2015
	000 tonnes			percent
Maize	1 083	742	512	-31
Sorghum	81	40	36	-10
Millet	52	27	29	7
Others	70	61	59	-3
<b>Total</b>	<b>1 287</b>	<b>870</b>	<b>636</b>	<b>-27</b>

Note: percentage change calculated from unrounded data.  
Source: FAO/GIEWS Country Cereal Balance Sheets

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### Retail prices of maize meal

US Dollar per 10 Kg



Source: ZIMSTAT