



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).

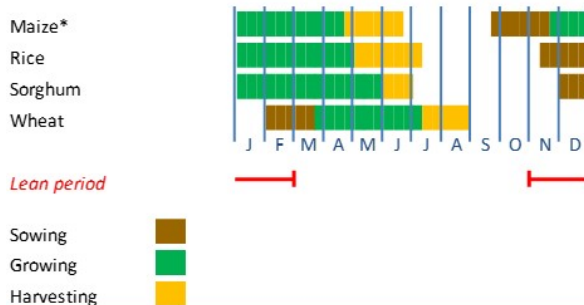
Weather forecasts for the January-to-March 2023 period indicate a higher-than-normal likelihood of average to above-average rainfall amounts, and these conditions are likely to boost soil moisture levels and foster a recovery in crop conditions. High prices of agricultural inputs may result in a reduction 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

Malawi

Crop Calendar

(*major foodcrop)



Malawi

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/>.

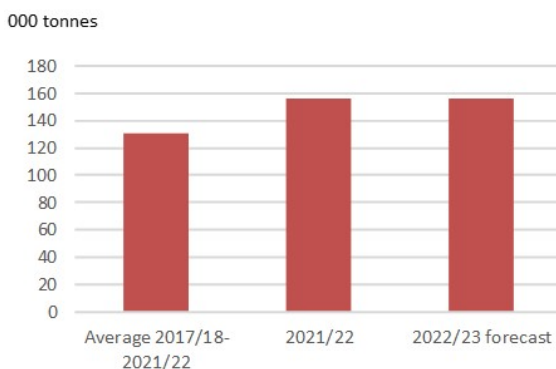
FAO/GIEWS Food Price Monitoring and Analysis (FPMA) Tool <https://fpma.fao.org/>.

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

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

Malawi

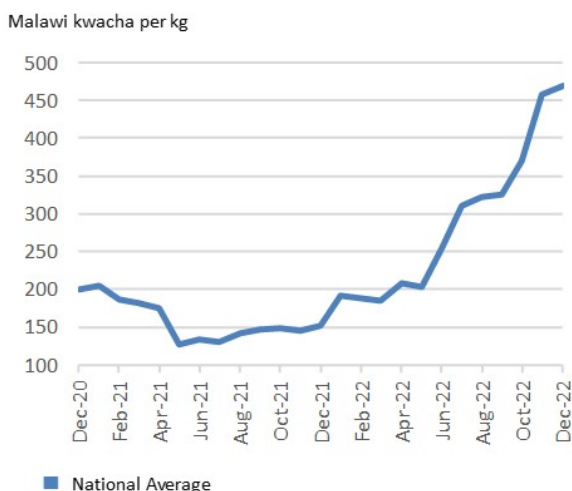
Cereals Imports



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

Malawi

Retail maize prices





GIEWS Country Brief Malawi

Reference Date: 20-July-2022

FOOD SECURITY SNAPSHOT

- Cereal production forecast at 4 million tonnes in 2022, an above-average level, although with reduced harvests recorded in southern districts
- Adequate national maize supplies forecast in 2022/23, with ample stocks limiting import requirements
- Maize prices at high levels due to tight supplies; currency devaluation and elevated global prices seen to exert strong inflationary pressure in 2022
- Food insecurity conditions foreseen to worsen in late 2022, particularly in Southern Region

Above-average cereal production in 2022, despite yearly decline

Harvesting of the 2022 main season cereal crops is complete and the minor winter wheat crop is expected to be harvested by September.

National cereal production in 2022 is forecast at 4 million tonnes, about 4 percent above the five-year average, although nearly 0.9 million tonnes down from the bumper output of 2021. The overall good harvest reflects generally favourable precipitation in the second half of the rainy season, between January to April 2022, in the main cereal producing central and northern districts. These conducive weather conditions enabled farmers to replant crops that were written off earlier in the season due to rainfall deficits in the October-December 2021 period and resulted in an overall improvement in crop conditions.

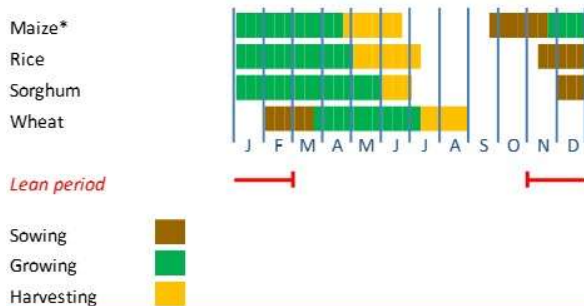
Shortfalls in production were estimated in the minor cereal-producing southern districts, where rainfall was poorly distributed temporally and cumulative seasonal amounts were below average. The impact of Cyclone Ana, which made landfall in January 2022, also caused further crop damage and losses in the Southern Region.

At the national level, limited access to and a generally late application of fertilizers, as well as pest infestations, including Fall armyworm, contributed to containing yields at near-average levels. A small reduction in the area planted was a further factor that caused the lower year-on-year harvest.

Malawi

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FEWS NET.

Malawi

Cereal Production

| | 2017-2021 | 2021 | 2022 | change |
|--------------|--------------|--------------|--------------|--------------|
| | average | | | 2022/2021 |
| | 000 tonnes | | | percent |
| Maize | 3 584 | 4 582 | 3 717 | -18.9 |
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| Total | 3 871 | 4 890 | 4 014 | -17.9 |

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Adequate cereal supplies estimated in 2022/23

Based on official production estimates, total cereal supplies in the 2022/23 marketing year (April/March) are estimated to exceed domestic demand for a second consecutive year. Import requirements are forecast at an average level and virtually unchanged on a yearly basis, as a drawdown of stocks is expected to help meet national consumption needs.

The devaluation of the currency could increase the attractiveness of Malawian grains in neighbouring countries, supporting a potential increase in informal exports, particularly in consideration of reduced outputs across most Southern African countries.

Prices of key staple foods high and rising

As of May, the national average price of maize grain was estimated at MWK 204/kg, about 60 percent higher year on year. Prices of maize were highest in southern districts, notably in Nsanje, where prices exceeded the national average by 10 percent. The high prices, particularly in the south, largely reflect the year-on-year decline in production.

Correspondingly, the annual food inflation rate was estimated at 26 percent in May compared to 11 percent in the corresponding month of 2021. The spike in global prices of food and energy (with Malawian fuel prices having been revised upward in April and June as a result), underpinned by the war in Ukraine, has put additional pressure on domestic food prices. Moreover, the national currency (Malawi kwacha) was devalued by 25 percent in May, in part owing to dwindling foreign currency reserves. The lower value of the Malawi kwacha is expected to intensify the spill-over effects of high international prices and cause further inflationary pressure in 2022, with detrimental impacts on households' economic access to food.

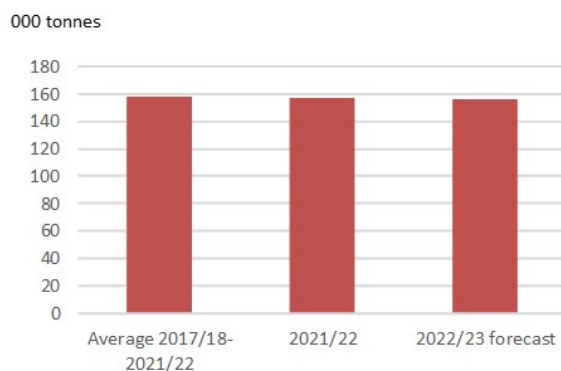
Food insecurity expected to worsen in 2022/23

The Integrated Food Security Phase Classification (IPC) acute food security analysis for 2022/23 is not yet publicly available. However, the prevalence of food insecurity is likely to increase in the second half of 2022 and early 2023 mainly due to the high food prices and low cereal production in southern districts. According to the latest IPC acute food insecurity analysis issued in December 2021, about 1.65 million people were estimated to need humanitarian assistance between January and March 2022. The highest rates of acute food insecurity were reported in the southern districts of Balaka, Chikwawa and Nsanje, where 15 percent of the population was facing IPC Phase 3 (Crisis). These three districts also have the highest proportion of households facing severe chronic food insecurity, meaning they are highly vulnerable to shocks and are consequently more likely to experience acute food insecurity when shocks do occur.

In addition to the adverse impacts of the low cereal harvest in the south and high food prices across the country, a third factor that is foreseen to contribute to a worsening of food insecurity conditions is the forecasted slow economic growth in 2022, underpinned by the lingering effects of the COVID-19 pandemic and the country's elevated debt levels. The sluggish economic growth is expected to limit a recovery in households' incomes and further aggravate food access constraints.

Malawi

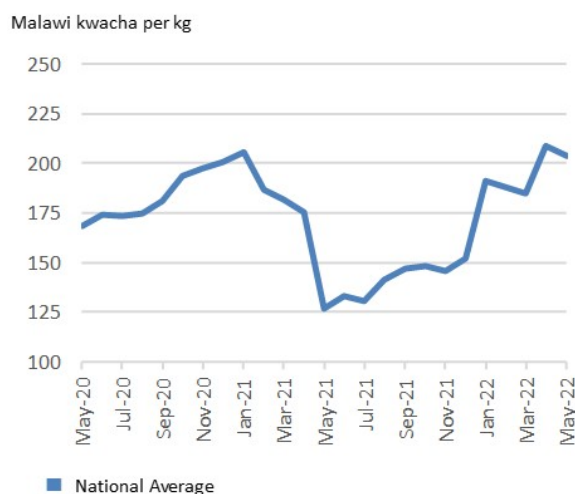
Cereals Imports



Notes: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).
Source: FAO/GIEWS Country Cereal Balance Sheets.

Malawi

Retail maize prices



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

Anticipatory actions can help prevent further impact on livelihoods, if implemented timely. FAO will continue working with the government and partners to facilitate the provision of information, early warning messages and technical support in the possible scenario of dry spells during the main planting season in the 2022/23 cropping season.

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GIEWS Country Brief Malawi

Reference Date: 08-February-2022

FOOD SECURITY SNAPSHOT

- Early seasonal rainfall deficits, coupled with floods in south, sharply curb production outlook of 2022 cereal crops
- Large domestic maize stocks could help buffer supplies in forthcoming 2022/23 marketing year amid forecast of shortfall in production
- Maize prices rose seasonally in late 2021, price spikes could occur in flood-affected southern districts
- Food insecurity conditions expected to deteriorate due to flood impact in Southern and Central regions, with more than 190 000 households reported to have been affected

Cereal production in 2022 likely to fall to near-average level

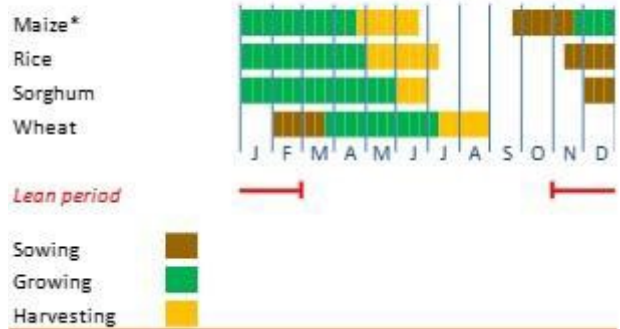
Plantings of the main 2022 season cereal crops concluded in early January, with some delay due to a late onset of seasonal rainfall during the sowing period. In contrast to preliminary weather forecasts, the cumulative rainfall amount between October and December 2021 was below average and, temporally, the distribution of rains was uneven with the bulk of rainfall concentrated in just a few weeks. The erratic distribution of rains led to a failure of the first plantings in several areas, resulting in a second round of plantings where feasible. However, access and availability constraints to seeds, limited farmers' capacity to replant. The estimated acreage of maize, the primary food staple is, therefore, expected to decline on a yearly basis to a near-average level in 2022.

In January 2022, substantial rainfall was recorded across the country, particularly in the south on account of the passing of tropical storm Ana during the last week of the month. The storm caused flooding in several districts, with early satellite analysis indicating large swathes of flooded land along the Shire river as well as around Lake Chilwa. In particular, the southern districts of Chikwawa, Nsanje, Phalombe and Mulanje were the most affected by the floods. Although crops grown in these districts contribute to less than 10 percent of the total national cereal output, the reduced harvests of millet and sorghum are expected to have a significant impact on food security of local households.

Malawi

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Malawi

Cereal Production

| | 2016-2020 average | 2020 | 2021 estimate | change 2021/2020 |
|--------------|-------------------|--------------|---------------|------------------|
| | 000 tonnes | | | percent |
| Maize | 3 142 | 3 692 | 4 580 | 24.1 |
| Rice (paddy) | 119 | 143 | 147 | 3.2 |
| Sorghum | 100 | 138 | 120 | -13.2 |
| Others | 37 | 47 | 40 | -13.7 |
| Total | 3 398 | 4 020 | 4 888 | 21.6 |

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Even prior to the storm, an estimated 160 000 hectares of crops in Southern Region were reported to have been affected by poor rains during the start of the season and suffered from wilting.

Central and Northern regions were less affected by the tropical storm and the heavy rains have helped to reduce seasonal moisture deficits and instigated an upturn in vegetation conditions in cropped areas. Nonetheless, in late January, remote sensing vegetation indicators showed lower values compared to the ten-year average, inferring generally poor crop conditions.

In consideration of the overall poor rains and the impact of the tropical storm, cereal production is forecast to decline in 2022 from the bumper outturn in 2021 and is expected to fall slightly below the five-year average.

Large stocks could help to buffer cereals supplies in 2022/23 marketing year

Total cereal production in 2021 was estimated at a record high level of 4.9 million tonnes and current supplies in the 2021/22 marketing year (April/March) are estimated to exceed domestic demand by a significant margin. The plentiful supply situation is expected to result in a build up of maize stocks to a well above-average level. These large stocks could help cushion a potential shortfall in production in the forthcoming 2022/23 marketing year, at the national level. There are, however, likely to be large regional discrepancies in supplies and a significant supply deficit is foreseen in the Southern Region, given the negative effects of tropical storm Ana on crop production.

Prices of maize increased seasonally, but remained lower year on year

Although prices of maize grain have been rising seasonally since May 2021, the national average price in December 2021 was 24 percent lower on a yearly basis, reflecting the current ample supply situation. Prices of maize were highest in southern markets and the impact of the recent tropical storm on the supply chain could result in temporary price spikes. Households in the Southern Region are also the most reliant on [market supplies](#).

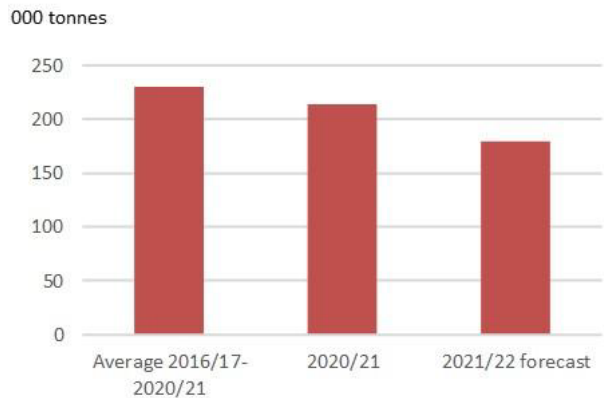
Food insecurity likely to worsen in southern districts, although conditions at national level have improved overall

The [latest IPC analysis](#), issued in December 2021, revised upward the number of food insecure people between January and March 2022 to 1.65 million, citing low agricultural prices of cash crops and an earlier-than-expected depletion of food stocks in Balaka District of Southern Region for the increase. This number is, however, still about 37 percent lower than the estimate in same period in 2021, reflecting the positive impact of the large 2021 harvest and the comparatively low retail prices of maize, the primary food staple.

The highest rates of food insecurity are assessed to be in the southern districts of Balaka, Zomba City, Chikhwawa and Nsanje, where 15 percent of the population is estimated to be facing IPC Phase 3 (Crisis). Households in these districts were already expected to face significant food gaps prior to the passing of tropical storm Ana in January 2022 that had an adverse impact

Malawi

Cereals Imports

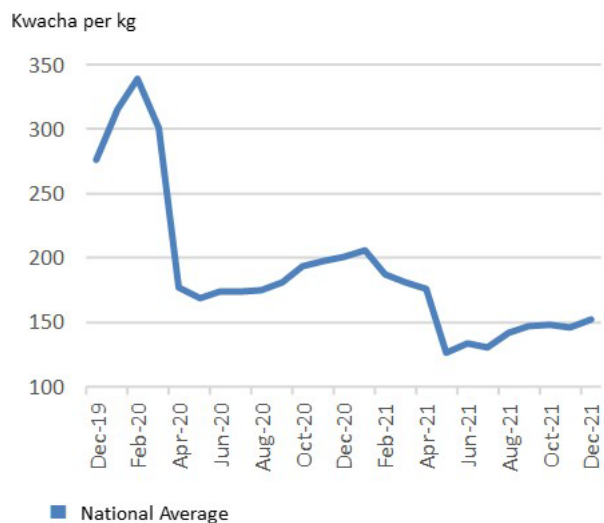


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Malawi

Retail maize prices



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

on the agriculture sector and access to other sources of livelihoods, likely compounding the current conditions and causing a further worsening of food insecurity. Preliminary estimates from the Government indicate that at least 190 000 households have been affected the by the storm in Central and Southern regions.

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GIEWS Country Brief Malawi

Reference Date: 25-October-2021

FOOD SECURITY SNAPSHOT

- Early production prospects for 2022 cereal crops favourable, supported by forecasts of average to above-average seasonal rainfall
- Large 2021 maize harvest boosts domestic supplies, with increase in national stocks and expected moderate growth in exports
- Maize prices rise seasonally, but remained lower year on year as of September 2021
- Food security improves in 2021/22, but concerns remain in southern districts

Early production outlook favourable for 2022 cereal crops

Plantings of the main 2022 season cereal crops is underway and is expected to continue until the end of December. Harvesting is anticipated to start from late March 2022.

Scattered and light rainfall has been observed since the beginning of October, which normally marks the start of the rainy season. Although early rains have been sparse, remote sensing data indicates average to above-average soil moisture levels across the country, reflecting the effects of a good rainfall season in 2020/21 and, consequently, planting operations are expected to continue as normal. For the following months of the season, weather forecasts point to higher probability of average to above-average rainfall amounts, underpinning a favourable production outlook for the 2022 cereal crops.

Large 2021 harvest boosts domestic supplies

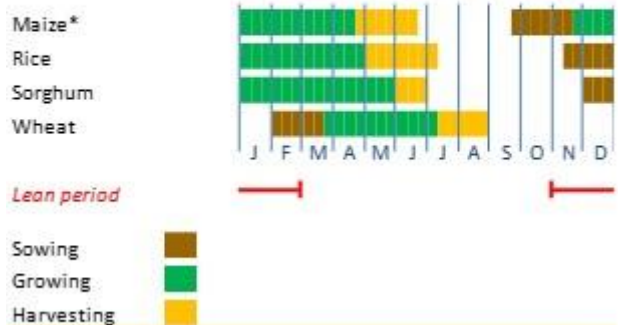
Total cereal production in 2021 is estimated at a record high level of 4.9 million tonnes. The bumper output mostly reflects conducive weather conditions that boosted yields and encouraged farmers to increase plantings. In addition, the implementation of the government's Affordable Inputs Programme, which provided access to subsidized seeds and fertilizers for 3.8 million smallholder farmers, also supported the production upturn in 2021.

Reflecting the record harvest, national maize supplies are estimated to exceed domestic demand by a significant margin in the 2021/22 marketing year (April/March). Consequently, national stocks are forecast to increase to a well above-average level.

Malawi

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Malawi

Cereal Production

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Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Exports are also foreseen to rise, but only moderately, as the bumper outputs obtained throughout Southern Africa will limit the export opportunities within the subregion. Imports of cereals, mostly wheat, are forecast at a below-average level in 2021/22, on account of the large domestic supplies.

Lower year on year maize prices

Prices of maize grain have been rising seasonally since May, but, reflecting the ample supply situation, the national average price in September 2021 was nearly 20 percent lower than a year before. Although the plentiful supplies are likely to curb inflationary pressure on food prices in the forthcoming months, the weakening national currency, which lost about 10 percent of its value against the United States dollar between November 2020 and October 2021, is expected to exert some upward pressure on food prices, particularly for imported commodities such as wheat.

Improvements in food security in 2021/22

Based on the latest IPC analysis, released in August 2021, an estimated 1.49 million people are projected to be food insecure and in need of humanitarian assistance between October 2021 and March 2022. This number is about 40 percent lower than the estimate in same period in 2020/21, reflecting the positive impact of the large harvest and the low prices of maize, the main food staple. However, the negative effects of the COVID-19 pandemic, especially the slowdown in economic activities and subsequent cuts to households' incomes, have constrained improvements in the food security situation.

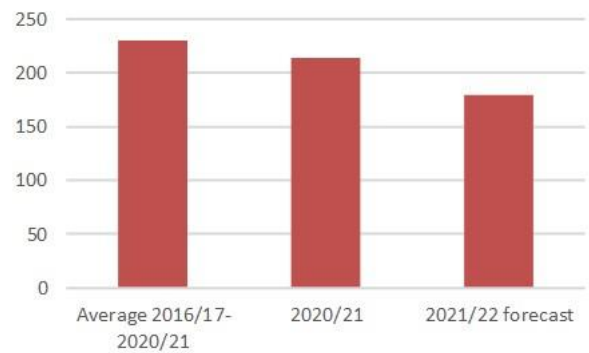
Most of the country has been classified in IPC Phase 2 (Stressed), except for the southern districts of Chikhwawa and Nsanje, where maize production decreased year on year in 2021 and 20 percent of the population is assessed to be facing IPC Phase 3 (Crisis). Households in these districts are likely to experience significant food gaps early next year, during the peak of the lean season.

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Malawi

Cereals Imports

000 tonnes

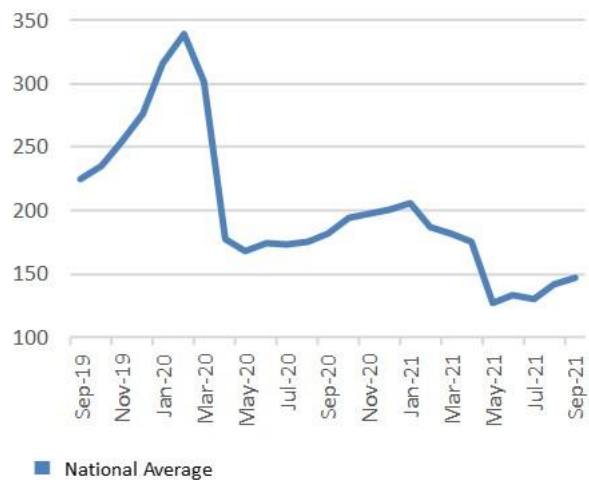


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).
Source: FAO/GIEWS Country Cereal Balance Sheets.

