FOOD SECURITY SNAPSHOT

- Maize production in 2018 forecast at above-average level, but set to decline on yearly basis reflecting dry weather conditions in southern and central parts.
- National maize supplies forecast to be generally adequate in 2018/19 marketing year (April/March) on account of larger opening stocks and above-average output.
- Prices of maize remained mostly stable in 2018 and lower on yearly basis.
- Impact of dry weather on crop production expected to aggravate food security conditions in southern Gaza and Inhambane provinces.

Dry weather expected to cause decline in cereal production, but 2018 output still set to remain above average

Harvesting of the 2018 main summer season cereal crops is expected to conclude in late June.

Weather conditions during the cropping season have been mixed. Between November 2017 and April 2018, cumulative seasonal rains have been well below average in southern provinces of Gaza and Inhambane, particularly in the interior districts. By contrast, in central and northern provinces, despite a period of lower-than-normal rains in January, precipitation has been generally favourable. However, a combination of dry periods and heavy downpours in areas of the north and centre during the first quarter of 2018 resulted in some crop losses.

Fall Armyworm (FAW) infestations are likely to have caused damage to the maize crop, particularly as adequate control measures are too costly for small-scale farmers. However, the overall impact of FAW on national cereal production is likely to be small.

Mostly reflecting dry weather-reduced yields, total cereal production in 2018 is foreseen to decrease year-on-year, but remain above the previous five-year average.

Maize import requirements forecast to rise

The above-average maize output in 2017 enabled the country to build up its stocks in the 2017/18 marketing year (April/March). As a result, opening stocks in 2018/19 are estimated to be up by...
200,000 tonnes on a yearly basis, bolstering domestic availabilities.

However, import needs in 2018/19 are forecast to increase slightly on a yearly basis to a near-average level, mostly reflecting the foreseen production shortfalls in southern areas. The country normally imports around 100,000 tonnes of maize from South Africa; these imports mostly satisfy the consumption needs in the south, given its close proximity to South Africa compared to the main cereal-producing provinces in the north.

Maize prices remained broadly stable and lower on yearly basis

Prices of maize grain have remained broadly stable since mid-2017 and were well below their year-earlier levels as of May 2018. This situation largely reflects the good national supplies, while lower grain prices in South Africa and a generally stable exchange rate have also helped to temper inflationary pressure in 2018.

Prices of maize are expected to remain under downward pressure for the next months as new supplies from the 2018 harvest boost market availabilities.

Food security expected to worsen in southern provinces

Food security conditions in the interior districts of Gaza and Inhambane are expected to worsen in 2018 on account of the anticipated production decreases. Although most households in these areas are normally able to engage in a second season harvest, the poor summer seasonal rains have reduced water supplies and, consequently, lowered production prospects for secondary season crops. Similarly, conditions are likely to be stressed in northern and central parts that experienced crop losses due to the dry periods and heavy rainfall.

The generally lower year-on-year cereal prices are, however, aiding households’ access to food and preventing a further deterioration of conditions.

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