



GIEWS Country Brief Malawi

Reference Date: 27-January-2023

FOOD SECURITY SNAPSHOT

- **Low rainfall amounts at start of 2022/23 cropping season**
- **Adequate national maize supplies estimated in 2022/23**
- **Maize prices hit record highs in 2022, underpinned by weak currency and high global commodity prices**
- **Food insecurity worsens in early 2023**

Low rainfall amounts at start of 2022/23 cropping season

Planting of the 2023 cereal crop is expected to conclude soon, slightly later than normal following sparse rainfall in October 2022, normally the onset of the rainy season. Precipitation levels picked up in late November and December 2022, but cumulative amounts were still slightly below normal by the end of 2022, evidenced by remotely sensed data depicting moderately below-average vegetation conditions in most parts of the country. Strong winds and heavy rainfall were recorded in the Southern Region in late November, and these weather conditions gradually moved to central and northern districts in December, triggering localized flooding. The most affected districts were Salima (Central Region), Chikwawa and Nsanje (Southern Region).

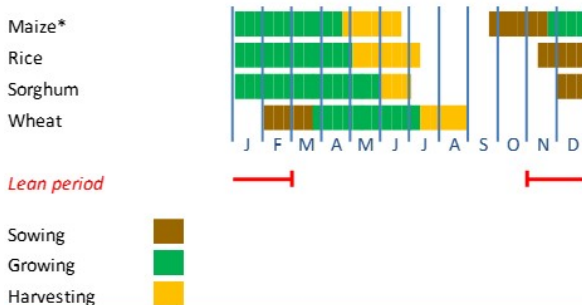
Weather forecasts for the January-to-March 2023 period indicate a higher-than-normal likelihood of average to above-average rainfall amounts, and these conditions are likely to boost soil moisture levels and foster a recovery in crop conditions. High prices of agricultural inputs may result in a reduction in fertilizer and pesticide application, with potentially adverse consequences for crop yields. Furthermore, there have been indications that there could be a cutback in maize plantings, as farmers switch to less input-intensive crops, including soybeans and groundnuts, to minimize production costs given the increased prices of agricultural inputs.

Cereal production in 2022 is estimated at 4 million tonnes, 4 percent above the five-year average. The overall good harvest reflects generally favourable precipitation during the second half of the rainy season, between January to April 2022, in the main cereal producing central and northern districts. The conducive weather conditions enabled farmers to replant crops that failed earlier in the season due to rainfall deficits in the

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Crop Calendar

(*major foodcrop)



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Cereal Production

	2017-2021 average	2021	2022 estimate	change 2022/2021
	000 tonnes			percent
Maize	3 584	4 582	3 717	-18.9
Rice (paddy)	131	147	138	-6.2
Sorghum	114	118	117	-1.2
Others	41	43	42	-1.2
Total	3 871	4 890	4 014	-17.9

Note: Percentage change calculated from unrounded data.

October-December 2021 period.

Adequate maize supplies estimated in 2022/23

Based on official production estimates, total maize production in the 2022/23 marketing year (April/March) is estimated to exceed domestic demand for a second consecutive year. Total cereal import requirements, mostly wheat, are forecast above the average, but virtually unchanged on a yearly basis, as a small drawdown of stocks is expected to help meet national consumption needs.

Maize prices hit record highs in 2022

The annual food inflation rate in November 2022 was estimated at 33 percent, 20 percentage points higher compared to the same month in 2021, albeit moderately down from the peak in October 2022. The key driver of inflationary pressure is the high global prices of food commodities and energy, coupled with the 25 percent devaluation of the national currency (Malawi kwacha) in May 2022 that amplified the impact of the elevated international prices.

At the commodity level, prices of maize grain, the country's main food staple, more than doubled in the 12 months to December 2022. Prices were highest in the structurally deficit southern districts, averaging about 10 percent above the prices in central and northern markets. Upward pressure on maize prices is likely to remain until at least the start of the next harvest period in April 2023.

Food insecurity worsens in early 2023

The latest Integrated Food Security Phase Classification (IPC) acute food security analysis indicates that about 3.8 million people (20 percent of the population) are estimated to face high levels of acute food insecurity (IPC Phase 3 [Crisis]) between January and March 2023. This figure is more than double the number in the corresponding months of 2022. The high food prices are the key reason for the deterioration in food insecurity, which, in the absence of a substantial increase in incomes, are severely constraining households' economic access to food. Production shortfalls in southern districts in 2022, areas that have the highest prevalence of food insecurity, are a further contributing factor. The southern districts also have the highest proportion of households facing severe chronic food insecurity, inferring a general lack of resources and adequate coping capacities to respond effectively to short-term shocks.

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This brief was prepared using the following data/tools:

FAO/GIEWS Country Cereal Balance Sheet (CCBS) <https://www.fao.org/giews/data-tools/en/>.

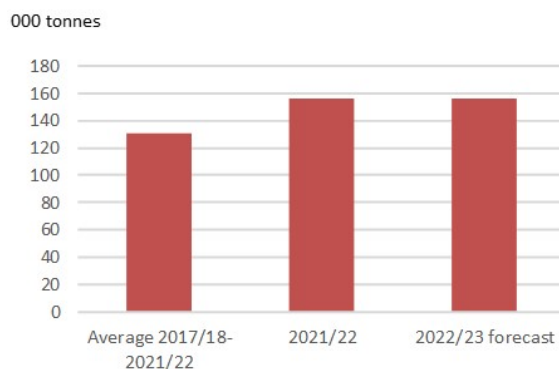
FAO/GIEWS Food Price Monitoring and Analysis (FPMA) Tool <https://fpma.fao.org/>.

FAO/GIEWS Earth Observation for Crop Monitoring <https://www.fao.org/giews/earthobservation/>.

Integrated Food Security Phase Classification (IPC) <https://www.ipcinfo.org/>.

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Cereals Imports



Notes: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

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Retail maize prices