Malawi

Retail maize prices

Kwacha per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Malawi

Reference Date: 25-March-2021

FOOD SECURITY SNAPSHOT

- Cereal production in 2021 forecast at bumper high
- Supply outlook boosted by favourable production expectations
- Cereal imports below average in 2020/21 marketing year
- Lower year on year maize prices
- High prevalence of food insecurity, but improvements anticipated from April onwards

Cereal production in 2021 forecast at bumper high

Harvesting of the main 2021 season cereal crops will start in April and aggregate production is expected to surpass the above-average outturn of the previous year.

Since the start of the cropping season in October 2020, rainfall has been well distributed and cumulative amounts have been more than adequate to meet the water requirements of maize crops, the principal grain grown in the country. Reflecting the favourable rainfall conditions, remote sensing indexes depicted healthy vegetation conditions in most cropped areas at the beginning of March 2021, inferring a high likelihood of above-average yields at the national level. Excessive amounts of rainfall in some areas of Central and Northern regions may have stunted crop growth and had a negative effect on yields. Dry spells in some parts of Southern Region could also limit yield potential. However, these localized adverse weather events are not anticipated to have a significant impact on the aggregate national output.

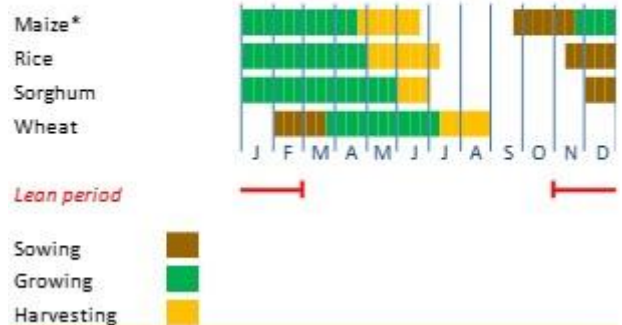
The area planted to maize is estimated to have increased in 2021, further supporting the favourable production outlook. The upturn in maize sowings reflects the favourable weather conditions during the planting period and the roll-out of the Government's Affordable Inputs Programme for the 2020/21 cropping season, which provided access to subsidized seeds and fertilizers for 3.8 million smallholder farmers.

Overall, maize production is foreseen to reach at least 4 million tonnes in 2021, compared to the 3.7 million tonnes harvested in 2020.

Malawi

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Malawi

Cereal Production

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| Total | 3 397 | 4 018 | 4 407 | 9.7 |

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

Supply outlook boosted by favourable production expectations

Based on the current production expectations for the 2021 harvest, domestic maize supplies in the 2021/22 marketing year (April/March) are forecast to be more than sufficient to cover national consumption needs and to enable a build-up of stocks. Maize exports are also expected to increase in 2021/22, following the recent lifting of the maize export ban. The Government announced to issue export licences for 350 000 tonnes. However, crop prospects are also favourable in neighbouring countries and bumper harvests elsewhere in the subregion are likely to limit export opportunities.

Import requirements of wheat and rice are foreseen at 225 000 tonnes in the 2021/22 marketing year, a slight year-on-year increase as production is not expected to keep pace with population growth and consumption needs.

Lower year on year maize prices

Interrupting a rising trend that started in June 2020, the national average price of maize grain decreased in February 2021 and was about 45 percent lower year on year. The lower price is mostly attributed to the ample supply situation and prospects of an above-average annual output in 2021, which is likely to also help contain seasonal price increases later in the year. At the subnational level, prices were higher in southern districts compared to the markets in the centre and north, reflecting the lower levels of production in the south.

High prevalence of food insecurity, but improvements anticipated from April onwards

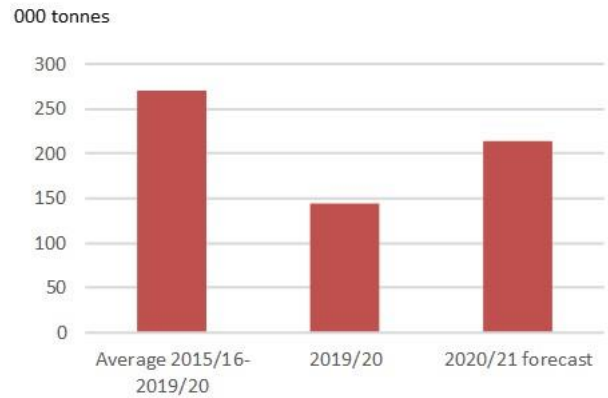
Based on the latest IPC assessments, released in January 2021, approximately 2.6 million people are estimated to be food insecure and in need of humanitarian assistance until the end of March, prior the main harvest period. Nearly 80 percent (about 2 million people) of this population is located in rural areas and mostly in southern districts. The national figure marks a deterioration compared to the previous year, when about 1.8 million people in rural areas were assessed to be food insecure. The effects of the COVID-19 pandemic have been a key factor that has worsened food insecurity in 2021.

Whilst the national economy and households' incomes are expected to recover slowly from the impacts of the pandemic, the expected improved cereal supply situation from April onwards is anticipated to have a significant positive effect on the food security situation. Prices of maize could also continue to fall, to the benefit of consumers and partly abating the effects of income losses due to the COVID-19 pandemic.

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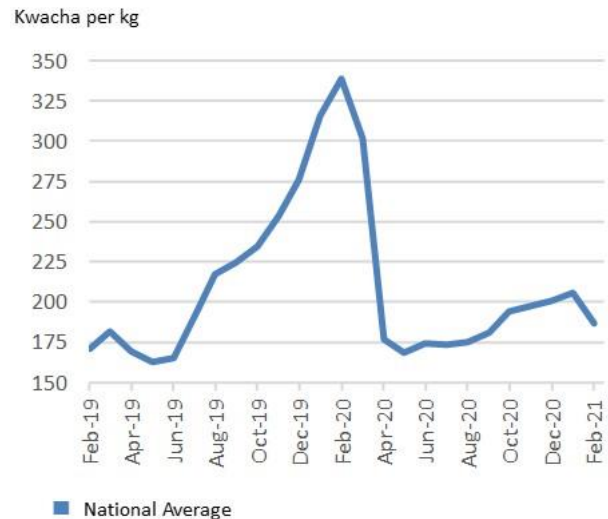
Cereals Imports



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).
Source: FAO/GIEWS Country Cereal Balance Sheets.

Malawi

Retail maize prices



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Malawi

Reference Date: 06-November-2020

FOOD SECURITY SNAPSHOT

- Planting of 2021 cereals ongoing under generally favourable weather conditions
- Large cereal output attained in 2020
- Cereal imports below average in 2020/21 marketing year
- Lower year-on-year maize prices
- Prevalence of food insecurity increased due to effects of COVID-19 pandemic

Planting of 2021 cereal crops ongoing under generally favourable weather conditions

Planting of the 2021 cereals crops is underway and is expected to be finalized by the end of December 2020, with the harvest set to take place from the second quarter of 2021.

Heavy rainfall was recorded at the start of the cropping season in October 2020 and although this caused some localized floods and delays to planting operations, the abundant precipitation boosted soil moisture levels and had an overall positive impact on early crop development. Weather forecasts for the November 2020-January 2021 period point to a slightly higher-than-normal probability of reduced rainfall in central and southern districts, a factor that could limit crop productivity.

To ameliorate farmers' access to agricultural inputs, particularly in the context of the pandemic-induced economic downturn and consequently lower incomes, the Government is implementing the Affordable Inputs Programme (AIP). This intervention aims to provide 4.28 million smallholder farmers with access to fertilizers at a fixed subsidized price of MWK 4 495 per 50 kg, while farmers would also pay a subsidized price of MWK 2 000 for a 5-7 kg bag of seeds (either maize, rice or sorghum). In the previous cropping season, an estimated 0.9 million farmers were targeted with an input subsidy scheme.

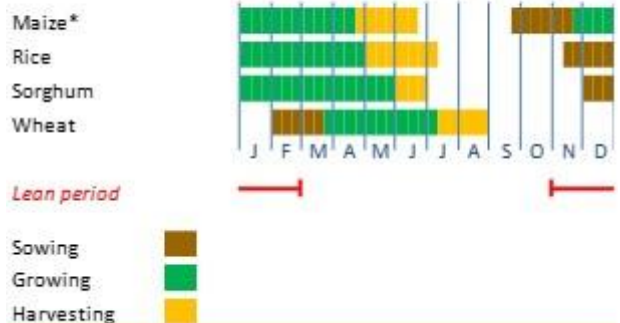
Large cereal output attained in 2020

Cereal production in 2020 is estimated at 4.1 million tonnes, 26 percent higher than the five-year average. Most of this output is comprised of maize, with the harvest estimated at 3.78 million tonnes. The bumper output is the result of an above-average planted area and high yields, on account of favourable weather conditions.

Malawi

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Malawi

Cereal Production

| | 2015-2019 average | 2019 | 2020 estimate | change 2020/2019 |
|--------------|----------------------|-------|------------------|---------------------|
| | 000 tonnes | | | percent |
| Maize | 2 959 | 3 392 | 3 692 | 8.8 |
| Rice (paddy) | 113 | 134 | 147 | 10.0 |
| Sorghum | 89 | 137 | 141 | 3.1 |
| Others | 34 | 46 | 50 | 8.1 |
| Total | 3 194 | 3 709 | 4 030 | 8.7 |

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Cereal import requirements below average in 2020/21

Reflecting two consecutive years of large cereal outputs, import requirements are estimated at a below-average level of approximately 200 000 tonnes in the 2020/21 marketing year (April/March). Most of this quantity is rice and wheat, which are produced in relatively small quantities compared to local needs.

Although national cereal stocks are also estimated to increase in 2020/21, on account of the bumper harvest, purchases of maize by the Government to buffer domestic strategic reserves have so far fallen short of the targets. This could limit the ability of the Government to provide subsidized maize during the lean period, typically starting in January.

Lower year on year maize prices

Retail prices of maize grain, the primary food staple, have remained generally stable since the start of the harvest in April 2020, rising by only 9 percent in the months up to October, compared to 39 percent in the same period in 2019. On a yearly basis, retail prices were also lower, owing to the adequate supply situation. At the subnational level, prices were generally higher in southern districts compared to the markets in the centre and north, reflecting the lower levels of production in the south.

Prevalence of food insecurity increased due to effects of COVID-19

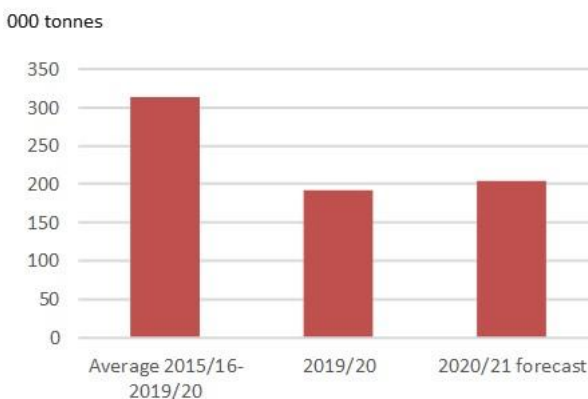
Based on the latest IPC assessments conducted in mid-2020, 2.6 million people are estimated to be food insecure and in need of humanitarian assistance until March 2021, prior to the main harvest period. Nearly 80 percent (2.03 million people) of this population is located in rural areas and mostly in southern districts. The national figure marks a deterioration compared to the previous year, when 1.8 million people in the rural areas were assessed to be food insecure.

Although cereal production increased in 2020, resulting in average to above-average staple food supplies at the household level, the effects of the COVID-19 pandemic have driven up the current rates of food insecurity, particularly among the urban households which likely experienced more extensive job and income losses. In the rural areas, notably in the southern districts of Nsanje, Neno and Balaka, localized weather shocks that caused shortfalls in cereal production in 2020 are also key factors that stressed food insecurity. In addition, the high prices of maize grain during the last year in the south worsened the access to food. According to recent data from the Emergency Agriculture and Food Security Surveillance System (EmA-FSS), a survey conducted jointly by the Government and FAO, households in the south are also more reliant on food purchases and this factor is expected to exacerbate the effects of high grain prices on households' food security.

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Malawi

Cereals Imports

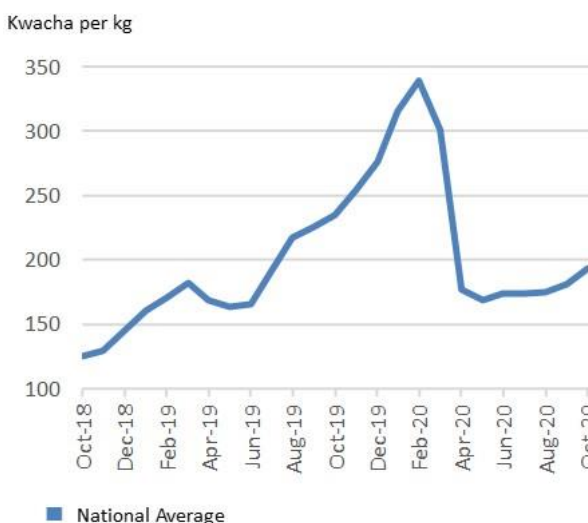


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Malawi

Retail maize prices



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Malawi

Reference Date: 03-August-2020

FOOD SECURITY SNAPSHOT

- Cereal production in 2020 estimated at bumper level, helping to bolster households' food supplies and keeping national import requirements at below-average level in 2020/21
- Prices of maize decreased seasonally from March 2020, but remained higher on yearly basis as of June
- Estimated 1.9 million people in need of food assistance in first quarter of 2020; food insecurity conditions likely to worsen due to effects of COVID-19

Cereal production in 2020 estimated at bumper level

Harvesting of the 2020 maize crop, which accounts for the bulk of the country's cereal output, concluded in June and production is officially estimated at 3.7 million tonnes, about 25 percent higher than the five-year average. The large output is the result of an above-average planted area and high yields, underpinned by favourable weather conditions. Reports from the country indicate an increased use of fertilizers and hybrid seeds, supported by Government-funded subsidy programmes, which have supported the increase in crop productivity. Production of other cereal crops, including paddy and sorghum, are also estimated to have increased in 2020. Overall, the total cereal output is estimated at a well above-average level of 4 million tonnes.

Looking further ahead to the 2020/21 cropping season, the Government announced an increase in the number of households that will benefit from the input subsidy programme, up from 0.9 million in the 2019/20 season to 3.5 million.

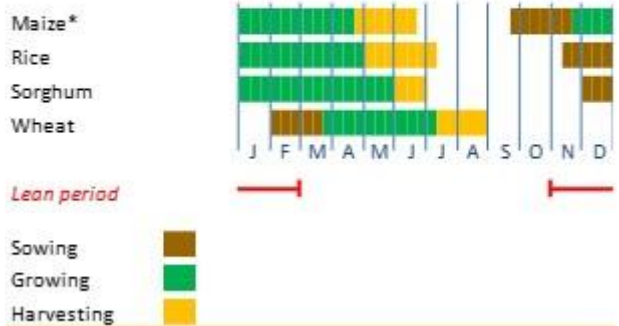
Cereal import requirements below average in 2020/21

The aggregate cereal import requirement in the 2020/21 marketing year (April/March) is estimated at about 185 000 tonnes, virtually unchanged from the previous year's low level and 40 percent below the previous five-year average. The reduced volume reflects two years of above-average maize harvests in 2019 and 2020, which have enabled the country to bolster stocks.

Malawi

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Malawi

Cereal Production

| | 2015-2019 | 2019 | 2020 | change |
|--------------|--------------|--------------|--------------|------------|
| | average | | | forecast |
| 000 tonnes | | | | |
| Maize | 2 959 | 3 392 | 3 700 | 9.1 |
| Rice (paddy) | 113 | 134 | 147 | 10.0 |
| Sorghum | 89 | 137 | 140 | 2.1 |
| Others | 34 | 46 | 51 | 11.1 |
| Total | 3 194 | 3 709 | 4 038 | 8.9 |

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Prices of maize fell steeply from March 2020

Retail prices of maize declined significantly between March and April from their all-time highs in February, mainly reflecting the boost to market supplies from the then ongoing harvest. In May 2020, prices of maize levelled off and, as of June 2020, they were slightly above their year-earlier values.

In early April, the Government announced an increase in the minimum farmgate price for maize grain. The revised price was set at MWK 200 per kg compared to MWK 180 per kg in the previous year.

Prevalence of food insecurity expected to increase due to effects of COVID-19

According to the last official estimates from SADC, an estimated 2.7 million people are assessed to be food insecure in 2020, of which 1.9 million live in rural areas and the remaining 800 000 people live in urban areas. This level is similar to the previous year. The high prevalence of food insecurity is mainly associated with the direct and indirect effects of the COVID-19 pandemic, which are expected to curtail access to food, through both income losses associated with the economic slowdown and disruptions to the food supply chains.

While a comprehensive assessment of the impacts of the COVID-19 pandemic on food security is still unavailable, the Ministry of Agriculture, partnering with FAO, collected data from farming households in April and May 2020 in 18 districts across the country and indicated that about 35 percent of the respondents have resorted to negative coping strategies in an attempt to try and maintain a stable food consumption during the COVID-19 emergency. In addition, according to the results obtained from the Food Insecurity Experience Scale survey, 66 percent of the farmer households were estimated to be moderately or severely food insecure, of which 20 percent attributed their limited access to food to the effects of the COVID-19 pandemic. A higher prevalence of the food insecurity experience and resorting to negative coping strategies was reported in southern districts, mirroring the results from the earlier IPC analysis.

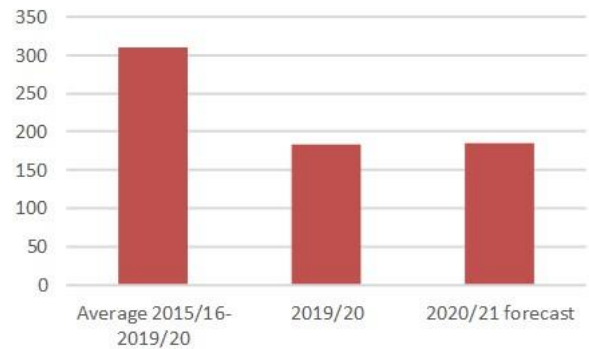
As a measure to prevent a deterioration in food security conditions, the Government disbursed a one-off grant of MWK 28 000 (USD 40) to nearly 300 000 rural households, aiming to bolster their ability to access food during the March to June period. For the July to October 2020 period, the amount disbursed to each rural household will be doubled. Regarding the urban population, the Government also announced a cash transfer programme targeting 185 000 households in the second half of 2020, which will deliver a monthly MWK 35 000 (USD 50) for four months.

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Malawi

Cereals Imports

000 tonnes



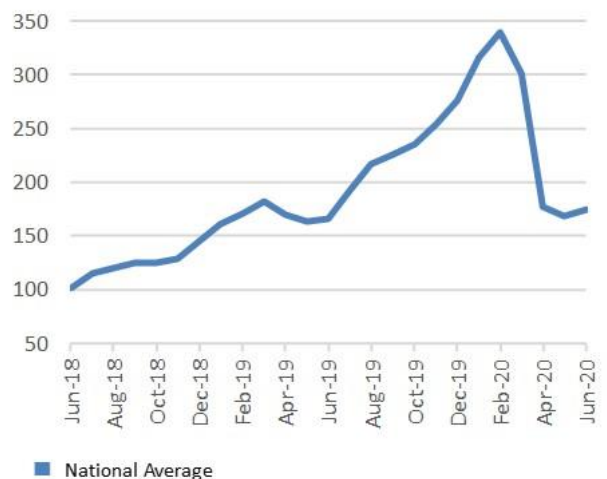
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Malawi

Retail maize prices

Kwacha per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Malawi

Reference Date: 22-April-2020

FOOD SECURITY SNAPSHOT

- Maize production in 2020 forecast to exceed five-year average for second consecutive year
- Prices of maize decreased seasonally in March 2020, but remained higher on yearly basis
- Estimated 1.9 million people in need of food assistance in first quarter of 2020
- To counter potential impacts of COVID-19 pandemic, Government strengthened monitoring activities of food markets to prevent overpricing

Above-average maize harvest forecast in 2020

Harvesting of the 2020 maize crop, which accounts for the bulk of the country's cereal output, started in April in southern areas.

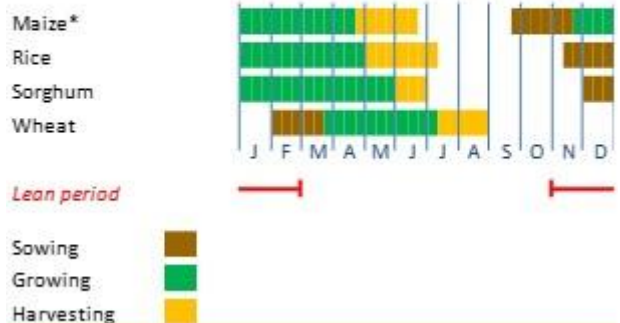
Between October 2019, the beginning of the rainy season, and January 2020, precipitation was well distributed and cumulative amounts were average to above average, supporting planting activities and early crop development in the main cereal-producing districts. Heavy rains in February sustained average to above-average rainfall totals, but also triggered small-scale floods in parts of the Central and Northern regions, causing localized losses of standing crops. In March, monthly rainfall deficits were recorded in parts of the Southern Region, with negative impacts on yields. As of late March, just prior to the main harvesting period, remote sensing vegetation data indicated mostly favourable crop conditions in Northern and Central regions and stressed conditions in parts of the South. Overall, the national maize yield is expected at an above-average level, with localized production shortfalls anticipated in some southern districts. An increased use of fertilizer and hybrid seeds, supported by Government-funded subsidy programmes, has also reinforced expectations of good yields.

The preliminary official production forecast for the 2020 maize output stands at just under 3.7 million tonnes, 9 percent above the high outturn in 2019 and 25 percent above the previous five-year average. However, the actual production is expected to be slightly lower than this level reflecting crop losses due to floods and dry weather conditions, which occurred in the months following the release of the first production forecast.

Malawi

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Malawi

Cereal Production

| | 2015-2019 average | 2019 | 2020 forecast | change 2020/2019 |
|--------------|----------------------|--------------|------------------|---------------------|
| | 000 tonnes | | | percent |
| Maize | 2 959 | 3 392 | 3 600 | 6.1 |
| Rice (paddy) | 113 | 134 | 145 | 8.2 |
| Sorghum | 89 | 137 | 140 | 2.1 |
| Others | 34 | 46 | 51 | 11.1 |
| Total | 3 194 | 3 709 | 3 936 | 6.1 |

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Cereal import requirements estimated at below-average level in 2019/20

The aggregate cereal import requirement in the 2019/20 marketing year (April/March) was estimated at about 200 000 tonnes. This volume was almost 35 percent below the previous five-year average, reflecting the large maize and rice production in 2019 that lowered import needs. Import requirements of wheat, which is only produced in marginal quantities, were estimated at an average level of 150 000 tonnes in 2019/20.

In the 2020/21 marketing year, based on a forecast second consecutive bumper harvest, the import requirement for cereals is anticipated to remain at a below-average level. In addition, the large domestic supplies should allow a build-up of the national strategic reserves.

