



## GIEWS Country Brief Malawi

Reference Date: 21-March-2017

### FOOD SECURITY SNAPSHOT

- Cereal production in 2017 forecast at near-average levels
- Imports of maize increase in 2016/17 marketing year to compensate for reduced 2016 harvest
- National average maize price declined at the start of 2017, but remained at high levels
- Food security situation expected to improve in 2017 on account of expected average harvest following sharp deterioration in 2016

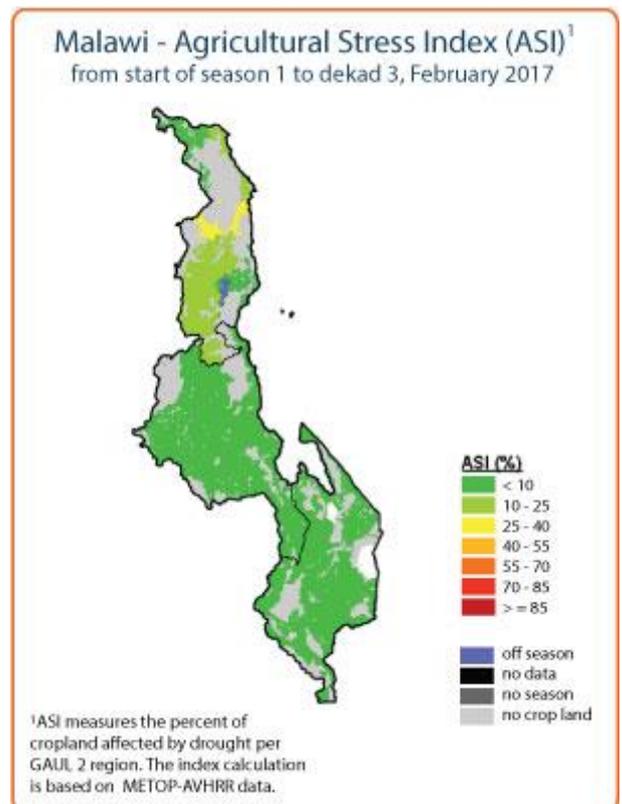
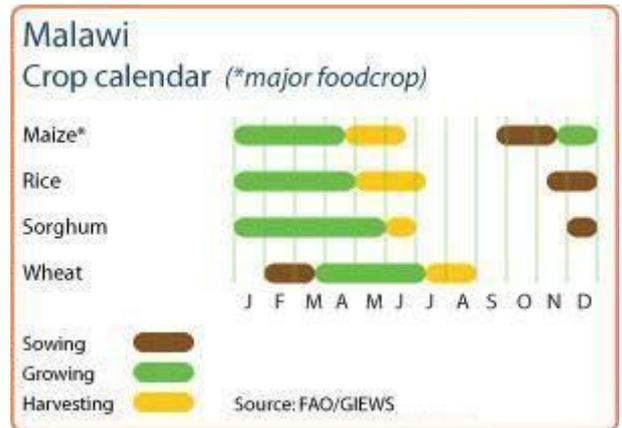
### Maize production in 2017 expected to rebound to average levels

Harvesting of the 2017 cereal crop is expected to commence next month. National production prospects are generally favourable and the 2017 maize harvest is expected to rebound from the previous year's drought-reduced level, with production preliminarily forecast at an about average level of 3.2 million tonnes. The anticipated recovery would mostly be on account of the wetter conditions this season that boosted vegetation conditions in cropped areas, implying a likely increase in yields in most parts of the country. However, in some northern areas, where the current seasonal rainfall volumes (October-February) have been below average, yields are expected to be constrained and production could decline in localized parts. In addition, a reduction in the use of fertilizer, localized flood damage and an outbreak of fall army worm (an invasive species), which reportedly caused minimal damage, are expected to prevent larger year-on-year production gains.

Regarding cash crops, tobacco production is forecast to fall reflecting lower prices in 2016 that instigated a contraction in 2017 plantings, while a moderate increase in cotton production is foreseen.

### Maize imports forecast to expand in 2016/17 marketing year

As a result of the reduced 2016 maize output, 34 percent below the previous five-year average, and significantly depleted stocks (household and public reserves), the national maize import needs in the 2016/17 marketing year (April/March) were estimated to have increased to approximately 0.7 million tonnes. In addition to formal imports, which the Government supported through an allocation of MWK 35.5 billion to procure maize, volumes of



informal imports were reported to have been above average in the current marketing year.

### Prices of maize declined

Maize grain prices fell in the first two months of 2017 reflecting the impact of humanitarian assistance and commercial imports that alleviated supply pressure. The recent declines pushed the national average maize price below its year-earlier near-record level as of February 2017, however, it was still well above the three-year average, mostly due to the tighter supply situation compared to previous years.

The Agriculture Development and Marketing Corporation (ADMARC), the Government's parastatal that procures and retails grain, is selling maize at its depots at a price of MWK 250 per kg.

The annual inflation rate has also declined and in January stood at just over 18 percent, its lowest level since May 2012.

### Food security conditions expected to improve in 2017 following sharp deterioration in 2016

As a result of the poor agricultural performance and higher food prices in 2016, the number of food insecure was estimated at 6.7 million, based on updated findings from the Malawi Vulnerability Assessment Committee's (MVACs) evaluation. The most affected districts are in the south and correspond to the areas that suffered the biggest impact from the drought conditions. In February 2017, the entire caseload of food insecure people were reported to have received food assistance.

On account of the favourable production outlook in 2017 and declining maize prices, food security conditions are expected to improve this year with the start of the harvest.

**Malawi**  
Cereal production

	2012-2016 average	2016	2017 forecast	change 2017/2016
	000 tonnes			percent
Maize	3 277	2 369	3 200	35
Rice (paddy)	113	87	120	38
Sorghum	75	50	90	80
Others	35	21	42	100
<b>Total</b>	<b>3 500</b>	<b>2 527</b>	<b>3 452</b>	<b>37</b>

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