Maize prices dipped seasonally in March 2020, but remained higher on yearly basis

Retail prices of maize decreased seasonally in March 2020, as traders released stocks from the previous year's output in anticipation of the 2020 harvest. However, the national average price of maize grain was still 65 percent higher compared to the year-earlier value. The higher level reflects sustained gains during the second half of 2019 and early 2020, driven partly by heightened import demand from neighbouring countries, where cereal harvests declined steeply in 2019.

Although seasonal price declines are likely to continue in the next weeks, disruptions to the movement of grains due to the COVID-19 pandemic could result in localized price spikes.

In early April, the Government announced an increase in the farmgate price for maize grain, which should set the minimum boundary that farmers to sell their crops. The revised level is now set at MWK 200 per kg compared to MWK 180 per kg in the previous year.

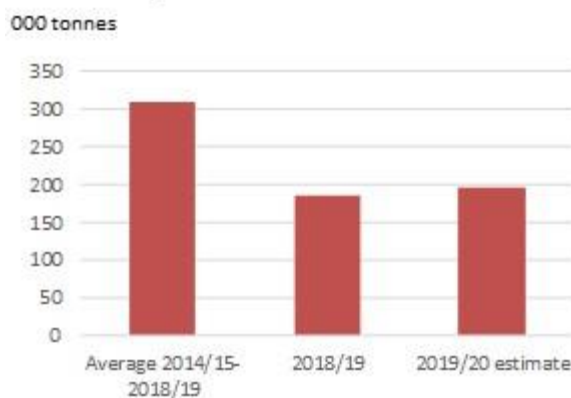
Increased number of people in need of food assistance

Based on the latest IPC analysis, released in January 2020, the estimated number of people facing acute food insecurity was revised upwards for the November 2019-March 2020 period, from 1.06 million to 1.9 million people, to take into account the effects of the sharp increase in maize prices, the main food staple. However, the revised estimate of the food insecure population was still 40 percent lower compared to the corresponding period of the previous year, on account of the large 2019 harvest. At subnational level, the highest prevalence of food insecurity was assessed in the southern districts of Balaka, Neno and Nsanje, and in the northern district of Karonga.

Looking further ahead, despite an expected above-average harvest in 2020 that would improve food availability and ease access constraints to food, the risks posed by the COVID-19 pandemic could cause an increase in the prevalence of malnutrition. The effects of the pandemic are expected to be primarily channeled through a reduction in economic activities and associated income losses, while potential breakdowns in the

Malawi

Cereals Imports

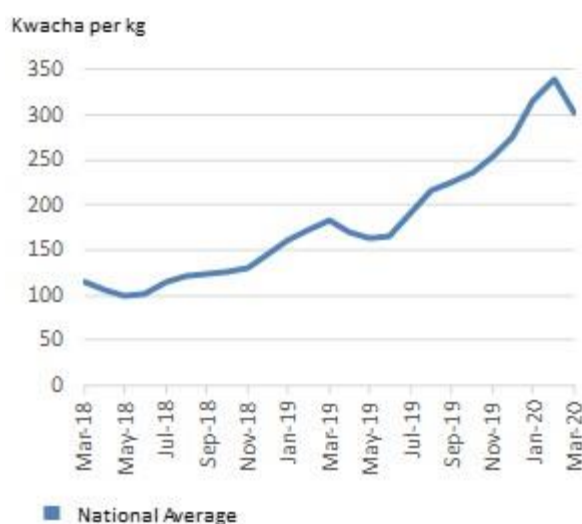


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Malawi

Retail maize prices



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

food supply chains represent additional concerns for food security across the country.

COVID-19 and measures adopted by the Government

A State of National Disaster was declared on 20 March 2020, as the Government took measures to prevent the spread of the COVID-19 virus. Although there were only a limited number of confirmed positive cases as of mid-April, the Government implemented international and domestic travel restrictions. Entities working in the food and agricultural supply chains are exempt from these restrictions and, in order to ease the pressure on these essential services, the Government reduced fuel prices. The Competition and Fair Trading Commission has increased its surveillance and monitoring activities in order to limit potential overpricing of food products.

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GIEWS Country Brief Malawi

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FOOD SECURITY SNAPSHOT

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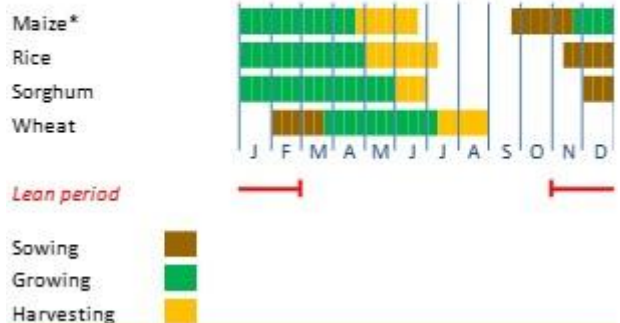
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Malawi

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Malawi

Cereal Production

| | 2015-2019 average | 2019 | 2020 forecast | change 2020/2019 |
|--------------|----------------------|--------------|------------------|---------------------|
| | 000 tonnes | | | percent |
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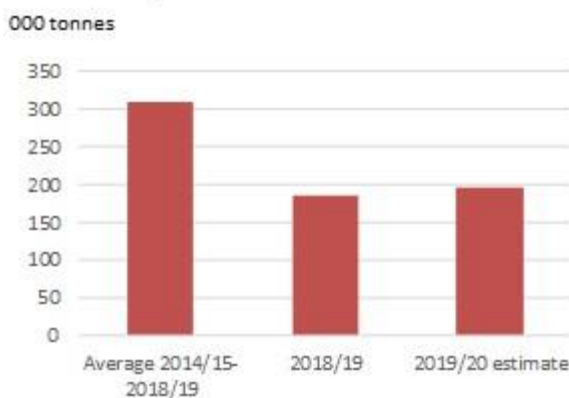
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Looking further ahead, despite an expected above-average harvest in 2020 that would improve food availability and ease access constraints to food, the risks posed by the COVID-19 pandemic could cause an increase in the prevalence of malnutrition. The effects of the pandemic are expected to be primarily channeled through a reduction in economic activities and associated income losses, while potential breakdowns in the

Malawi

Cereals Imports

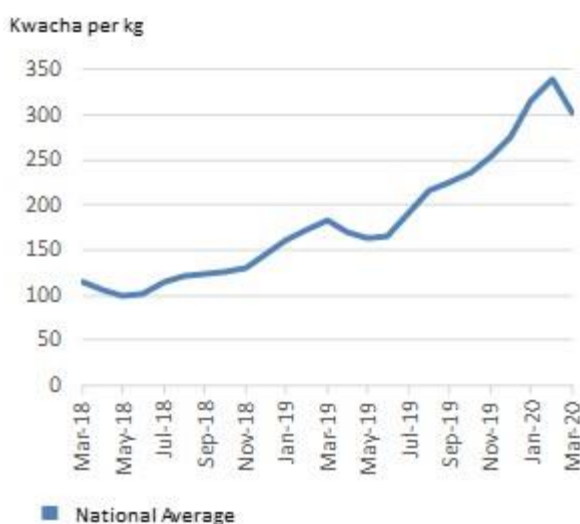


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Malawi

Retail maize prices



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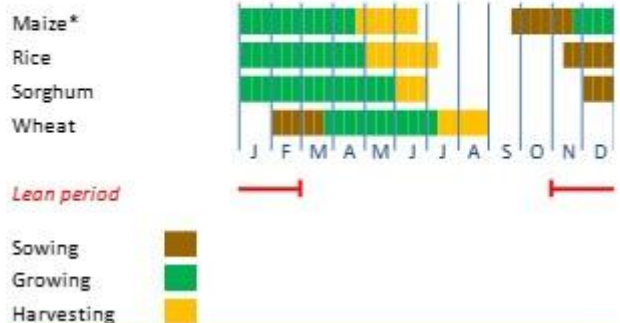
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Malawi

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Malawi

Cereal Production

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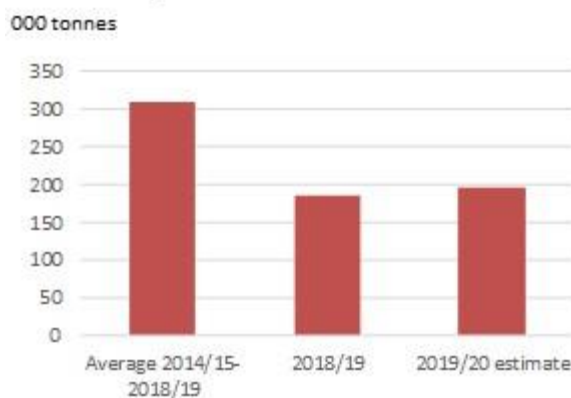
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Malawi

Cereals Imports

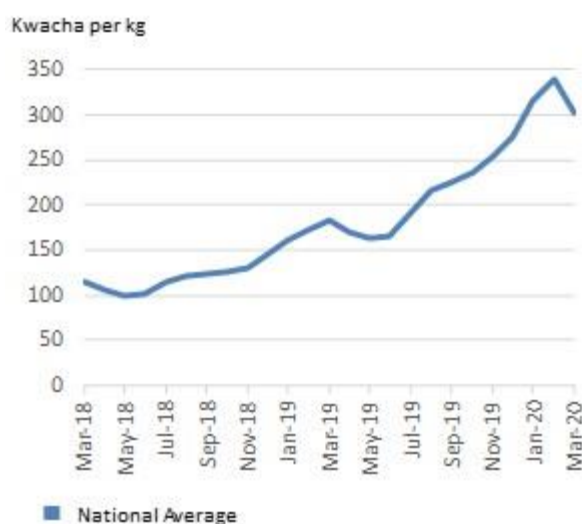


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Malawi

Retail maize prices



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

food supply chains represent additional concerns for food security across the country.

COVID-19 and measures adopted by the Government

A State of National Disaster was declared on 20 March 2020, as the Government took measures to prevent the spread of the COVID-19 virus. Although there were only a limited number of confirmed positive cases as of mid-April, the Government implemented international and domestic travel restrictions. Entities working in the food and agricultural supply chains are exempt from these restrictions and, in order to ease the pressure on these essential services, the Government reduced fuel prices. The Competition and Fair Trading Commission has increased its surveillance and monitoring activities in order to limit potential overpricing of food products.

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GIEWS Country Brief Malawi

Reference Date: 22-April-2020

FOOD SECURITY SNAPSHOT

- Maize production in 2020 forecast to exceed five-year average for second consecutive year
- Prices of maize decreased seasonally in March 2020, but remained higher on yearly basis
- Estimated 1.9 million people in need of food assistance in first quarter of 2020
- To counter potential impacts of COVID-19 pandemic, Government strengthened monitoring activities of food markets to prevent overpricing

Above-average maize harvest forecast in 2020

Harvesting of the 2020 maize crop, which accounts for the bulk of the country's cereal output, started in April in southern areas.

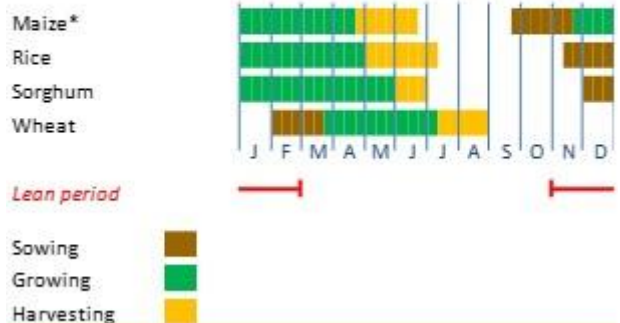
Between October 2019, the beginning of the rainy season, and January 2020, precipitation was well distributed and cumulative amounts were average to above average, supporting planting activities and early crop development in the main cereal-producing districts. Heavy rains in February sustained average to above-average rainfall totals, but also triggered small-scale floods in parts of the Central and Northern regions, causing localized losses of standing crops. In March, monthly rainfall deficits were recorded in parts of the Southern Region, with negative impacts on yields. As of late March, just prior to the main harvesting period, remote sensing vegetation data indicated mostly favourable crop conditions in Northern and Central regions and stressed conditions in parts of the South. Overall, the national maize yield is expected at an above-average level, with localized production shortfalls anticipated in some southern districts. An increased use of fertilizer and hybrid seeds, supported by Government-funded subsidy programmes, has also reinforced expectations of good yields.

The preliminary official production forecast for the 2020 maize output stands at just under 3.7 million tonnes, 9 percent above the high outturn in 2019 and 25 percent above the previous five-year average. However, the actual production is expected to be slightly lower than this level reflecting crop losses due to floods and dry weather conditions, which occurred in the months following the release of the first production forecast.

Malawi

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Malawi

Cereal Production

| | 2015-2019 average | 2019 | 2020 forecast | change 2020/2019 |
|--------------|----------------------|--------------|------------------|---------------------|
| | 000 tonnes | | | percent |
| Maize | 2 959 | 3 392 | 3 600 | 6.1 |
| Rice (paddy) | 113 | 134 | 145 | 8.2 |
| Sorghum | 89 | 137 | 140 | 2.1 |
| Others | 34 | 46 | 51 | 11.1 |
| Total | 3 194 | 3 709 | 3 936 | 6.1 |

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Cereal import requirements estimated at below-average level in 2019/20

The aggregate cereal import requirement in the 2019/20 marketing year (April/March) was estimated at about 200 000 tonnes. This volume was almost 35 percent below the previous five-year average, reflecting the large maize and rice production in 2019 that lowered import needs. Import requirements of wheat, which is only produced in marginal quantities, were estimated at an average level of 150 000 tonnes in 2019/20.

In the 2020/21 marketing year, based on a forecast second consecutive bumper harvest, the import requirement for cereals is anticipated to remain at a below-average level. In addition, the large domestic supplies should allow a build-up of the national strategic reserves.

Maize prices dipped seasonally in March 2020, but remained higher on yearly basis

Retail prices of maize decreased seasonally in March 2020, as traders released stocks from the previous year's output in anticipation of the 2020 harvest. However, the national average price of maize grain was still 65 percent higher compared to the year-earlier value. The higher level reflects sustained gains during the second half of 2019 and early 2020, driven partly by heightened import demand from neighbouring countries, where cereal harvests declined steeply in 2019.

Although seasonal price declines are likely to continue in the next weeks, disruptions to the movement of grains due to the COVID-19 pandemic could result in localized price spikes.

In early April, the Government announced an increase in the farmgate price for maize grain, which should set the minimum boundary that farmers to sell their crops. The revised level is now set at MWK 200 per kg compared to MWK 180 per kg in the previous year.

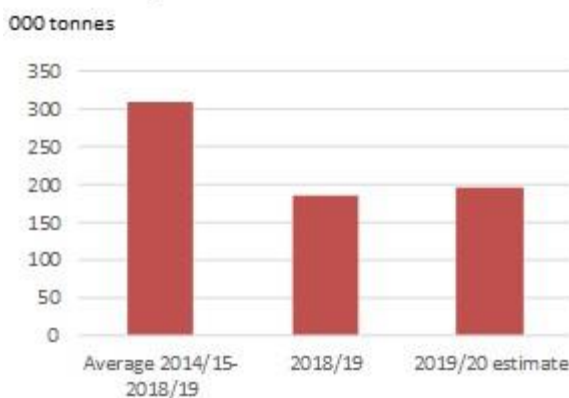
Increased number of people in need of food assistance

Based on the latest IPC analysis, released in January 2020, the estimated number of people facing acute food insecurity was revised upwards for the November 2019-March 2020 period, from 1.06 million to 1.9 million people, to take into account the effects of the sharp increase in maize prices, the main food staple. However, the revised estimate of the food insecure population was still 40 percent lower compared to the corresponding period of the previous year, on account of the large 2019 harvest. At subnational level, the highest prevalence of food insecurity was assessed in the southern districts of Balaka, Neno and Nsanje, and in the northern district of Karonga.

Looking further ahead, despite an expected above-average harvest in 2020 that would improve food availability and ease access constraints to food, the risks posed by the COVID-19 pandemic could cause an increase in the prevalence of malnutrition. The effects of the pandemic are expected to be primarily channeled through a reduction in economic activities and associated income losses, while potential breakdowns in the

Malawi

Cereals Imports

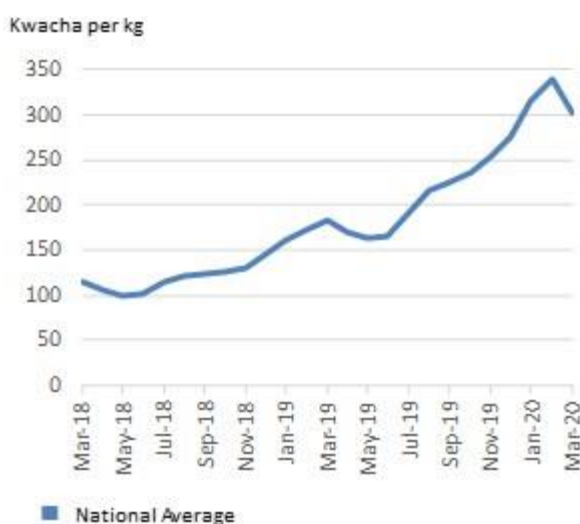


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Malawi

Retail maize prices



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

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GIEWS Country Brief Malawi

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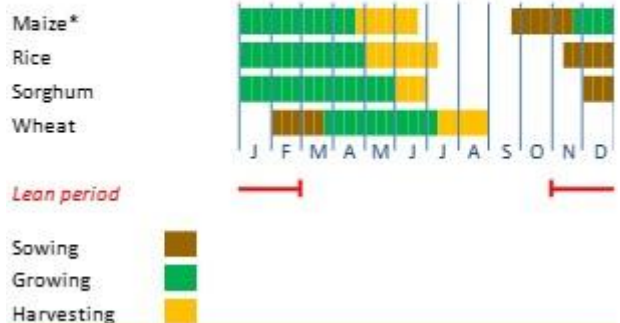
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Malawi

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Malawi

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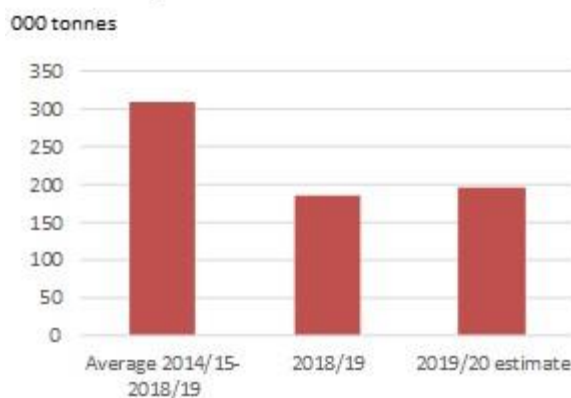
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Malawi

Cereals Imports

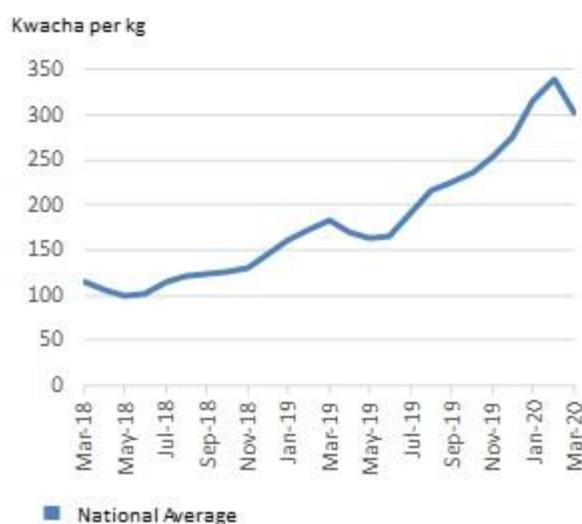


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Malawi

Retail maize prices



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

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GIEWS Country Brief Malawi

Reference Date: 22-April-2020

FOOD SECURITY SNAPSHOT

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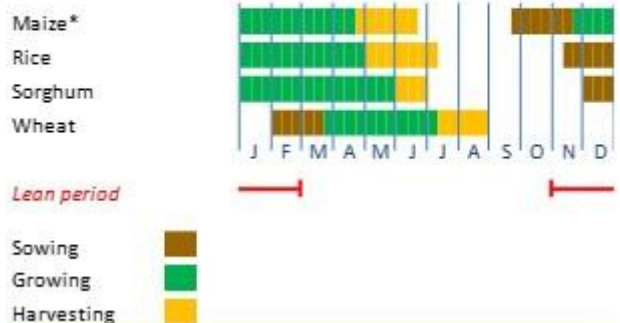
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Malawi

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Malawi

Cereal Production

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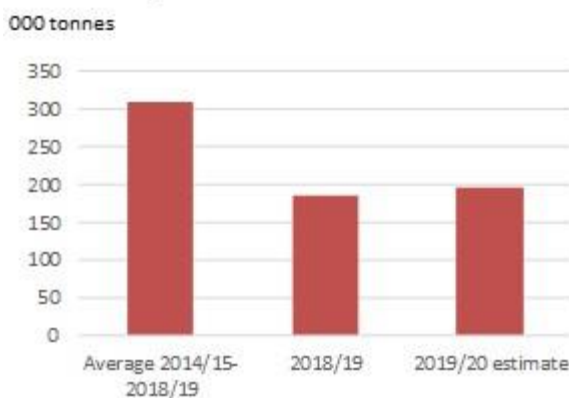
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Malawi

Cereals Imports

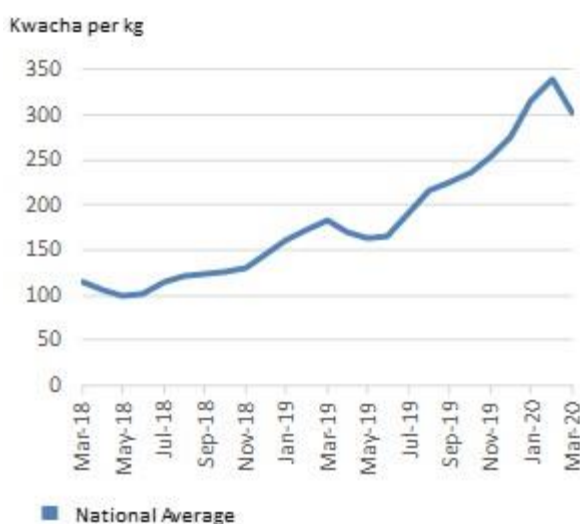


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Malawi

Retail maize prices



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

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COVID-19 and measures adopted by the Government

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GIEWS Country Brief Malawi

Reference Date: 08-January-2020

FOOD SECURITY SNAPSHOT

- Favourable rains supported sowing operations and early development of 2020 cereal crops
- Cereal production in 2019 estimated at above-average level
- Import requirements in 2019/20 marketing year estimated below average
- Maize grain prices rose further in second semester of 2019
- Nearly 1.9 million people estimated in need of food assistance due to localized production shortfalls and high food prices

Beneficial seasonal rains supported plantings of 2020 cereal crops

Planting of 2020 cereal crops concluded in December 2019 and the harvest is expected to start in April. Since the start of the cropping season in October, conducive weather conditions have resulted in adequate soil moisture levels, which supported planting operations and early crop development. For the January-March 2020 period, seasonal weather forecasts point to an increased probability of average to above-average precipitation across the country, raising the likelihood of a second consecutive above-average cereal output in 2020.

Above-average cereal production in 2019

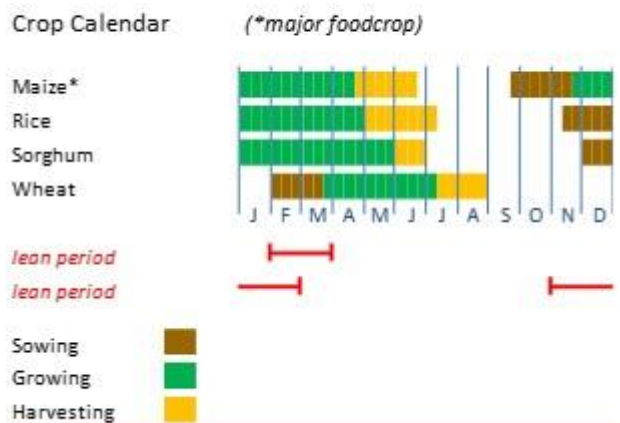
Harvesting of the 2019 maize crop, which accounts for the bulk of the country's total cereal output, was completed last June and production is estimated at about 3.4 million tonnes, 10 percent above the five-year average. Localized shortfalls in maize production were registered in parts of the Southern Region, where about one-third of the national maize harvest is produced, due to flood-related crop damage and losses.

Production of other cereal crops, mainly rice and sorghum, was also estimated at above-average levels as favourable weather conditions boosted the area planted and yields. Overall, cereal production in 2019 is estimated at 3.7 million tonnes, 12 percent above the five-year average.

Cereal import requirements in 2019/20 estimated below average

Aggregate cereal import requirements in the 2019/20 marketing year (April/March) are estimated at about 200 000 tonnes. This

Malawi



Source: FAO/GIEWS, FEWSNET.

Malawi

Cereal Production

| | 2014-2018 average | 2018 | 2019 estimate | change 2019/2018 |
|--------------|----------------------|--------------|------------------|---------------------|
| | 000 tonnes | | | percent |
| Maize | 3 076 | 2 792 | 3 392 | 21.5 |
| Rice (paddy) | 112 | 114 | 134 | 18.0 |
| Sorghum | 80 | 86 | 137 | 59.4 |
| Others | 34 | 35 | 46 | 31.2 |
| Total | 3 302 | 3 026 | 3 709 | 22.6 |

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

volume is almost 35 percent below the five-year average, reflecting the larger maize and rice harvests that lowered the import needs for these two cereals. Import requirements of wheat, which is only produced in marginal quantities, are estimated at an average level of 150 000 tonnes in 2019/20.

Maize prices increased further in second semester of 2019

Retail prices of maize have generally increased since May 2018. Following a brief decline during the main 2019 harvest period between April and June, prices continued to rise from July. As of November 2019, despite the larger domestic supplies following the bumper 2019 harvest, the national average retail price of maize grain was MWK 254 per kg, almost double the year-earlier values. The elevated level mostly reflects heightened import demand from neighbouring countries, where cereal harvests in 2019 declined steeply. Additionally, localized shortfalls in production in southern districts led to tight supplies and resulted in prices that were well above the national average in these areas.

Institutional purchases to bolster the national strategic reserves have exerted further pressure and an increase in the price of fuel in early November is also likely to support price gains in the coming months.

Nearly 1.9 million people in need of food assistance

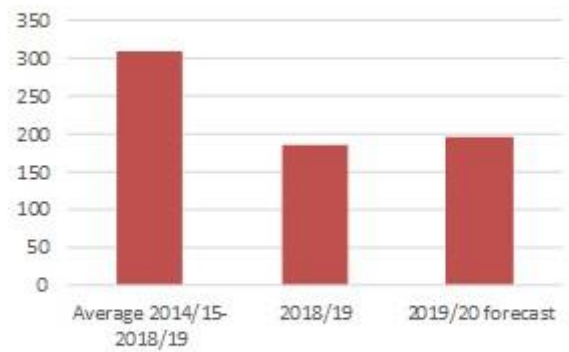
According to latest IPC analysis released in January 2020, the number of food insecure people in the November 2019–March 2020 period is estimated at 1.9 million people, about 40 percent below the high level of the previous year. This reflects the positive impact of the larger 2019 harvest on food availability for own consumption. The highest prevalence of severe food insecurity (IPC Phase 3) is in the southern districts of Balaka and Nsanje, and in northern Karonga District, due to localized shortfalls in cereal production, high food prices and reduced labour opportunities.

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Malawi

Cereals Imports

000 tonnes



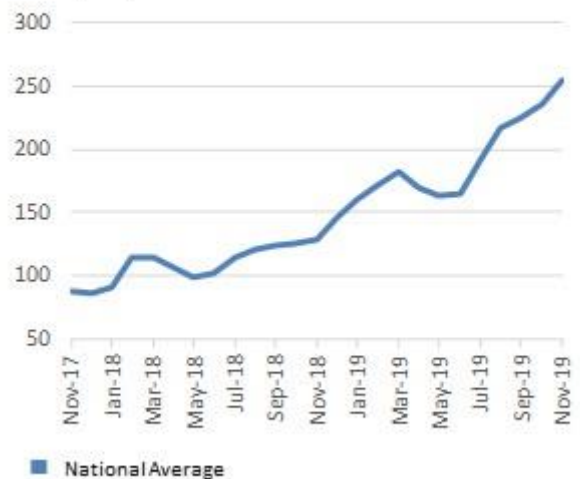
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Source: FAO/GIEWS Country Cereal Balance Sheets.

Malawi

Retail maize prices

Kwacha per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Malawi

Reference Date: 16-December-2019

FOOD SECURITY SNAPSHOT

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Beneficial seasonal rains supported plantings of 2020 cereal crops

Planting of the 2020 cereal crops, to be harvested from next April, is about to finalize. Since the start of the cropping season in October, conducive weather conditions have resulted in adequate soil moisture levels, which supported planting operations and early crop development. For the December 2019-March 2020 period, seasonal weather forecasts point to an increased probability of average to above-average precipitation across the country, raising the likelihood of a second consecutive above-average cereal output in 2020.

Above-average cereal production in 2019

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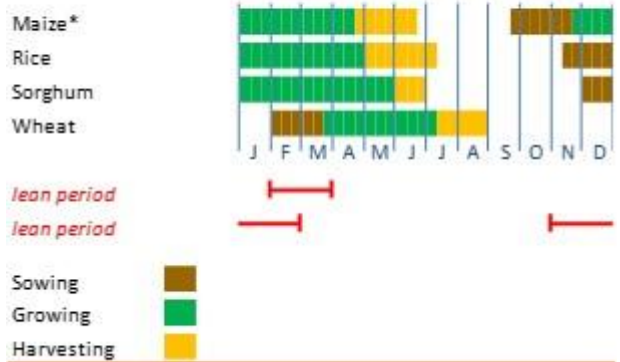
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Malawi

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Malawi

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Institutional purchases to bolster the national strategic reserves have exerted further pressure and an increase in the price of fuel in early November is also likely to support price gains in the coming months.

Nearly 1 million people in need of food assistance

According to latest IPC analysis made in June 2019, the number of food insecure people in the October 2019-March 2020 period is estimated to be less than half the level of the previous year. This reflects the positive impact of the bumper 2019 harvest on food availability for own consumption. Nonetheless, an estimated 1.06 million people were assessed to be food insecure, with the highest prevalence of severe food insecurity (IPC phases 3 and higher) located in southern districts, due to localized shortfalls in cereal production.

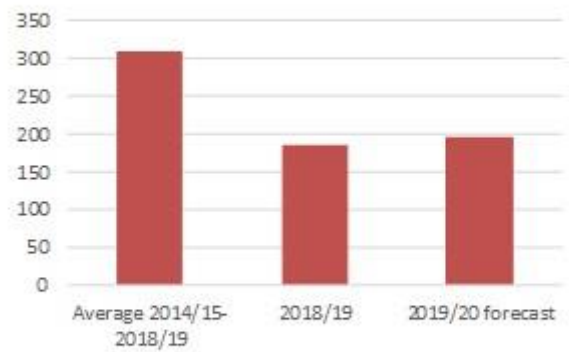
However, in consideration of the steeply increasing prices of maize grain, the key staple food, the number of food insecure is expected to be higher than what is currently estimated.

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Malawi

Cereals Imports

000 tonnes



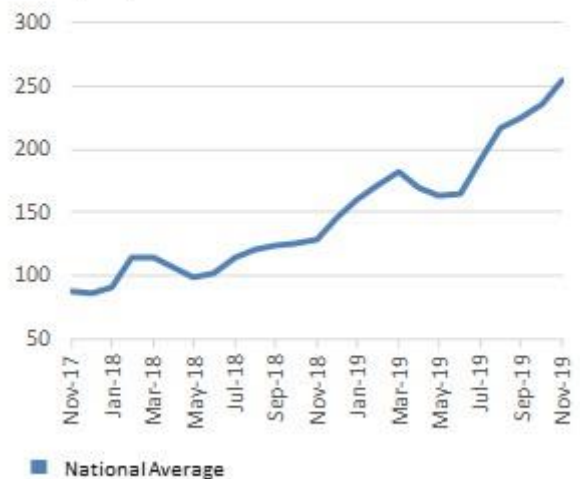
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Malawi

Retail maize prices

Kwacha per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Malawi

Reference Date: 20-September-2019

FOOD SECURITY SNAPSHOT

- Cereal production rises to above-average level in 2019
- Boosted by larger harvest, supply outlook improved in 2019/20 marketing year (April/March)
- Recent uptick in maize grain prices reinforces higher year-on-year levels
- Despite improvements in food security, over 1 million people still require assistance for food due to localized production shortfalls

Favourable weather instigates rebound in maize production

Maize production, which accounts for the bulk of the country's aggregate cereal output, is estimated at about 3.4 million tonnes in 2019, marking a rebound from the reduced output of 2018. At this level, the maize harvest is 10 percent above the average of the previous five years. The favourable outturn was mostly the result of conducive weather conditions in central and northern districts. However, in the Southern Region, which produces about one-third of the national maize harvest, heavy rains in early March resulted in flooding, causing the loss of standing crops.

Outputs of the other cereal crops are also estimated at above-average levels as favourable weather conditions boosted the area harvested and yields. Overall, cereal production in 2019 is estimated at 3.7 million tonnes, 12 percent above the average.

Planting of the 2020 crops, that are to be harvested next March, will begin in October. Seasonal weather forecasts point to an overall higher likelihood of average precipitation throughout the country for most of the cropping season (October-June), which indicates an increased likelihood of a second consecutive above-average cereal output in 2020.

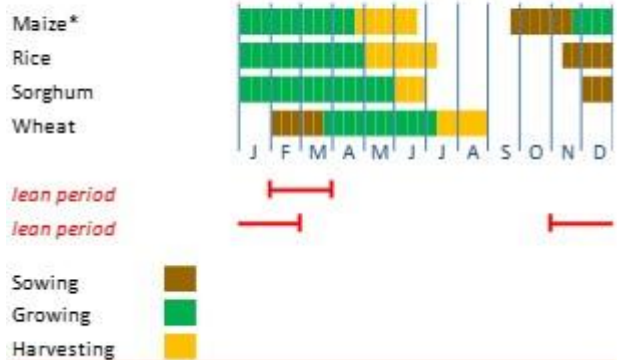
Boost in cereal supplies in 2019/20

The larger maize output has boosted the supply outlook for the 2019/20 marketing year (April/March), with a moderate build-up in stocks for both households and national strategic reserves expected. At the same time, import requirements are foreseen at below-average levels. Overall, maize supplies are forecast at an average level in 2019/20, in contrast to the below-average availabilities of the previous year.

Malawi

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Malawi

Cereal Production

| | 2014-2018 average | 2018 | 2019 estimate | change 2019/2018 |
|--------------|----------------------|--------------|------------------|---------------------|
| | 000 tonnes | | | percent |
| Maize | 3 076 | 2 792 | 3 392 | 21.5 |
| Rice (paddy) | 112 | 114 | 134 | 18.0 |
| Sorghum | 80 | 86 | 137 | 59.4 |
| Others | 34 | 35 | 46 | 31.2 |
| Total | 3 302 | 3 026 | 3 709 | 22.6 |

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Uptick in maize grain prices in recent months

Nominal prices of maize grain rose steeply in July and firmed up in August 2019, having generally risen since mid-2018. As a result, the national average maize price, at MWK 217 per kg, was about 80 percent higher year on year as of August. The elevated levels were mostly driven by the effects of a tight supply situation in the previous year. Despite a larger output in 2019, seasonal price declines were tempered by a combination of an increase in the farm gate price to MWK 180 per kg (up from MWK 150), heightened export demand from neighbouring countries reflecting the poor harvests and expectations of an increase in institutional purchases in 2019.

Improved harvest lessens food assistance needs

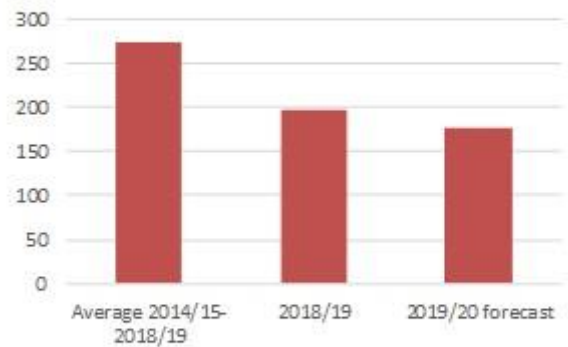
Prompted by the production upturn, the number of food insecure people is estimated to have fallen on a yearly basis from 2.2 million to 0.67 million in the July-September 2019 period. Food insecurity is, however, expected to worsen in the next months, particularly for rural households in the south that were affected by floods. Consequently, the number of people in need of assistance is projected to increase to 1.06 million between October 2019 and March 2020, according to the latest IPC analysis. These projections were based on the assumption that maize prices would remain below MWK 250 per kg. However, given the current levels and the historical seasonal trends, prices could surpass this threshold before the harvest period in March 2020 and, consequently, result in an aggravation of food insecurity conditions.

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Malawi

Cereals Imports

000 tonnes



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

Source: FAO/GIEWS Country Cereal Balance Sheets.



GIEWS Country Brief Malawi

Reference Date: 18-March-2019

FOOD SECURITY SNAPSHOT

- Cereal production in 2019 forecast at above average level, reflecting generally beneficial rains
- However, in southern districts heavy rainfall in March triggered floods which are expected to cause crop losses and lower harvests compared to earlier expectations
- Maize prices increased steeply and were above year-earlier values at start of 2019
- Food insecurity expected to worsen in flood-affected southern districts, but forecast increase in cereal production in 2019 anticipated to improve conditions at national level

Production of maize forecast to increase in 2019

Harvesting of the 2019 main season cereal crops is expected to start from late April.

Production of maize, the main food staple, is forecast to increase to an above average level of about 3.3 million tonnes in 2019. The principal factor supporting the favourable production outlook has been the generally beneficial rainfall since the start of the cropping season in October 2018. As a result, cropped areas in the central and northern regions exhibited satisfactory vegetation conditions at the start of March, inferring a likely increase in maize yields in 2019, with the area sown expected at an average level.

However, in the southern region, which produces about one-third of the national maize output, heavy rains in the first week of March caused flooding in 13 districts. No official data is yet available regarding the impact to the agriculture sector, although crop losses are expected in the worst affected zones. In addition, in areas where there is still standing water or excessive soil moisture, yields are likely to be lower than earlier expectations.

In addition to maize, a production increase is also forecast for the second main cereal crop, rice, similarly reflecting mostly favourable weather conditions, while sorghum and millet harvests are expected at average levels in 2019.

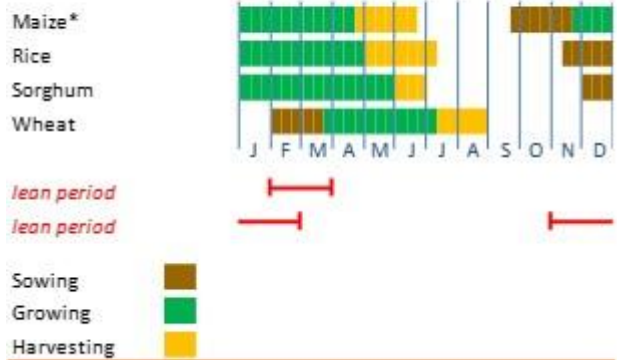
Cereal supplies set to improve in 2019/20

Following a tight maize supply situation in the 2018/19 marketing year (April/March) due to a sharply reduced harvest, prospects

Malawi

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Malawi

Cereal Production

| | 2014-2018 average | 2018 | 2019 forecast | change 2019/2018 |
|--------------|----------------------|--------------|------------------|---------------------|
| | 000 tonnes | | | percent |
| Maize | 3 076 | 2 792 | 3 300 | 18.2 |
| Rice (paddy) | 112 | 114 | 134 | 18.0 |
| Sorghum | 80 | 86 | 80 | -7.0 |
| Others | 34 | 35 | 36 | 3.0 |
| Total | 3 302 | 3 026 | 3 550 | 17.3 |

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

for 2019/20 are more favourable resting on the likely increase in production. The forecast supply upturn is expected to enable a build-up in stocks for both households and national strategic reserves, while import requirements are foreseen to fall and remain at below average levels.

Reduced supplies in 2018/19 push up maize prices

Prices of maize increased steeply since the last quarter of 2018, with seasonal trends exacerbated by a tighter-than-normal supply situation. As a result, prices of maize in January 2019 were more than one-third above their year-earlier levels and, for example, in the northern city of Mzuzu they had doubled. In the southern districts, the recent impact of the floods could result in temporary price spikes, due to disruptions to the food supply chain.

Looking further ahead, if the above average production in 2019 occurs, maize prices are expected to come under downward pressure in 2019 following the main harvest that is expected to begin in late April.

Floods aggravate food insecurity in south

An estimated 3.3 million people were assessed to be in need of food assistance until the start of the main harvest in April. The most food insecure districts are in the south, reflecting the impact of production shortfalls in 2018. As a result, many households depleted their food supplies from own-production earlier than normal, compelling households to access market supplies prematurely.

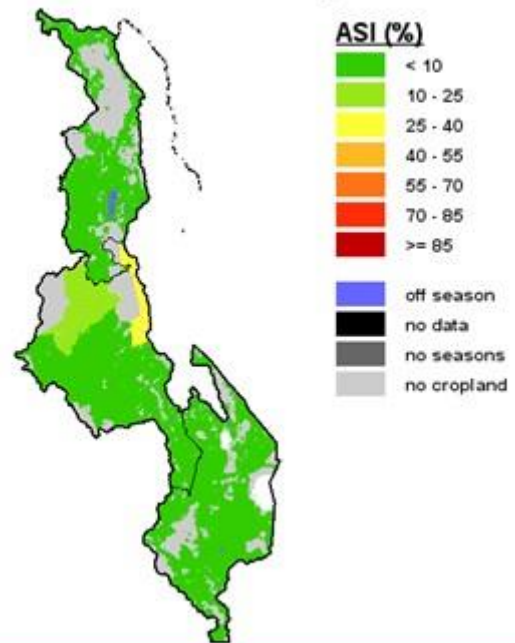
Moreover, the recent floods in the southern region, which have affected over 900 000 people, have further compounded the situation. Losses of food supplies, damages to the soon-to-be harvested 2019 crops and reduced access to markets, are likely to aggravate food security conditions. Heavy rainfall, forecast for much of the second dekad of March, could increase the risk of further flooding, potentially resulting in larger crop losses and interruptions to humanitarian operations.

In the central and northern districts, the forecast increase in cereal production is expected to foster improvements in food security in 2019 compared to the previous year.

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Malawi - Agricultural Stress Index (ASI)¹

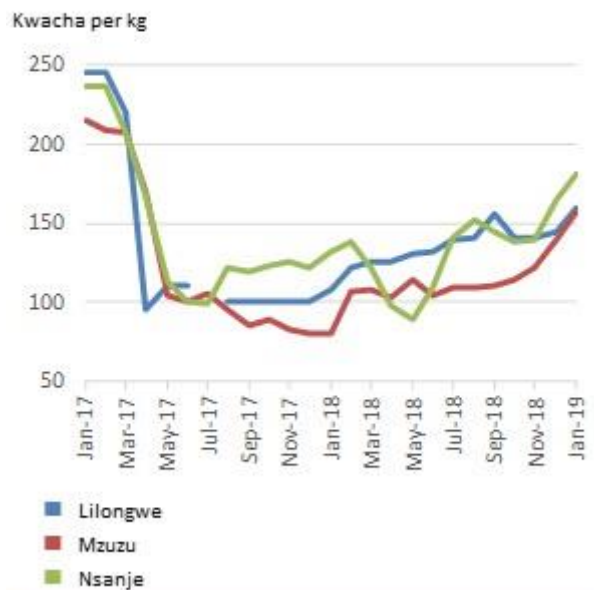
from start of season 1 to dekad 1, March 2019



Source: FAO/GIEWS Earth Observation System.

Malawi

Retail maize prices



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Malawi

Reference Date: 27-March-2018

FOOD SECURITY SNAPSHOT

- Cereal production in 2018 expected to decline to below-average level of around 3 million tonnes, mostly reflecting unfavourable rains
- Maize prices rise seasonally at start of 2018, but remained below year-earlier levels on account of overall improved supply situation
- Food security expected to worsen later in the year in specific areas affected by dry weather conditions

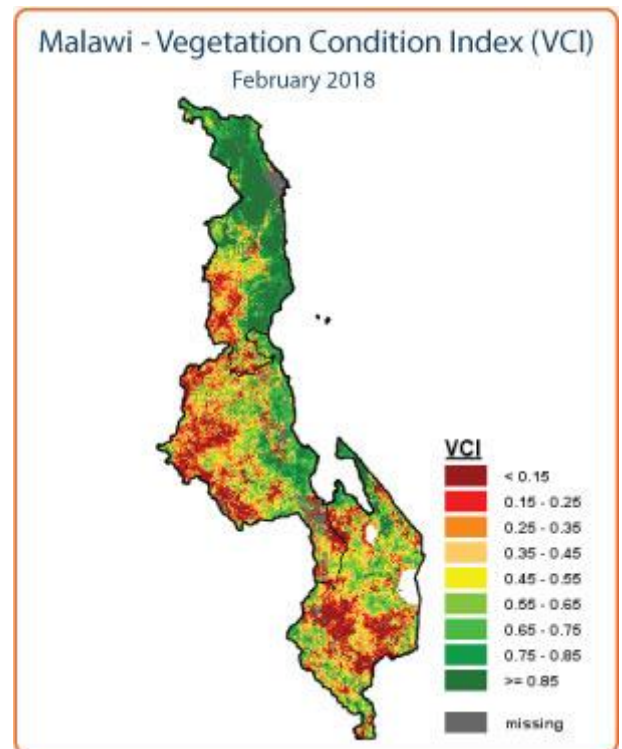
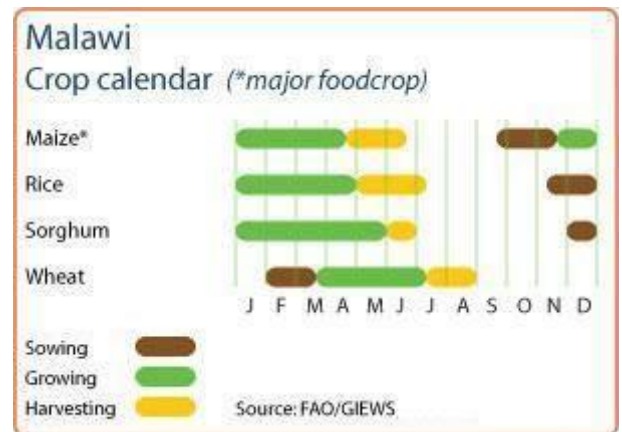
Production of maize forecast to fall in 2018

Harvesting of the main 2018 season cereal crops is expected to commence in late April and the current prospects indicate that production is expected to decline to a below-average level this year. The 2018 production outlook mostly reflects poor seasonal rains between October 2017 and January 2018 in central and southern districts, with a prolonged dry period in January.

While mostly beneficial weather was observed in the North Region, which contributes to about one-third of the national maize output (the main food staple), rains in the Centre and South regions were unevenly distributed temporally, although cumulative levels were near average. These conditions caused moisture stress and resulted in crop wilting, in some cases permanently, lowering yield potentials. Since February, however, rainfall distribution has improved, benefitting the late-planted crops, although heavy rainfall had also triggered localized flooding.

In addition to the generally poor rains, the infestation of Fall Armyworm (FAW) is also expected to cause some production losses although the response to FAW infestations was generally adequate. Estimates from the Ministry of Agriculture, Irrigation and Water Development in early March indicate that close to 292 000 hectares of maize, millet and sorghum were affected.

Although weather forecasts indicate a likely continuation of above-average precipitation until May, the 2018 maize production is forecast to be around 3 million tonnes, with a decline between 10 and 15 percent compared to the 2017 output, mainly reflecting the earlier dry spells. The anticipated decline would result in a below average harvest. Results from the Government's crop assessment are anticipated to be available in May/June.



Import needs forecast to rise in 2018/19

Based on an expected reduction in the 2018 maize output, import requirements are forecast to rise to near-average levels of about 130 000 tonnes in the 2018/19 marketing year (April/March), with higher stocks curbing larger import needs. As of early 2018, the Government's maize stock was estimated at an above-average approximately 200 000 tonnes.

In the nearly complete 2017/18 marketing year (April/March), cereal supply conditions are significantly better than the previous year, primarily reflecting the above-average 2017 maize output of 3.5 million tonnes. Larger harvests were also registered for millet, rice and sorghum, contributing to an overall cereal production of 3.7 million tonnes, 6 percent higher than the previous five-year average (2012-2016). As a result, imports of maize were minimal in 2017/18 and well below the above-average quantities imported in the previous marketing year.

Prices of maize rise seasonally, but remained significantly lower on a yearly basis

Following a sharp fall at the beginning of 2017, prices of maize remained generally stable throughout the whole year and strengthened seasonally in early 2018. On account of the overall favourable supply situation, prices of maize in most markets are generally down on a yearly basis. Although the lower prices are expected to benefit net-consuming households, the reduced levels are likely to cause a drop in income levels for farming households.

Food security expected to worsen in 2018 in areas affected by poor rains

The current food security conditions are mostly stable on account of the generally good food supplies and lower cereal prices as well as in consideration of the new supplies from the imminent 2018 harvest. According to an updated IPC analysis in November 2017, an estimated 1.04 million people require humanitarian assistance between January and March, down from an estimated 6.7 million in the first quarter of 2017. Assistance is expected to be provided to about 836 000 people until the end of March 2018, mostly in the form of cash transfers.

Food security conditions are anticipated to worsen later in 2018 due to the foreseen below average harvest. However, above average stocks are expected to partially offset the impact of a lower output, helping to stabilize cereal supplies and avert a more pronounced deterioration in the food security.

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Malawi

Cereal production

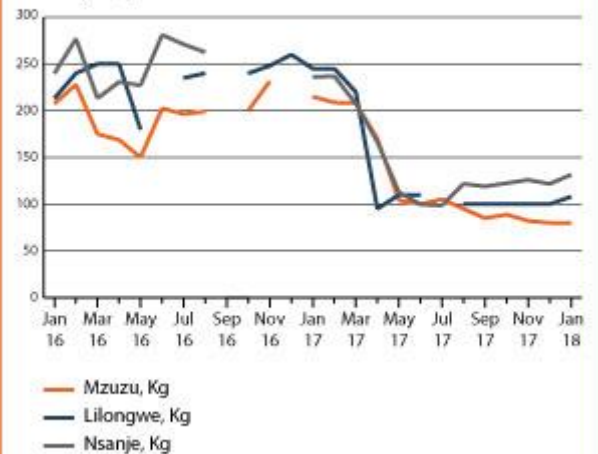
| | 2012-2016 | 2016 | 2017 | change |
|--------------|--------------|--------------|--------------|-----------|
| | average | | estimate | 2017/2016 |
| | 000 tonnes | | | percent |
| Maize | 3 278 | 2 369 | 3 464 | 46 |
| Rice (paddy) | 113 | 87 | 121 | 39 |
| Sorghum | 75 | 50 | 90 | 80 |
| Others | 35 | 21 | 36 | 71 |
| Total | 3 501 | 2 528 | 3 711 | 47 |

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

Malawi

Retail maize prices

Kwacha per Kg



Source: Ministry of Agriculture and Food Security



GlEWS Country Brief Malawi

Reference Date: 07-November-2017

FOOD SECURITY SNAPSHOT

- Planting of 2018 cereal crops underway
- Cereal production in 2017 rebounded strongly, mostly resulting from beneficial weather conditions
- Maize prices well below year-earlier levels, reflecting favourable supply situation
- Food security situation improved significantly, with food insecure numbers falling by 87 percent on yearly basis

Planting of 2018 crops underway

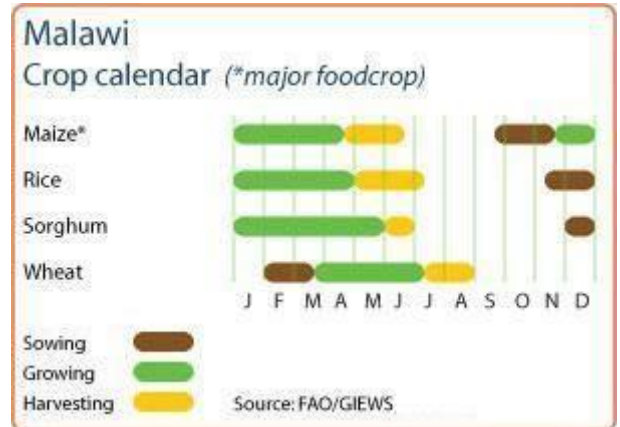
Land preparation for, and planting of, the 2018 cereal crops is underway, with light rains recorded in localized parts of Central and Southern regions in October. Weather forecasts point to a slightly higher probability of below-normal rains until early next year; however, this does not directly imply insufficient rainfall for normal crop development, as average rainfall volumes for the season are higher than the water requirements for the maize crop. The Government will continue with the implementation of the Farm Input Subsidy Programme (FISP) in the 2017/18 cropping season, with the objective to improve farmers' access to agricultural inputs. As part of the FISP, the Government has raised the value of maize seed vouchers to MWK 6 000, up from MWK 3 000 in 2016, in efforts to further augment access to improved seed varieties.

Cereal production increased to an above-average level in 2017

The 2017 maize output is officially estimated at approximately 3.5 million tonnes, 46 percent up on a yearly basis compared to the drought-reduced 2016 output and 6 percent higher compared to the previous five-year average. Production gains are also estimated for millet, rice and sorghum, contributing to an overall above-average cereal output of 3.7 million tonnes in 2017.

The increase is mainly reflective of beneficial weather conditions, despite poor rains at the start of the season and generally good availability of inputs. However, weather shocks (dry spells) and Fall Armyworm infestations have caused some localized damage.

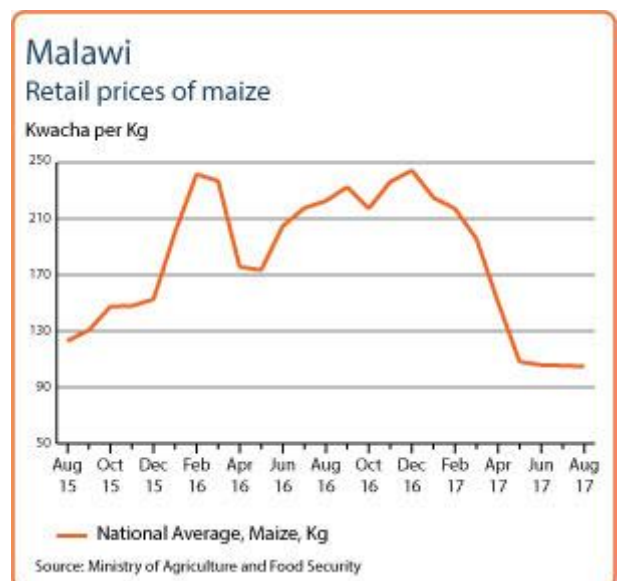
Regarding cash crops, cotton production is estimated to have declined by 6 percent to about 30 000 tonnes, reflecting a decrease in plantings as farmers switched to alternative crops. Similarly, tobacco production is estimated to be down compared to the previous year.



Malawi
Cereal production

| | 2012-2016 | 2016 | 2017 | change |
|--------------|--------------|--------------|--------------|-----------|
| | average | | estimate | 2017/2016 |
| | 000 tonnes | | | percent |
| Maize | 3 278 | 2 369 | 3 464 | 46 |
| Rice (paddy) | 113 | 87 | 121 | 39 |
| Sorghum | 75 | 50 | 90 | 80 |
| Others | 35 | 21 | 36 | 71 |
| Total | 3 501 | 2 528 | 3 711 | 47 |

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



Import requirements fall on account of larger domestic output

As a result of the larger domestic output in 2017, imports of maize are expected at only minimal levels in the 2017/18 marketing year (April/March). In the previous marketing year, to compensate for both the reduced 2016 output (34 percent below the five-year average) and the significantly depleted stocks (household and public reserves), maize imports were estimated at about 350 000 tonnes, compared to an average figure of 45 000 tonnes.

In late October 2017, reflecting the larger output and improved supply situation, the Government lifted the two-year ban on maize exports, which was implemented in an effort to stem the impact of tight domestic supplies following a dry weather-affected production in 2016.

Rice imports are also forecast to fall slightly, as the increase in paddy production will satisfy a larger proportion of the domestic consumption needs.

Maize prices decline steeply to below year-earlier levels

The favourable supply situation triggered a steep decline in maize prices between March and May 2017, pushing prices well below their year earlier levels. As of August 2017, the national average maize price, at MWK 105 per kg, was 53 percent down on a yearly basis. The Agricultural Development Corporation (ADMARC), a Government parastatal, is selling maize at MWK 250, more than double the national average retail price.

The fall in maize prices and other food items were the main drivers behind a sharp slowdown in the national inflation rate. In August 2017, the annual rate was estimated at 9 percent, falling into single digits for the first time since 2011.

Food security conditions improved significantly in 2017/18

Food security conditions improved significantly this year on account of the increased cereal output and lower cereal prices that improved food access. However, the reduced cash crop production is likely to have constrained income opportunities for some farming households, curbing the positive impacts of lower food prices. Below-average 2017 cereal harvests in some southern districts are expected to stress food security conditions as households' food stocks have been exhausted earlier than usual.

Overall, according to the results from the 2017 Malawi Vulnerability Assessment Committee's (MVACs) evaluation, about 835 000 people are estimated to be food insecure in 2017/18, compared to 6.7 million who required food assistance in 2016/17.

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GIEWS Country Brief Malawi

Reference Date: 13-July-2017

FOOD SECURITY SNAPSHOT

- Cereal production in 2017 is estimated at an above-average level following beneficial weather conditions
- Imports of maize and rice expected to decline in 2017/18 due to the larger domestic output
- Prices of maize and rice declined reflecting the favourable supply outlook and harvest pressure
- Food security situation expected to improve in 2017/18 due to the increased cereal output and lower prices

Beneficial weather boosts cereal production in 2017

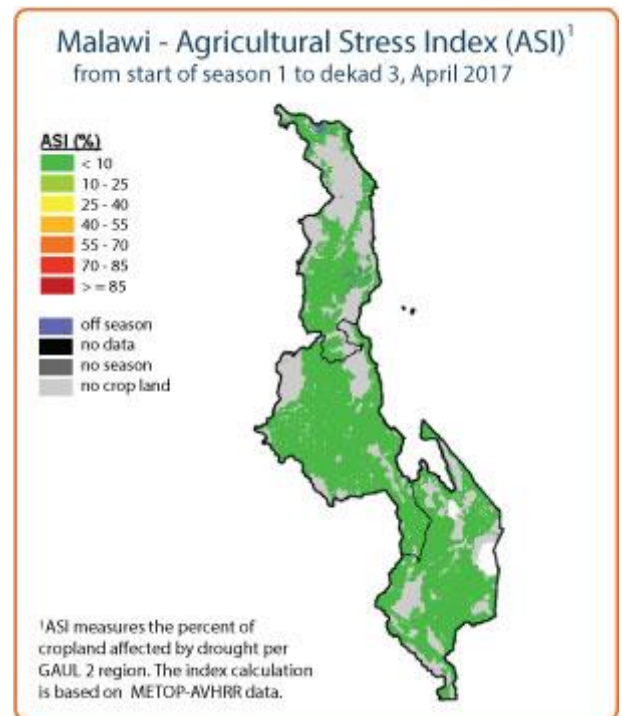
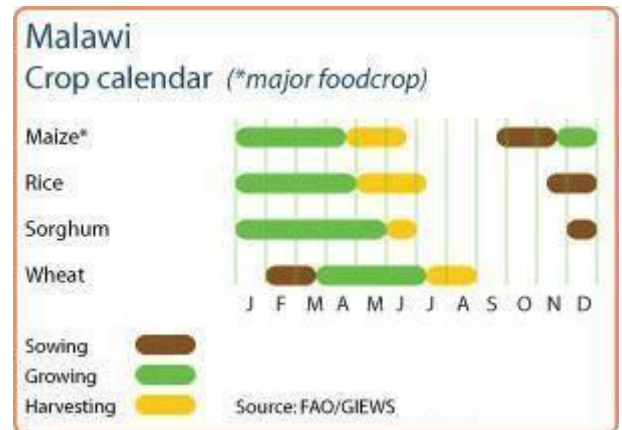
Harvesting of the 2017 cereal crop is nearly complete. Owing to generally favourable weather conditions during the 2016/17 summer cropping season (October-July), the maize output is officially estimated at an above-average level of nearly 3.5 million tonnes. At this level, maize production in 2017 is about 46 percent up on a yearly basis. Production gains are also anticipated for sorghum and rice, and these increases are forecast to contribute to an overall average cereal output of 3.7 million tonnes in 2017.

The continuation of the Government's input programme, which provides subsidised agricultural inputs including fertilizers, also supported this year's production gain. However, in localised pockets, dry spells in northern and southern areas, flood damage and an outbreak of fall armyworm (a new invasive species), are expected to have constrained yields in the affected areas. More information will be available following the release of the Government's vulnerability assessment, expected to be published in July.

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

Import needs decline on account of the larger harvest

As a result of the larger domestic output, imports of maize are expected at only minimal levels in the 2017/18 marketing year (April/March). Similarly, rice imports are forecast to fall moderately, as the increase in paddy production will satisfy a



larger proportion of the domestic consumption needs. In the previous marketing year, to compensate for both the reduced 2016 output (34 percent below the five-year average) and the significantly depleted stocks (household and public reserves), maize imports exceeded 0.5 million tonnes, a well above-average level.

Cereal prices fall on favourable supply conditions

Reflecting expectations of larger domestic maize supplies as well as harvest pressure, maize grain prices fell steeply between March and May; the national average maize price was 15 percent down on an annual basis. Rice prices also declined in recent months to similar levels of a year earlier. These decreases contributed to pushing down the annual inflation rate to 12.3 percent in May compared with 21.5 percent in the corresponding month of 2016.

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

Overall food security conditions are expected to improve this year on account of the improved supply situation that will help to augment households' stocks and declining cereal prices that will improve food access. However, lower tobacco production and reduced crop prices may constrain income opportunities for some farming households, partly offsetting the benefits of lower retail food prices.

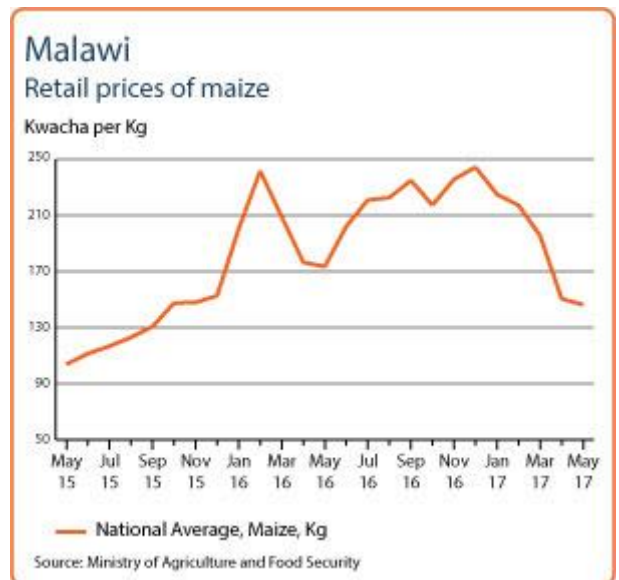
Results from the 2017 Malawi Vulnerability Assessment Committee's (MVACs) evaluation are yet to be released, but it is anticipated that the number of food insecure will be significantly lower than the estimated 6.7 million who required food assistance in 2016/17.

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Malawi
Cereal production

| | 2012-2016 average | 2016 | 2017 forecast | change 2017/2016 |
|--------------|-------------------|--------------|---------------|------------------|
| | 000 tonnes | | | percent |
| Maize | 3,278 | 2,369 | 3,464 | 46 |
| Rice (paddy) | 113 | 87 | 120 | 38 |
| Sorghum | 75 | 50 | 90 | 80 |
| Others | 35 | 21 | 36 | 71 |
| Total | 3,501 | 2,528 | 3,710 | 47 |

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



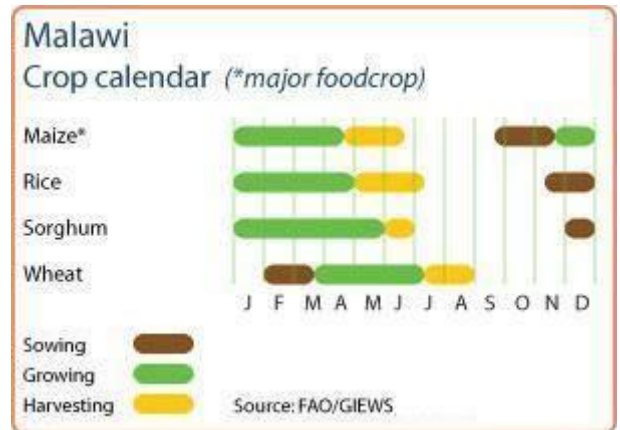


GIEWS Country Brief Malawi

Reference Date: 21-November-2016

FOOD SECURITY SNAPSHOT

- Above-average rainfall conditions forecast for 2016/17 cropping season, with planting underway
- Maize supplies tight on account of drought-reduced output in 2016 and depleted stocks
- National average maize price remains at near-record level
- Food security situation worsens significantly in 2016/17, mostly reflective of reduced 2016 cereal production and high food prices, with estimated 6.5 million people in need of assistance



Forecasts point to enhanced chance of above-average rainfall conditions during 2016/17 cropping season

Localized heavy rains were received in parts of the south and centre in November, prompting farmers to commence plantings in those areas, while land preparation is still ongoing in northern districts. Rainfall forecasts for the 2016/17 main summer cropping season (November-June) point to an enhanced chance for above-average rainfall conditions, indicating an early positive production outlook for the 2017 crops. As in previous years, the Government is supporting farmers through the Farm Input Subsidy Programme (FISP), which will benefit 900 000 farmers this season, down from 1.5 million farmers in the previous season. The FISP has also been modified to increase private sector participation, with farmers provided with coupons to purchase inputs directly from private traders, while legume seeds will also be distributed under the Programme in an effort to diversify agricultural production.

In addition, FAO is supporting the Government's efforts to improve agricultural input access through input trade fairs that will be implemented in ten districts. Currently, FAO and members of the Agriculture Cluster have planned to support 238 000 households with agricultural inputs during the main and the secondary (irrigated) seasons. This is in response to the impact of the drought-reduced 2016 harvest that limited income opportunities and consequently adversely affected farmers' productive capacity, particularly regarding their access to agricultural inputs. Although these programmes will help ameliorate the situation, plantings for the 2016/17 cropping season are likely to be constrained.

Malawi
Cereal production

| | 2011-2015 average | 2015 | 2016 estimate | change 2016/2015 |
|--------------|----------------------|--------------|------------------|---------------------|
| | 000 tonnes | | | percent |
| Maize | 3 583 | 2 776 | 2 369 | -15 |
| Rice (paddy) | 119 | 109 | 87 | -20 |
| Sorghum | 79 | 79 | 50 | -37 |
| Others | 38 | 35 | 19 | -46 |
| Total | 3 819 | 2 999 | 2 525 | -16 |

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

Maize supplies sharply reduced following poor harvest in 2016

The 2016 maize production is estimated at almost 2.4 million tonnes, approximately 15 percent down from the reduced harvest in 2015 and significantly lower than the previous five-year average. Prolonged dryness associated with the El Niño episode was the main reason behind the production decline and mainly affected central and southern cropping areas. Significant production declines were also recorded for rice, sorghum and millet. As a result, total cereal production stands at just over 2.5 million tonnes, 34 percent below the previous five-year average.

Moreover, cash crops (mainly tobacco and cotton) production is also estimated to have fallen in 2016.

Higher import needs in 2016/17 marketing year

As a result of the reduced 2016 cereal output and significantly depleted stocks (household and public reserves), the country's import needs in the 2016/17 marketing year (April/March) have risen significantly to approximately 0.7 million tonnes. While some of this volume is expected to be sourced from within the subregion, the bulk is anticipated to be procured from outside Southern Africa given the tight regional supply situation; moreover, the recent maize export ban in Zambia will further impede import opportunities. The Government allocated MWK 35.5 billion for the procurement of maize with financial support from international partners.

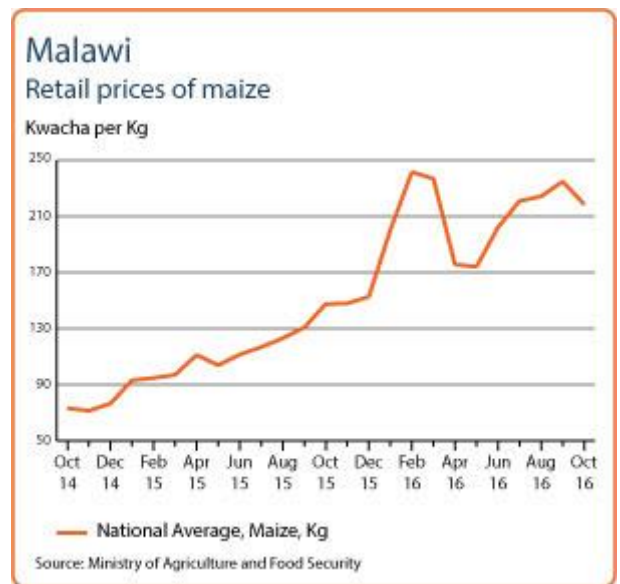
Maize prices remain at near-record levels

The national average maize grain price, following a moderate month-on-month decline, stood at MWK 219 per kg in October. At this level, the average price was nearly 50 percent higher than its year-earlier value. Most of this year's price gains stem from the tight supply situation and a higher reliance on imports, compounded by the weaker currency. Furthermore, inflationary pressure is expected to be sustained resulting from the recent increase in fuel prices in November (petrol costs increased by 4.6 percent and diesel by 6.4 percent).

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

Food security worsens significantly in 2016

As a result of the poor agricultural performance and high food prices, the number of food insecure who require emergency assistance in 2016/17 is estimated at 6.5 million, compared to the 2.84 million people categorized as food insecure in the previous year, according to the Malawi Vulnerability Assessment Committee's (MVAC) annual evaluation. The most affected districts are in the south and correspond to the areas that were most affected by the El Niño-induced dry conditions. In July, the Government released the Food Insecurity Response Plan to be implemented until March 2017, normally the end of the lean season. Under this programme, food assistance, through in-kind distributions, cash or vouchers, or a combination of these modalities, will be provided to the most food insecure in 24 of the



most affected districts identified by MVAC. Approximately 260 000 tonnes of cereals are required for the response plan.



GIEWS Country Brief Malawi

Reference Date: 22-September-2016

FOOD SECURITY SNAPSHOT

- Maize production declines in 2016 due to prolonged and severe dryness
- National average maize price rebounds after seasonal declines
- Food security situation in 2016/17 worsens significantly, mostly due to reduced 2016 cereal production, with estimated 6.5 million people in need of assistance

Tighter maize supplies following sharply reduced harvest in 2016

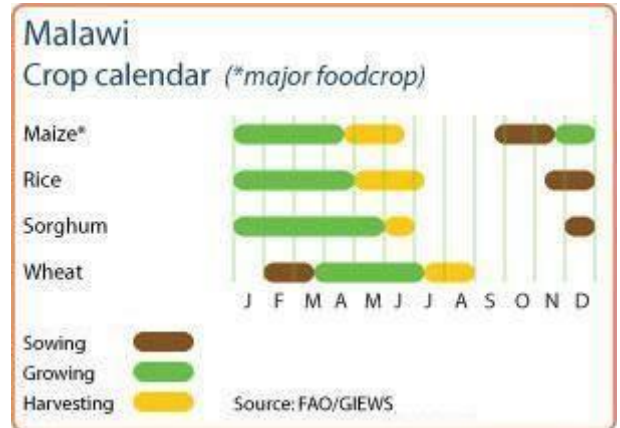
The main maize harvest was completed in July, with the minor winter irrigated crop to be harvested at the end of the year. The latest official estimate for maize production in 2016 stands at almost 2.4 million tonnes, about 15 percent lower than the reduced harvest in 2015 and significantly down on the previous five-year average. The delayed onset of seasonal rains and El Niño-induced dryness throughout most of the cropping season, particularly impacting the southern and central areas, were the main drivers behind this year's reduced harvest. More favourable conditions in northern districts resulted in near-average outputs in these areas and prevented a further reduction at the national level. Significant production declines were also recorded for rice, sorghum and millet, while the 2016 wheat crop is also estimated to have decreased.

Total cereal production is estimated at just over 2.5 million tonnes, 16 percent down on last year and 34 percent below the previous five-year average.

Moreover, cash crop (mainly tobacco and cotton) production is also estimated to have fallen in 2016.

Maize imports forecast rise significantly in 2016/17

As a result of the reduced 2016 cereal output and low carryover stocks, the country is expected to significantly increase imports in the 2016/17 marketing year (April/March). Imports of maize are forecast at over 0.5 million tonnes and, while some quantities are expected to be sourced from within the region, the bulk is anticipated to be procured from outside Southern Africa given the tight regional supply situation. In addition, although there is a strong preference for the consumption of white maize, the relatively low availability on the international market compared to



| | 2011-2015 average | 2015 | 2016 estimate | change 2016/2015 |
|--------------|-------------------|--------------|---------------|------------------|
| | 000 tonnes | | | percent |
| Maize | 3 583 | 2 776 | 2 369 | -15 |
| Rice (paddy) | 119 | 109 | 87 | -20 |
| Sorghum | 79 | 79 | 50 | -37 |
| Others | 38 | 35 | 19 | -46 |
| Total | 3 819 | 2 999 | 2 525 | -16 |

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



yellow maize may result in the importation of yellow maize for human consumption.

Maize prices rebound following seasonal decreases

The national average maize grain price remained firm in August, following a two-month increase. At MWK 221 per kg, the average price was 80 percent higher than its year-earlier value. Most of this year's price gains stem from the tight supply situation and a higher reliance on imports. The weaker currency, kwacha, compared to year-earlier values, has also added inflationary pressure.

Food security worsens significantly in 2016

As a result of the poor agricultural performance and high food prices, the number of food insecure in 2016/17 has increased to 6.5 million, up from an estimated 2.84 million people in the previous year, according to the Malawi Vulnerability Assessment Committee's (MVAC) annual evaluation. The most affected districts are in the south and correspond to the areas that were most affected by the El Niño-induced dry conditions. In July, the Government released the Food Insecurity Response Plan to be implemented until March 2017, normally the end of the lean season. Under this programme, food assistance, through in-kind distributions, cash or vouchers, or a combination of these modalities, will be provided to the most food insecure in 24 of the most affected districts identified by MVAC. Approximately 260 000 tonnes of cereals are required for the response plan. In addition, an estimated 1.85 million people are expected to receive agricultural support, including the provision of crop and livestock inputs.



GIEWS Country Brief Malawi

Reference Date: 04-July-2016

FOOD SECURITY SNAPSHOT

- Maize production decreases sharply in 2016 due to prolonged and severe dryness
- National average maize price fell seasonally from record high in February, but remains at an elevated level
- Food security situation in 2016/17 worsens significantly, mostly due to reduced 2016 cereal production, with an estimated 6.5 million people in need of assistance

Maize production in 2016 estimated at sharply reduced level

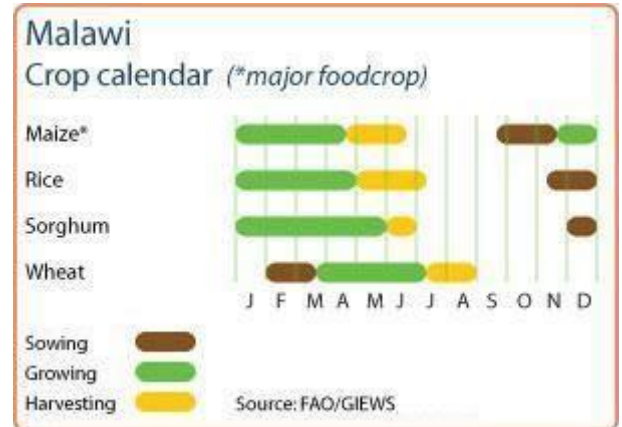
With the 2016 main season cereal harvest virtually complete, the maize output is estimated at about 2.4 million tonnes, based on the Government's third round assessment. This level is fractionally below the second round assessment's estimate and about 15 percent lower than the below-average production of 2015. The delayed onset of seasonal rains and El Niño-induced dryness throughout most of the cropping season, particularly impacting the southern and central areas, are the main drivers behind the year-on-year production decline. More favourable conditions in northern districts resulted in near-average output in these areas and prevented a further reduction at the national level. Significant production declines were also recorded for rice, sorghum and millet, while the 2016 wheat crop, to be harvested from July, is also anticipated to fall.

Total cereal production is estimated at 2.5 million tonnes, about 16 percent down on last year and 34 percent below the previous five-year average.

Cash crop (mainly tobacco and cotton) production is also estimated to have fallen in 2016.

Maize import requirements significantly higher in 2016/17

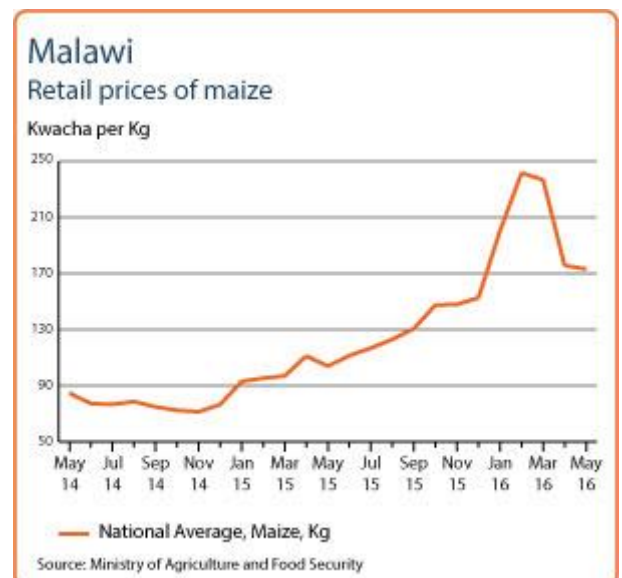
As a result of the reduced 2016 cereal output and low carryover stocks, the country is expected to significantly increase imports in the 2016/17 marketing year (April/March). Imports of maize are forecast to be over 0.65 million tonnes and, while some quantities are expected to be sourced from within the region, the bulk is anticipated to be procured from outside southern Africa given the tight regional supply situation. In addition, although there is a



Malawi Cereal production

| | 2011-2015 average | 2015 | 2016 estimate | change 2016/2015 |
|--------------|-------------------|--------------|---------------|------------------|
| | 000 tonnes | | | percent |
| Maize | 3 583 | 2 776 | 2 369 | -15 |
| Rice (paddy) | 119 | 109 | 87 | -20 |
| Sorghum | 79 | 79 | 50 | -37 |
| Others | 38 | 35 | 19 | -46 |
| Total | 3 819 | 2 999 | 2 525 | -16 |

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



strong preference for the consumption of white maize, the relatively low availability on the international market compared to yellow maize may result in the importation of yellow maize for human consumption.

Maize prices fall seasonally, but still remain at high levels

The national average maize price reached a record high in February 2016, with 1 kg of maize costing MWK 242. Shortly afterwards, prices decreased seasonally with the early 2016 harvest alleviating supply pressure. In May, the national average price fell by 30 percent from the record of February to MWK 173 per kg, but still remained 56 percent up on its year earlier value. The drought-reduced 2016 cereal output and overall tight supply situation, both in the country and the subregion, are the main drivers behind the elevated price levels.

Food security worsens significantly in 2016

As a result of the poor agricultural performance and high food prices, the number of food insecure in 2016/17 has increased to 6.5 million, up from the revised estimate of 2.84 million people in the previous year. The most affected districts are in the south and correspond to the areas that were most affected by the El Niño-induced dry conditions. Approximately 375 000 tonnes of maize are required to assist the most affected food insecure population.

Reference Date: 11-March-2016

FOOD SECURITY SNAPSHOT

- Below-average rains expected to result in reduced 2016 maize crop, with larger production declines forecast in southern districts
- National average maize price at record high level in February 2016, reflecting tighter market supplies and poor 2016 production prospects
- Food security situation in 2016/17 expected to worsen due to high food prices and expected lower cereal output

Reduced seasonal rains expected to result in production decrease for 2016 crops

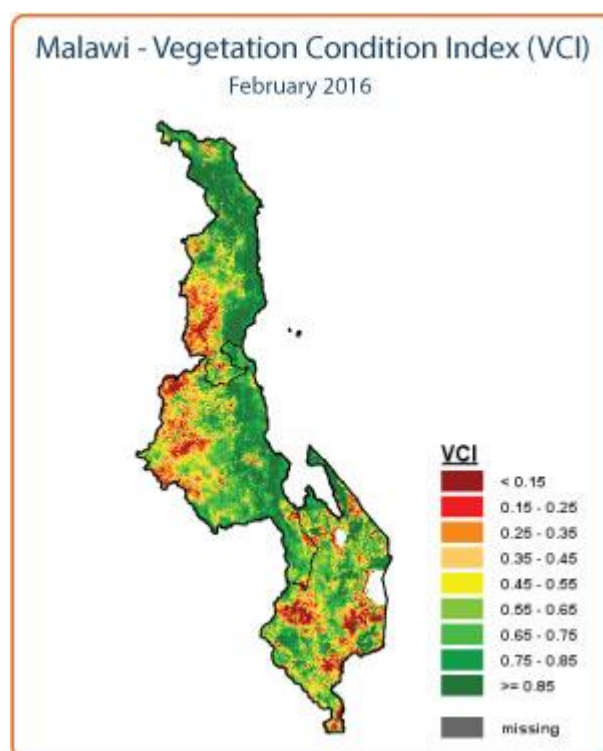
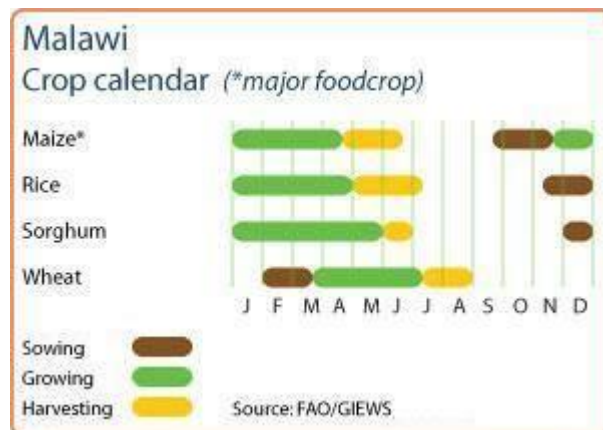
Harvesting of the 2016 cereal crops is expected to begin in late April. Preliminary indications point to a lower cereal output in 2016, largely attributed to erratic rains since the start of the 2015/16 cropping season (October/June) that are associated with the prevailing, but currently weakening, El Niño episode. The southern districts, which account for a comparatively small amount of national cereal output, and parts of the Central Region have been the most affected by the unfavourable weather. Below-average vegetation conditions in these areas indicate an increased likelihood of reduced yields. Furthermore, the delayed start of seasonal rains and subsequently reduced volumes are expected to result in a contraction in the area harvested compared to the previous year, further weighing down production expectations in 2016. Crop conditions are more favourable in northern districts and harvests in these areas may somewhat compensate for lower harvests in the south and centre. Overall, early forecasts point to a below-average national maize crop of about 2.7 million tonnes in 2016, slightly below the 2015 output.

For cash crops, tobacco production is anticipated to rise marginally from the reduced level of 2015, while by contrast, production of cotton is forecast to decline sharply in 2016.

Tighter supplies in 2015/16 marketing year

The 2015 maize output was estimated at 2.8 million tonnes, 30 percent lower than the record 2014 harvest. The decrease reflects severe dry periods that resulted in a drop in average yields by about one-fifth compared to the high level of 2014, and the impact of floods. The Post Disaster Needs Assessment Report of March 2015 estimates that the floods resulted in USD 13.6 million of losses to the agriculture sector, including the damage to infrastructure. Overall, 2015 cereal production was estimated at a below-average level of 3 million tonnes, nearly one-third lower than the record 2014 harvest.

On account of the lower 2015 cereal harvest, both national and household stocks are estimated to be sharply reduced in the nearly-concluded 2015/16 marketing year (April/March), with Malawi importing about 100 000 tonnes of maize from Zambia to boost national supplies.



Malawi Cereal production

| | 2010-2014 average | 2014 | 2015 estimate | change 2015/2014 |
|--------------|-------------------|--------------|---------------|------------------|
| | 000 tonnes | | | percent |
| Maize | 3 711 | 3 978 | 2 776 | -30 |
| Rice (paddy) | 119 | 132 | 109 | -17 |
| Sorghum | 74 | 93 | 79 | -15 |
| Others | 36 | 43 | 35 | -19 |
| Total | 3 941 | 4 246 | 2 999 | -29 |

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

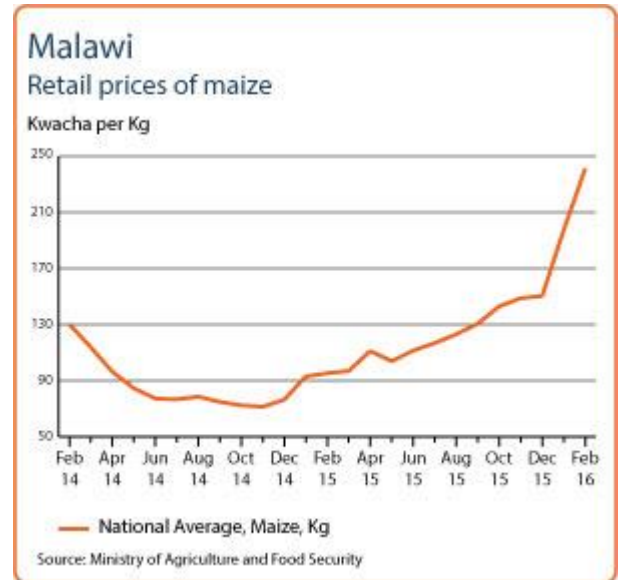
Maize prices increased sharply, reaching new record levels in 2016

The national average maize price rose steeply at the start of 2016, reaching a new record level in February 2016. At MWK 241 per kg, maize grain prices were more than double their year-earlier value. The main drivers behind the elevated level are the tight supply situation and poor 2016 production prospects, while the depreciation of the currency contributed to exacerbating the upward trend.

Food security conditions expected to worsen

Currently, an estimated 2.84 million people require food assistance in 25 districts, up from 640 000 persons estimated in 2014/15. The current food insecurity situation is a result of the overall decrease in food production in 2015 and the impact of the floods. Humanitarian assistance is being provided to the food insecure population and is expected to continue until the end of March 2016.

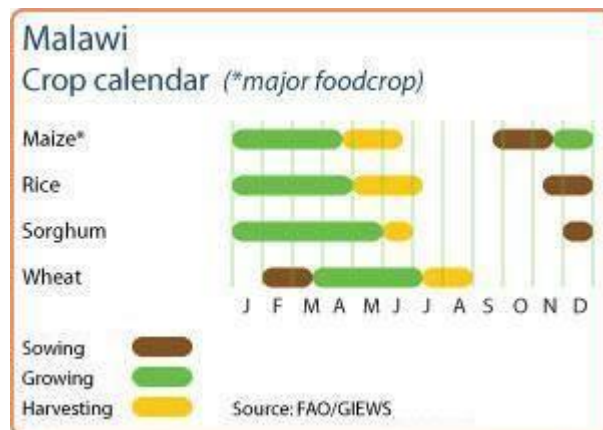
Although the arrival of new supplies from the 2016 harvest will assist in improving the situation in the immediate period, overall food security conditions are expected to deteriorate in 2016/17, reflecting an expected second consecutive below-average cereal harvest in 2016, and high food prices.



Reference Date: 14-January-2016

FOOD SECURITY SNAPSHOT

- **Below-average rains since start of 2015/16 cropping season in central and southern districts adversely impact early crop development, but conditions in north are generally satisfactory**
- **Maize production in 2015 declined sharply to a below-average level**
- **National average maize price at record high level in December 2015, reflecting tighter market supplies**
- **Tight food security situation in 2015/16 due to reduced 2015 crop production as a result of flood damage and prolonged dry spells**



Suppressed rains at start of 2015/16 cropping season adversely impact crop conditions in centre and south

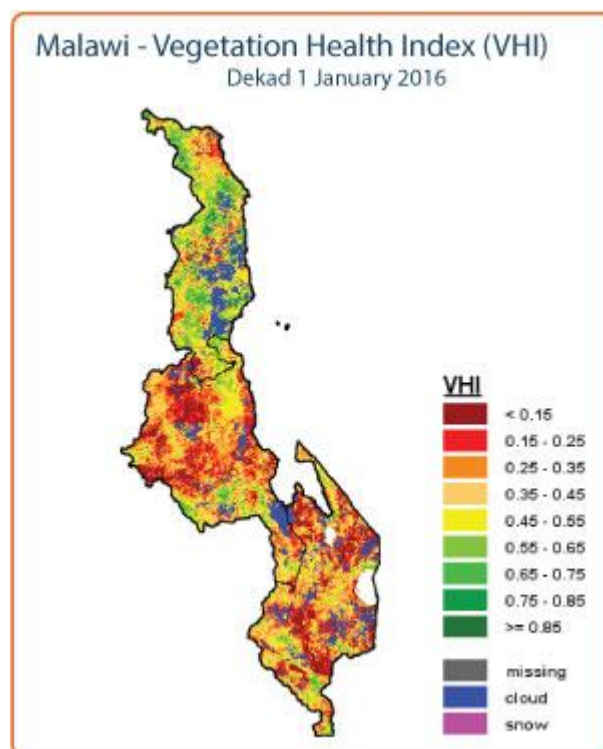
Planting of the 2016 cereal crops concluded in December, under generally satisfactory conditions in northern districts, while drier conditions in the Central and Southern regions resulted in delayed plantings and adversely impacted early crop growth. Harvesting of the cereal crops is expected to commence in May.

The erratic rains since the start of the 2015/16 cropping season (October/June) are associated with the prevailing strong El Niño episode. Reports indicate that some districts in the south and centre have already experienced localized crop wilting due to the dryness, while the severe moisture deficits have also prevented planting from taking place in localized areas of the Southern Region. Although Malawi is normally less affected by the impact of El Niño compared to neighbouring countries to the south, rainfall forecasts point to below-average rains in central and southern parts until the start of the harvesting period, resulting in unfavourable production prospects with negative implications for food security.

Following the sharp decrease in the 2015 cereal output, a joint Government/UN Humanitarian National Response Plan was initiated in 2015, with components focusing on agriculture and food security. Support to the agriculture sector included input assistance and investment in irrigation infrastructure. As of November 2015, 231 000 households in 23 districts were identified to receive support, however, a lack of funding has impeded the implementation of some activities supporting the livestock sector.

Tighter supplies in 2015/16 marketing year

The 2015 maize output was estimated at 2.9 million tonnes, 27 percent lower than the record 2014 harvest. The decrease reflects severe dry periods that resulted in a drop in average yields by about one-fifth compared to the high level of 2014. In addition flooding, which mostly affected the southern districts of Mulanje, Nsanje, Mangochi and Chikwawa, destroyed 89 100 hectares of cropped land and resulted in the loss of 195 032 animals. The Post Disaster Needs Assessment



Malawi Cereal production

| | 2010-2014 average | 2014 | 2015 estimate | change 2015/2014 |
|--------------|-------------------|--------------|---------------|------------------|
| | 000 tonnes | | | percent |
| Maize | 3,701 | 3,929 | 2,877 | -27 |
| Rice (paddy) | 119 | 131 | 120 | -8 |
| Sorghum | 74 | 92 | 85 | -8 |
| Others | 36 | 43 | 38 | -12 |
| Total | 3,931 | 4,195 | 3,120 | -26 |

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

Report from March 2015, estimates that the floods resulted in USD 13.6 million of losses to the agriculture sector, including the damage to infrastructure. Overall, 2015 cereal production is estimated at a below-average level of 3.1 million tonnes, about one-quarter lower than the record 2014 harvest.

On account of the lower 2015 cereal harvest, both national and household stocks are estimated to be sharply reduced in the 2015/16 marketing year, with Malawi importing about 90 000 tonnes of maize from Zambia to boost national supplies.

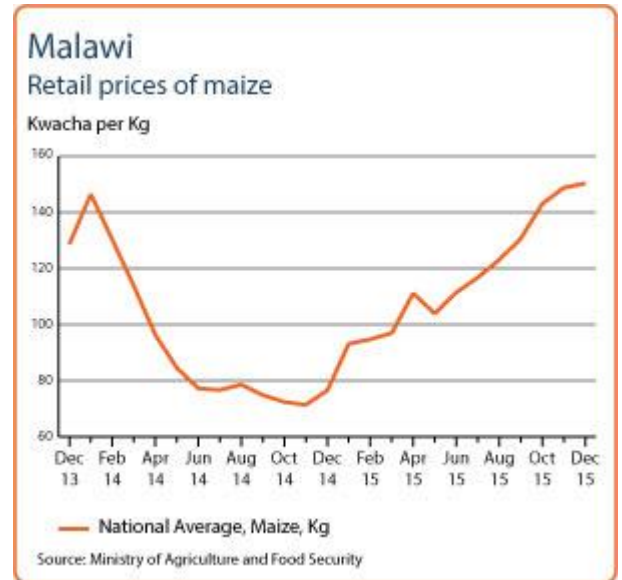
Maize price at record level in December 2015

The national average maize price reached a record level in December 2015, and at MWK 150 per kg was nearly double its year earlier value. The main driver behind the elevated level is the tight supply situation, while the depreciation of the currency during 2015 contributed to exacerbating the upward trend. The highest prices in December were recorded in the Southern Region, up to MWK 190 per kg, while lower prices were observed in northern markets.

Large number of food insecure in southern districts

Currently, an estimated 2.84 million people require food assistance in 25 districts, up from 640 000 persons in the previous year. The current food insecurity situation is a result of the overall decrease in food production in 2015 and the impact of the floods earlier in the year, which prompted the Government to declare a state of national disaster. About 0.89 million of the total number of food insecure were affected by the floods, while 1.95 million suffered from the dry spell that reduced their harvests. Food assistance programmes are being implemented, through both in-kind support and cash-based schemes. However, funding gaps for the Humanitarian National Response Plan may result in curtailed operations from February.

Although the country tends to be less affected by El Niño weather patterns, the early erratic rainfall in parts of the centre and south, combined with forecasts of below-average rains in southern parts, may result in a second consecutive reduced harvest, further aggravating food security.



Reference Date: 06-August-2015

FOOD SECURITY SNAPSHOT

- Production of maize in 2015 declined sharply to below-average level, as a result of extended dry period, as well as flooding in southern parts of the country
- National average maize price in July above its year-earlier level, reflecting tighter market supplies
- Steep increase in number of people requiring food assistance in 2015/16 due to reduced supplies and flood damage

Cereal production decreases sharply in 2015

Harvesting of the 2015 maize crop, representing over 90 percent of the total national cereal output, was completed in June and production, is estimated at about 2.9 million tonnes, 27 percent lower than the record 2014 harvest. The sharp decrease follows an extended period of dry weather which affected crops during a critical development stage in the first quarter of 2015, which caused a drop in yields by about one-fifth compared to the high level of 2014. In addition, severe flooding, mainly impacting southern districts of Mulanje, Nsanje, Mangochi and Chikwawa, caused widespread crop losses, in total destroying 89 100 hectares of cropped land and resulting in the loss of 195 032 animals. The Post Disaster Needs Assessment report from March 2015, estimates that the floods resulted in USD 13.6 million of losses to the agriculture sector, including the damage to infrastructure.

Production of other cereals also decreased. Sorghum and millet declined by 8 and 12 percent, respectively, while the rice output is estimated 8 percent lower than the above-average level of 2014. Overall, cereal production is estimated at a below-average level of 3.1 million tonnes, one-quarter lower than the record 2014 harvest. This year's output is the lowest since 2008.

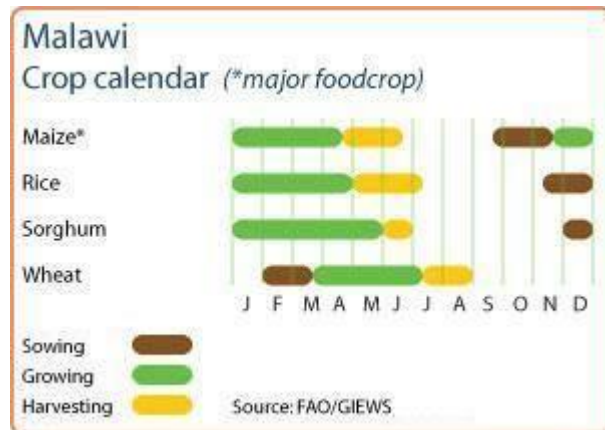
Production of cotton, a main cash crop, fell by 31 percent. By contrast, small increases were registered for pulses, pigeon peas and beans.

In consideration of the presence of an El Niño weather phenomenon, which is historically associated with reduced rainfall levels compared to the average in Malawi, the possibility of a subsequent poor 2015/16 cropping season (October-June), is elevated. GIEWS will continue to monitor climate forecasts and weather conditions for the forthcoming season.

Increasing maize prices persist throughout 2015

The national average maize price has been increasing since late 2014, including during the harvest period (April and June) when prices tend to decline, reflecting the reduced 2015 output and the impact of floods that disrupted trade flows and consequently decreased market supplies. The national average maize price in July was 54 percent higher than its year earlier level.

Sharp deterioration in food security conditions in



Malawi Cereal production

| | 2010-2014 average | 2014 | 2015 estimate | change 2015/2014 |
|--------------|-------------------|-------|---------------|------------------|
| | 000 tonnes | | | percent |
| Maize | 3,701 | 3,929 | 2,877 | -27 |
| Rice (paddy) | 119 | 131 | 120 | -8 |
| Sorghum | 74 | 92 | 85 | -8 |
| Others | 36 | 43 | 38 | -12 |
| Total | 3,931 | 4,195 | 3,120 | -26 |

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



2015/16

As a result of the overall decrease in food production and the impact of the floods earlier in the year, which prompted the Government to declare a state of national disaster, the Malawi Vulnerability Assessment Committee (MVAC) reports that about 2.8 million people will require food assistance for a period of three to six months from October 2015 to March 2016 (the main lean period). This is a significant increase from last year, when an estimated 640 000 persons were assessed to be food insecure. The maize tonnage required to support the food insecure population is estimated at 124 183 tonnes.

About 886 000 of the total number of food insecure were affected by the floods, while 1.95 million suffered from the dry spell that reduced their harvests. In total, 25 districts, mainly in the south were impacted, with Balaka, Chikwawa, Mangochi, Mzimba and Zomba the main affected districts.

Furthermore, the higher maize prices are expected to constrain access and further exacerbate the already poor food insecurity conditions.

Reference Date: 18-May-2015

FOOD SECURITY SNAPSHOT

- Heavy rains and floods in southern parts of the country resulted in crop losses
- National average maize prices remain stable due to good harvest in 2014
- Emergency food assistance is being provided to flood-affected households

Poor prospects for current crops, following floods, prolonged dry spells and early cessation of rainfall

Harvesting of the 2015 maize crop started in late April/May and is expected to be completed by June.

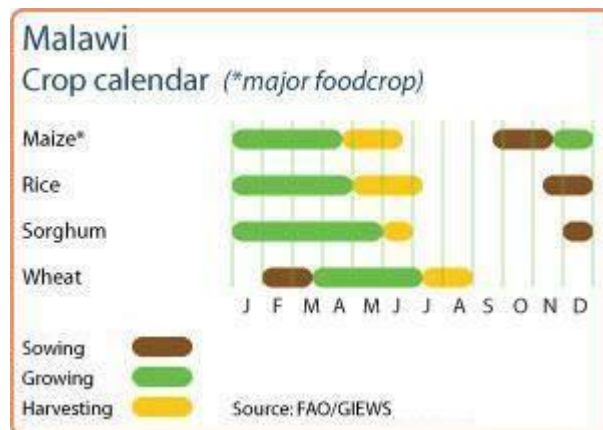
A reduced output is expected following erratic weather. Heavy rainfall in January 2015, which led to widespread flooding in the south and central regions, was preceded by dry conditions from October to mid-December 2014, which delayed planting by up to one month and hindered early crop development. As of 10 April 2015 crop estimates indicated that production is expected to decline by about 28 percent compared to last year. However, in areas not affected by flooding, the abundant rains have helped to diminish early seasonal water deficits and improve maize crop conditions. Reports also indicate large-scale livestock mortality in the flood-affected areas.

Staple food prices increased significantly due to limited supplies

The floods disrupted trade flows and the consequent decreases in market supplies exerted upward pressure on food prices, particularly in the most affected southern districts. However, maize prices still remain relatively low as a result of the overall favourable maize supply situation due to the good harvest in 2014.

Emergency food assistance required for flood-affected households

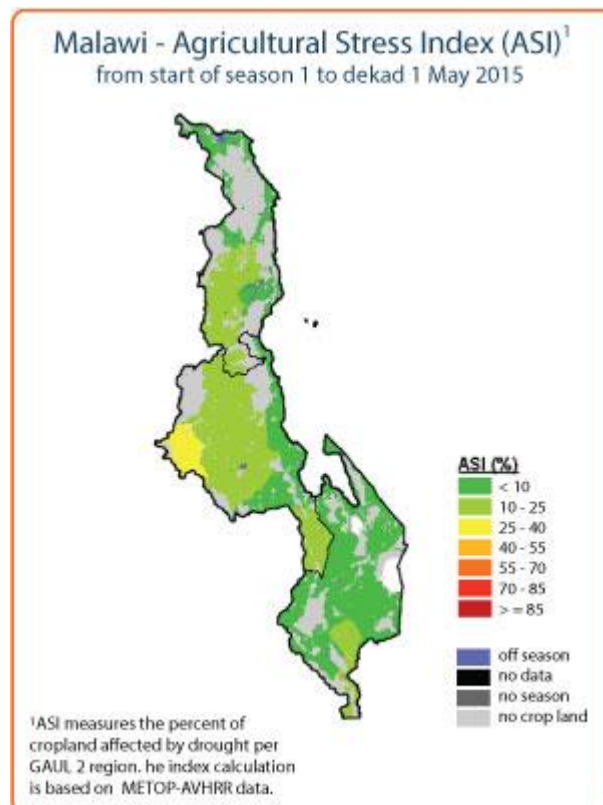
Food security conditions have been adversely affected by the floods in the south, particularly the districts of Nsanje, Chikwawa and Phalombe. A state of national disaster was declared across 15 districts, with an estimated 1.14 million people and 63 976 hectares of cropped land affected, and 336 000 people displaced in the worst affected districts, as of mid-April 2015. According to the results from a recent food security assessment, the number of flood victims who require assistance between April and July 2015 has risen to an estimated 10.6 million people. WFP is planning to provide food assistance to approximately 368 000 persons for up to six-and-a-half months. FAO, together with partners, is prepared to provide agricultural inputs to the most vulnerable affected households. There is an ongoing MVAC market assessment in the flood-affected areas that will further determine the mode of assistance to be adopted.



Malawi
Cereal production

| | 2010-2014 average | 2014 | 2015 forecast | change 2015/2014 |
|--------------|-------------------|--------------|---------------|------------------|
| | 000 tonnes | | | percent |
| Maize | 3 701 | 3 929 | 2 900 | -26 |
| Rice (paddy) | 119 | 131 | 120 | -8 |
| Sorghum | 74 | 92 | 85 | -8 |
| Others | 36 | 43 | 38 | -12 |
| Total | 3 931 | 4 195 | 3 143 | -25 |

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



Malawi Retail prices of maize

Kwacha per Kg



— National Average, Kg
Source: Ministry of Agriculture and Food Security

Reference Date: 29-January-2015

FOOD SECURITY SNAPSHOT

- Heavy rains in southern areas during January 2015 caused flooding, resulting in crop losses and deterioration in food security conditions
- National average maize prices declined throughout 2014 in response to overall improved supply situation in 2014/15
- Floods caused sharp deterioration in food security conditions in southern areas, with emergency food assistance being provided to affected households

Floods, following prolonged dry spell, cause crop losses

Consistent and heavy rains since early January 2015 have resulted in flooding, mainly impacting the Southern region. During the first two dekads of January, estimates indicate that rainfall levels were more than twice the average for this period (see graph on the right). This marks a reversal of the dry conditions experienced from October to mid-December 2014, which delayed planting of the 2015 cereal crops, to be harvested from April, by up to one month and hindered early crop development. Preliminary estimates indicate that up to 35 000 hectares of cropped land have been potentially affected by the floods, impacting about 116 000 farmers. Although this represents a small portion of the area planted at the national level, production losses will have a significant impact on localized food supplies. However, in areas not affected by flooding, the abundant rains have helped to diminish early seasonal water deficits and improved maize crop conditions. Reports also indicate large-scale livestock mortality in the flood-affected areas.

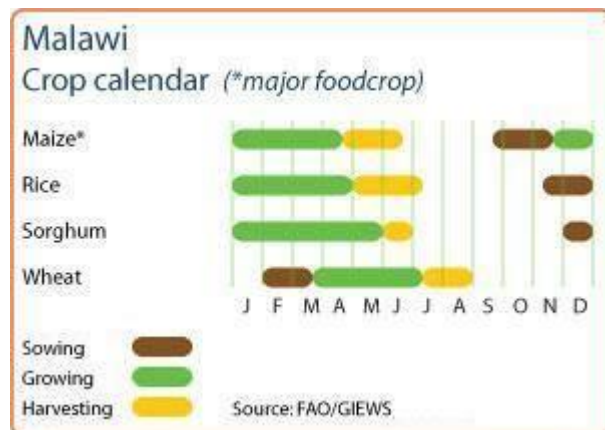
Overall favourable maize supplies in 2014/15

The 2014 crop was estimated at 3.9 million tonnes, about 8 percent up on the average 2013 harvest, on account of an expansion in the area planted and a small increase in yields. However, some districts in the north (Karonga), centre (Dedza and Ntcheu) and south (Balaka, Chikwawa, Nsanje, Neno, Blantyre and Mulanje) experienced prolonged dry spells, resulting in reduced localized outputs. Total cereal production is estimated at about 4.2 million tonnes, nearly 300 000 tonnes (8 percent) above last year and the average of the previous five years. Given the bumper 2014 harvest, the country is estimated to have retained a large maize surplus.

Maize prices remain lower than previous year

Reflecting the bumper 2014 cereal harvest, maize prices decreased throughout most of 2014 to levels well below the previous year. In December, at MWK 78 per kg, the national average price was about 40 percent down on its year-earlier level. The stabilization and slight strengthening of the national currency (kwacha) since December 2014 is also expected to help ease inflationary pressure. However, the annual national inflation rate still remained at a high level, estimated at about 24 percent in December 2014.

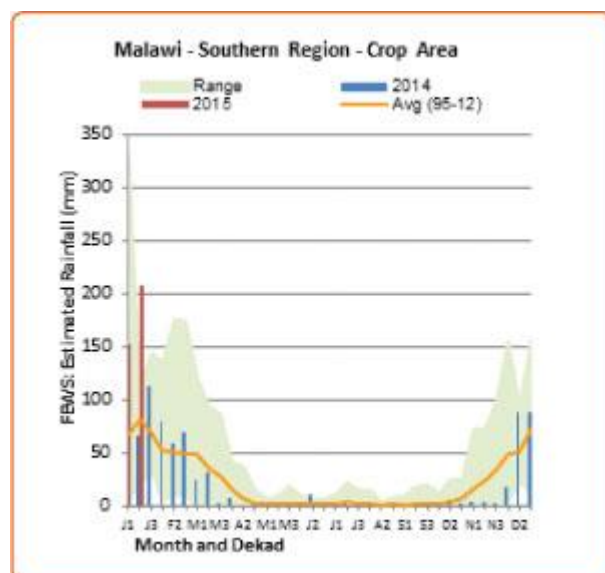
The floods are expected to have disrupted trade flows. Consequent



Malawi Cereal production

| | 2009-2013 average | 2013 | 2014 estimate | change 2014/2013 |
|--------------|-------------------|--------------|---------------|------------------|
| | 000 tonnes | | | percent |
| Maize | 3 648 | 3 640 | 3 929 | 8 |
| Rice (paddy) | 120 | 125 | 131 | 5 |
| Sorghum | 68 | 86 | 92 | 7 |
| Others | 34 | 41 | 43 | 5 |
| Total | 3 869 | 3 892 | 4 195 | 8 |

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



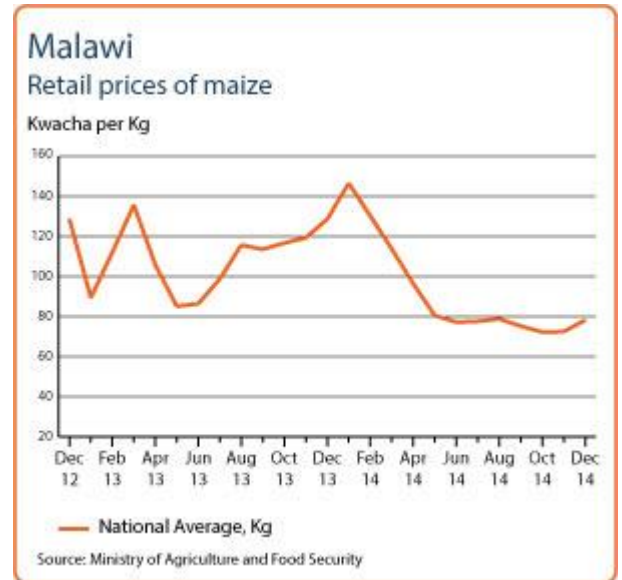
decreases in market supplies may exert upward pressure on food prices, particularly in the most affected southern districts.

Emergency food assistance required for flood-affected households

Food security conditions have been adversely affected by the floods in the south, particularly the districts of Nsanje, Chikwawa and Phalombe. The President of Malawi declared a state of national disaster across 15 districts, with an estimated 638 000 people and 35 000 hectares of cropped land affected, and 174 000 people displaced in the worst affected districts, as of 27 January 2015. Preliminary assessments indicate the loss of displaced households' food supplies, while crop and livestock losses are expected to constrain households' food availability in 2015. WFP is planning to provide food assistance to approximately 368 000 persons for up to six-and-a-half months. FAO, together with partners, is planning to provide agricultural inputs to the most vulnerable affected households.

Heavy downpours are expected in the next week in southern parts of the country, which may cause further flooding and exacerbate the current situation.

In 2014, the Vulnerability Assessment Committee (MVAC) had previously estimated that 640 009 persons were food insecure, a sharp decrease compared with the 1.46 million people estimated in the previous year. The lower number reflected the overall improved food availability and access in 2014, following the larger maize harvest and reduced prices.



Reference Date: 06-January-2015

FOOD SECURITY SNAPSHOT

- Delayed and subsequently below-average cumulative rains since October 2014 impeded planting of 2015 cereal crops
- National maize supplies are favourable, following bumper 2014 harvest
- National average maize price declines throughout 2014 in response to improved supply situation
- Overall, food security conditions improved in 2014, but areas where production declines were recorded remain a concern

Below-average rains delayed planting and hindered early development of 2015 cereal crops

Delayed and overall below-average cumulative rains since the start of the rainy season in October have adversely affected the 2015 cereal crops, to be harvested by May. However, heavier rains in late December helped to partially replenish soil moisture levels, particularly in southern areas. Most areas have received less than half the average rainfall between October and December, and as a result vegetation conditions were below average as of late December. Reports indicate that planting was delayed by about one month, whilst in areas where farmers were able to plant, moisture deficits hindered early crop development. The delayed and poor start of the 2014/15 cropping season (October-June) is likely to shorten the season and could restrict yield potential of the 2015 maize crop. Good rains have been forecast for rest of January 2015.

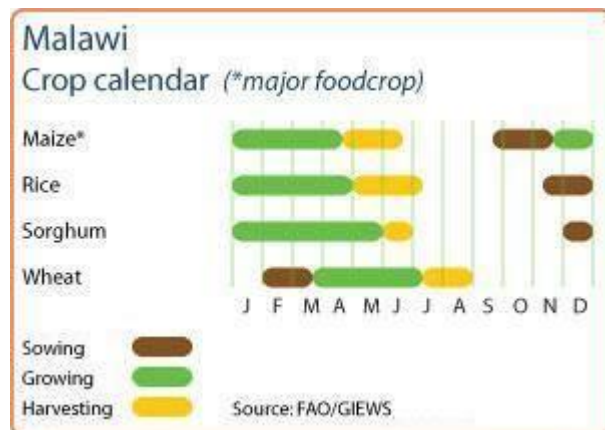
Bumper maize output estimated in 2014

The 2014 crop was estimated at 3.9 million tonnes, about 8 percent up on the average 2013 harvest, on account of an expansion in the area planted and a small increase in yields. However, some districts in the north (Karonga) and south (Balaka, Dedza, Ntcheu, Chikwawa, Nsanje, Neno, Blantyre and Mulanje) experienced prolonged dry spells, resulting in reduced localized outputs. Total cereal production is estimated at about 4.2 million tonnes, nearly 300 000 tonnes (8 percent) above last year and the average of the previous five years. Given the bumper 2014 harvest, the country retained a large maize surplus.

Larger maize supplies push prices down

Reflecting the bumper 2014 cereal harvest, maize prices decreased throughout most of 2014 to levels well below the previous year. In November, at MWK 72 per kg, the national average price was about 40 percent down on its year earlier level. The stabilization and slight strengthening of the national currency (kwacha) since December 2014 is also expected to help ease inflationary pressure. However, the annual national inflation rate still remained at a high level, estimated at about 24 percent in November 2014.

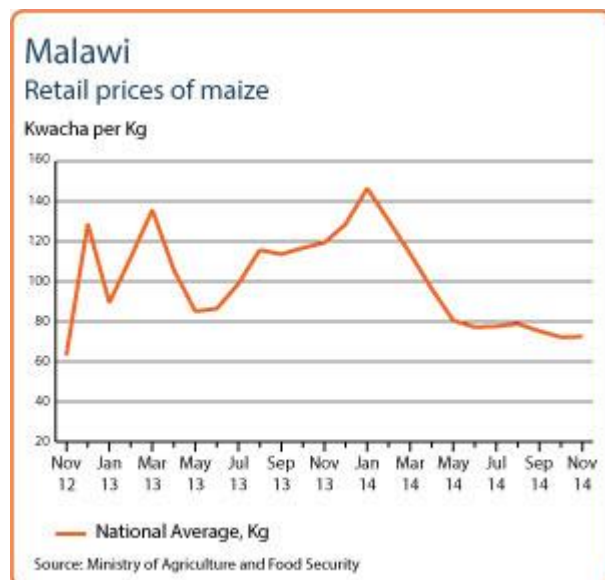
Food security conditions improved in 2014



Malawi Cereal production

| | 2009-2013 average | 2013 | 2014 estimate | change 2014/2013 |
|--------------|-------------------|--------------|---------------|------------------|
| | 000 tonnes | | | percent |
| Maize | 3 648 | 3 640 | 3 929 | 8 |
| Rice (paddy) | 120 | 125 | 131 | 5 |
| Sorghum | 68 | 86 | 92 | 7 |
| Others | 34 | 41 | 43 | 5 |
| Total | 3 869 | 3 892 | 4 195 | 8 |

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



An estimated 640 009 persons were assessed to be food insecure in 19 districts by the 2014 Vulnerability Assessment Committee (MVAC), a sharp decrease compared with the 1.46 million people estimated in the previous year. The lower number reflects improved food availability and access in 2014, following the larger maize harvest and sharply reduced prices. Food assistance to the affected population is being provided in-kind and through cash transfers.

Reference Date: 09-September-2014

FOOD SECURITY SNAPSHOT

- Favourable national maize supplies, following bumper 2014 harvest
- Maize prices decrease sharply in response to the improved supply situation
- Overall, food security conditions improve in 2014, but areas where production declines were recorded remain a concern

Improved national maize supplies following bumper 2014 harvest

The 2014 national maize crop, harvested between May and June, was estimated at 3.9 million tonnes, about 8 percent up on the above-average 2013 harvest. In general, rainfall was favourable for cereal production, and together with the continuation of the Farm Input Subsidy Programme (FISP), contributed to a minor increase in average yields (+6 percent to 2.3 tonnes per hectare). In addition, a small expansion in area planted augmented this year's overall maize production.

However, some districts in the north (Karonga) and south (Balaka, Dedza, Ntcheu, Chikwawa, Nsanje, Neno, Blantyre and Mulanje) experienced prolonged dry spells during the crucial maize grain-filling stage between February and April, limiting yields and consequently reducing production.

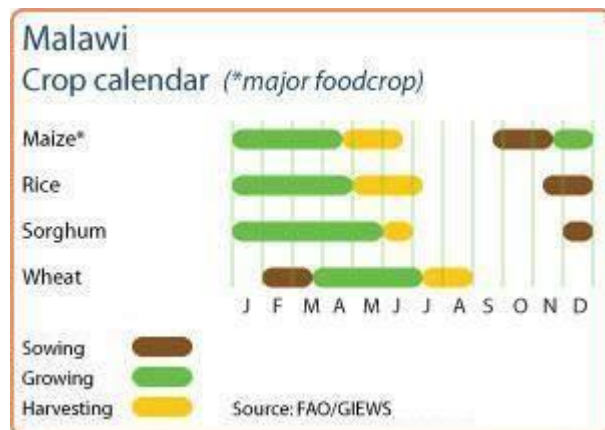
Rice and sorghum also registered production increases of 5 and 7 percent respectively, while millet and wheat outputs are estimated to have remained relatively unchanged compared to the preceding year's harvest. Accordingly, total cereal production is estimated at about 4.2 million tonnes, about 300 000 tonnes (8 percent) above last year and the average of the previous five years. Given this year's large harvest, the country is expected to retain a maize surplus of over 1 million tonnes.

In regard to cash crops, tobacco recorded a sharp 27 percent increase, while by contrast there was a 16 percent decline in the cotton output due to constrained access to inputs and the dry spell in southern cotton growing areas.

Forecasts point to favourable rains for the 2014/15 cropping season

Recently released rainfall forecasts for the 2014/15 cropping season (with plantings beginning from October) indicate an increased chance of normal to above normal rains for the October 2014-March 2015 period. These rainfall predictions also take into account the possibility of an El Niño occurrence, which is usually associated with periods of below average rains in parts of Southern Africa; current forecasts for an El Niño occurrence have been downgraded from earlier estimates and point to only a 60-65 percent probability that an episode will transpire in the last quarter of 2014.

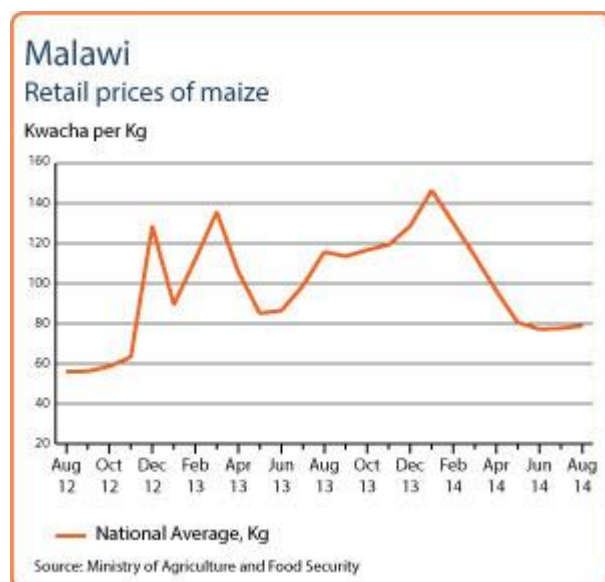
Prices declined sharply in response to the large



Malawi Cereal production

| | 2009-2013 average | 2013 | 2014 estimate | change 2014/2013 |
|--------------|-------------------|--------------|---------------|------------------|
| | 000 tonnes | | | percent |
| Maize | 3 648 | 3 640 | 3 929 | 8 |
| Rice (paddy) | 120 | 125 | 131 | 5 |
| Sorghum | 68 | 86 | 92 | 7 |
| Others | 34 | 41 | 43 | 5 |
| Total | 3 869 | 3 892 | 4 195 | 8 |

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



maize harvest

Reflecting the larger maize output in 2014, the national average maize price decreased sharply between March-June and remained comparatively stable in two following months. At MWK 79 per kg, the price of maize in August was nearly 32 percent below its level of a year earlier. The stabilization of the kwacha, the national currency, following a small appreciation against the US dollar earlier in the year, also contributed to easing of inflationary pressure. Furthermore, the 5 percent decrease in national fuel prices, announced by the Malawi Energy Regulatory Authority (MERA) in September, is expected to somewhat limit upward price pressure on food products.

Improved maize availability ameliorates food security conditions

Although the 2014 Vulnerability Assessment Committee's (MVAC) report is yet to be released, the number of food insecure people is expected to decrease from last year's level of 1.46 million people, following the improved production and sharply reduced prices. However, households in localized areas of the north (Karonga) and south (Middle Shire) that experienced production declines, are expected to face constrained food access requiring some assistance.

Reference Date: 27-March-2014

FOOD SECURITY SNAPSHOT

- Favourable production prospects for the 2014 maize crop; harvest expected to exceed the previous year's above-average level if good weather persists
- Prices of maize remain high, but some decrease observed in February
- Approximately 1.9 million people are estimated to be food insecure, but conditions anticipated to improve with the start of the 2014 harvest in April

Above average maize harvest expected in 2014

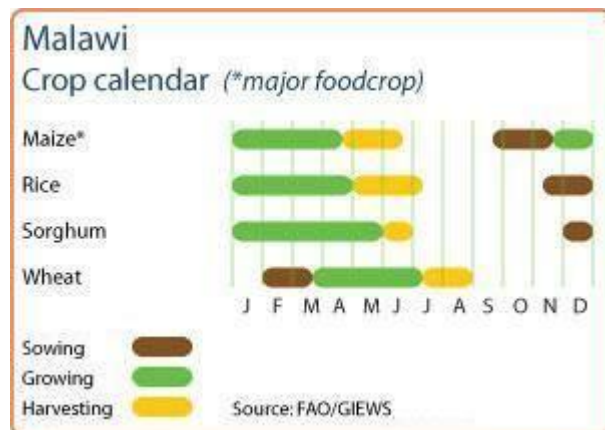
Harvesting of the 2014 cereal crops is expected to begin in April across most of the country. Despite a delayed start of seasonal rains in parts of the Southern Region, the overall 2014 production outlook is positive. Preliminary expectations point to a maize crop of between 3.7 and 3.9 million tonnes, if favourable weather persists until the end of the harvest period in May/June. If this level is achieved, the 2014 output will surpass 2013's above average harvest and the short-term average. However, far northern areas of the country, as well as some southern districts experienced dry-spells in March, resulting in crop wilting. This is expected to restrict yields and dampen production in the affected areas, though the impact at the national level may be limited.

Maize prices persist at high levels, but some declines recorded in February

Following sharp rises at the beginning of the year, the national average maize price decreased in February; however, increases were also recorded in some markets but at more subdued rate. The distribution of subsidised maize through the Agricultural Development and Marketing Corporation (ADMARC), which is retailed at MWK 80 per kg, nearly half the national average, and expectations of a good harvest in 2014 contributed to curbing significant increases. Prices however, still remain above their levels of 2013, with the national average price about 16 percent higher than its year earlier level. Higher fuel prices, coupled with localized production declines in 2013, as well as the effects of a depreciated currency, contributed to pushing prices up to their current high levels.

Food security conditions deteriorated, but improvements expected from April

Updated results from the 2013 Vulnerability Assessment Committee's (MVAC) evaluation in November indicated deterioration in national food security conditions. Approximately 1.9 million persons were assessed to be food insecure, up 27 percent from the figure released earlier in July, until the end of March. The largest numbers of food insecure persons are located in the districts of Mzimba (Northern Region) and Mangochi (Southern Region). The revised figures were based on a continuing increase in the price of food (as well as the generally high cost of living), as approximately 54 percent of a household's income is allocated to food purchases. Food security conditions are anticipated to improve in the coming months, with the start of the 2014 harvest from April.



Malawi Cereal production

| | 2008-2012 average | 2012 | 2013 estimate | change 2013/2012 |
|--------------|-------------------|--------------|---------------|------------------|
| | 000 tonnes | | | percent |
| Maize | 3 475 | 3 624 | 3 640 | 0 |
| Rice (paddy) | 117 | 111 | 125 | 13 |
| Sorghum | 63 | 66 | 86 | 30 |
| Others | 32 | 36 | 41 | 14 |
| Total | 3 687 | 3 837 | 3 892 | 1 |

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



Reference Date: 10-February-2014

FOOD SECURITY SNAPSHOT

- A near average cereal harvest expected in 2014
- Prices of maize at record levels at the start of 2014
- Approximately 1.9 million people are estimated to be food insecure, due to poor harvests and persistent high food prices

Overall satisfactory crop conditions in 2014

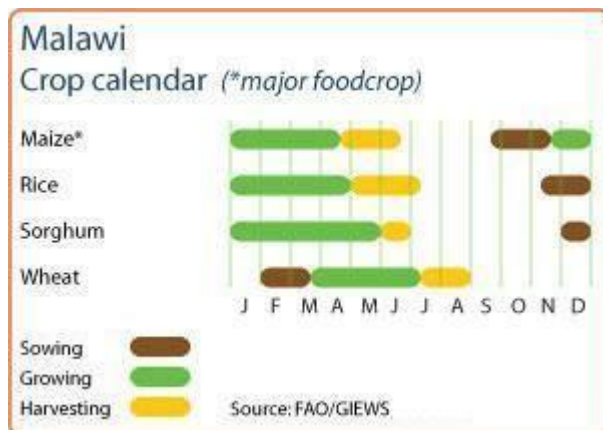
Harvesting of the 2014 cereal crops is expected to begin in April across most of the country. Despite a delayed start of seasonal rains in parts of the Southern Region, generally beneficial rains have been received across the country and crop conditions are reported to be satisfactory. Although planting estimates are not yet available for the 2014 crop, expectations of a near average national maize harvest are foreseen. However, an outbreak of armyworms in some southern districts may result in localised production losses. According to latest reports, approximately 2 500 hectares of crops were affected, which represents less than 1 percent of the area under cultivation at the national level. In response to the infestation, the government has carried out spraying of fields to prevent further spreading and limit crop damage. In addition, seeds and fertiliser were distributed to enable affected households to replant crops. Red locusts were also sighted in the southern area around Lake Chilwa and may cause damage to crops in the area.

As in previous years, the government continued to subsidise fertilisers, as well as other inputs, providing basal and top dressing at a fixed price of MWK 500 per 50 kg to approximately 1.5 million farmers. In addition to promoting traditional crops, such as maize, the government targeted increased investment in irrigation and legume production, with an aim to diversify the agricultural output and lessen the reliance of rain-fed production. Some distribution delays were experienced and this could negatively impact yields if fertilisers were not applied in a timely manner.

Maize prices reach record highs

Maize prices continued to increase strongly at the start of 2013, notably in northern and central districts, where month-on-month gains of up to 50 percent were observed. Demand from southern deficit districts contributed to the strong price increases. However, in several markets, mainly in the Southern Region, prices declined moderately, benefiting from the sale of subsidized maize by the Agricultural Development and Marketing Corporation (ADMARC). ADMARC is releasing approximately 15 tonnes of maize per market each week, retailing at MWK 80 per kg, about 45 percent lower than the national average. The sale of subsidised maize is rationed to 10 kg per person. Informal imports from Zambia have helped to steady local supplies in some border districts, limiting further price gains in these markets.

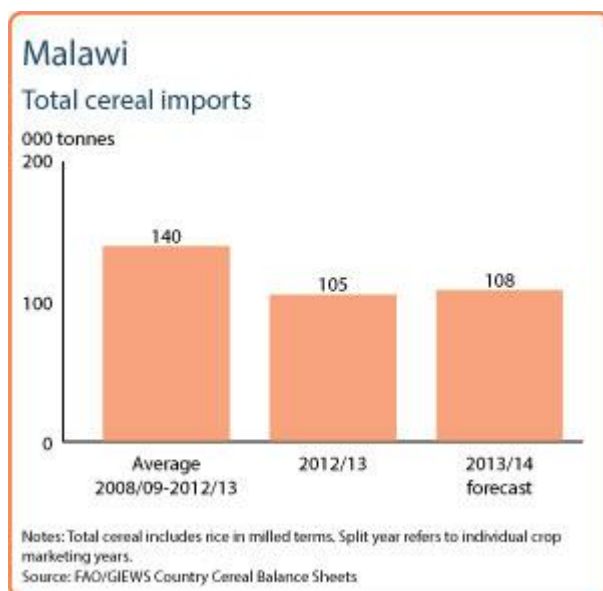
Overall, prices remained well above their levels of the previous year and have reached record highs. The national average price, at MWK 147 per kg in January 2014, is nearly three times greater than in corresponding period in 2013. The depreciating national currency (kwacha), an increase in fuel prices at the end of 2013, which were



Malawi
Cereal production

| | 2008-2012 average | 2012 | 2013 estimate | change 2013/2012 |
|--------------|-------------------|--------------|---------------|------------------|
| | 000 tonnes | | | percent |
| Maize | 3 475 | 3 624 | 3 640 | 0 |
| Rice (paddy) | 117 | 111 | 125 | 13 |
| Sorghum | 63 | 66 | 86 | 30 |
| Others | 32 | 36 | 41 | 14 |
| Total | 3 687 | 3 837 | 3 892 | 1 |

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

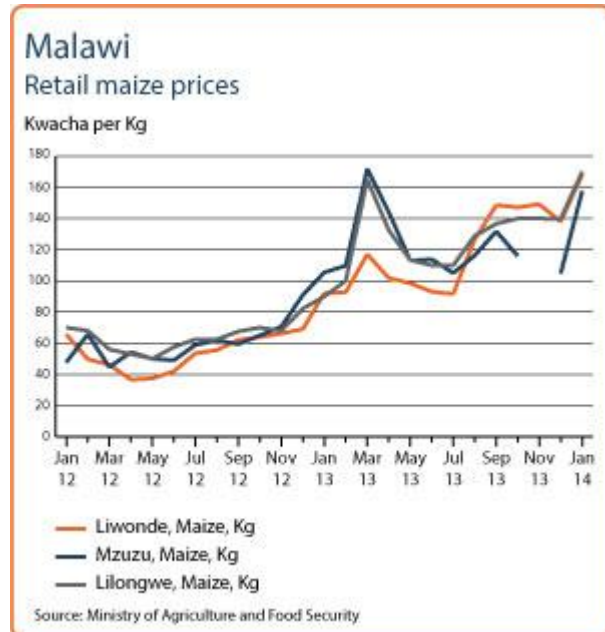


subsequently revised upwards again in February 2014, coupled with localized production declines in 2013 contributed to the high price levels.

Food security conditions deteriorate

Updated results of the Vulnerability Assessment Committee's (MVAC) 2013 evaluation in November, point to a deterioration in national food security conditions. Currently, approximately 1.9 million persons were assessed to be food insecure, up 27 percent from the figure released earlier in July. The largest numbers of food insecure persons are located in the districts of Mzimba (Northern Region) and Mangochi (Southern Region). The recently revised figures were based on a continuing increase in the price of food (as well as the generally high cost of living) and localised production shortfalls recorded in 2013. MVAC's assessment assumes that the price of maize will not exceed MWK 200 per kg. Currently, prices have not reached that level, with the highest price recorded in Chiradzulu district at MWK 181 per kg in January.

In addition, labour opportunities are reported to be reduced this year, following lower crop sales from the 2013 season which combined with the high maize prices resulted in a significant contraction in purchasing power. Approximately 54 percent of a household's income is allocated to food purchases. Given the current high food prices and the large proportion of a households' budget allocated to food purchases, close monitoring of the food security situation is warranted.



Reference Date: 15-November-2013

FOOD SECURITY SNAPSHOT

- Planting of the 2014 cereal crop is underway
- Maize production in 2013 is estimated at a similar level to the 2012 harvest
- Generally firm maize prices in October 2013 following strong gains in the preceding months
- Approximately 1.46 million people are estimated to be food insecure, due to poor harvests and persistent high food prices

Favourable conditions foreseen for the 2013/14 cropping season

Land preparation and planting of the 2014 cereal crops commenced in October, under generally sporadic rainfall. However, preliminary rainfall forecasts indicate an increased probability of normal to above normal precipitation between November 2013 and March 2014, with a high possibility of heavy rains during the latter months. As in previous years, the government will continue to subsidise fertilisers, as well as other inputs, providing basal and top dressing at a fixed price of MWK 500 per 50 kg. In addition to promoting traditional crops, such as maize, the government has targeted increased investment in irrigation and legume production, with an aim to diversify the agricultural output and lessen the reliance of rain-fed production.

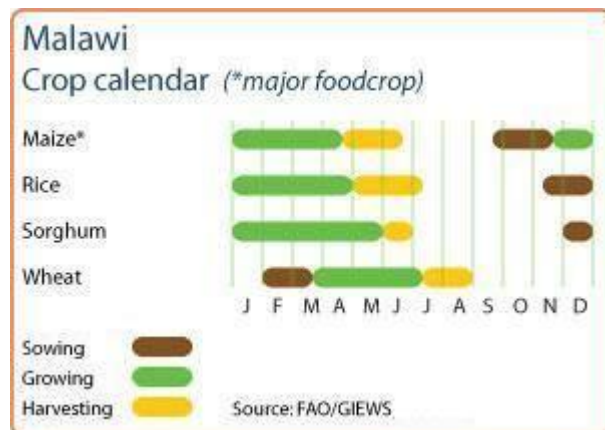
Maize production estimated at above average levels in 2013

In 2013, the primary staple maize crop is estimated at approximately 3.6 million tonnes, similar to the previous year but about 5 percent above the average for the previous five years. Production in southern districts recovered from the drought affected harvests of 2012. However, in the more productive northern and central districts, maize outputs declined slightly from the good levels of 2012, partly off-setting the gains registered in the south. Production of sorghum and millet increased by 30 and 15 percent respectively over the previous season, while the wheat and rice crop remain relatively unchanged. Overall, cereal production in 2013 is estimated at approximately 3.9 million tonnes.

Based on the latest crop estimates, the country has sufficient domestic maize supplies from the 2013 harvest to cover national food requirements, estimated at approximately 2.7 million tonnes in 2013/14 marketing year (April/March).

Tobacco production increases, but cotton declines

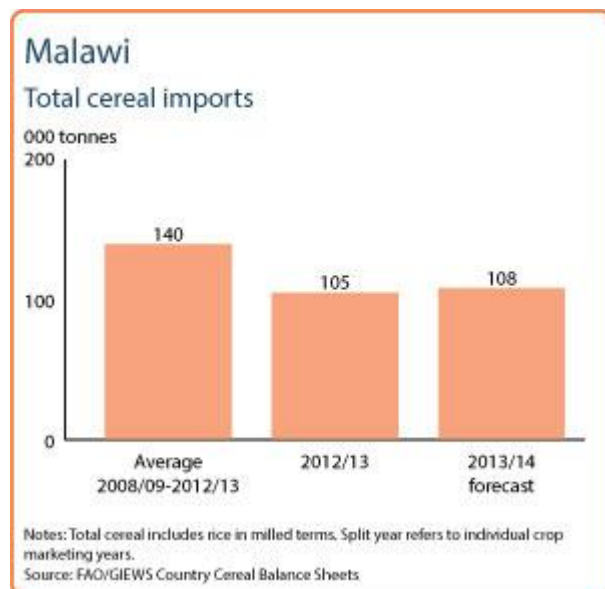
An expansion in tobacco plantings contributed to a larger crop in 2013, estimated at approximately 133 000 tonnes, nearly double the level of last year. Cotton production on the other hand, estimated at about 158 000 tonnes, is about 35 percent lower than in 2012, following a significant contraction in plantings, partly on account of lower prices in 2012.



Malawi Cereal production

| | 2008-2012 average | 2012 | 2013 estimate | change 2013/2012 |
|--------------|-------------------|--------------|---------------|------------------|
| | 000 tonnes | | percent | |
| Maize | 3 475 | 3 624 | 3 640 | 0 |
| Rice (paddy) | 117 | 111 | 125 | 13 |
| Sorghum | 63 | 66 | 86 | 30 |
| Others | 32 | 36 | 41 | 14 |
| Total | 3 687 | 3 837 | 3 892 | 1 |

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



Prices of maize stabilised in October following steep rises in preceding months

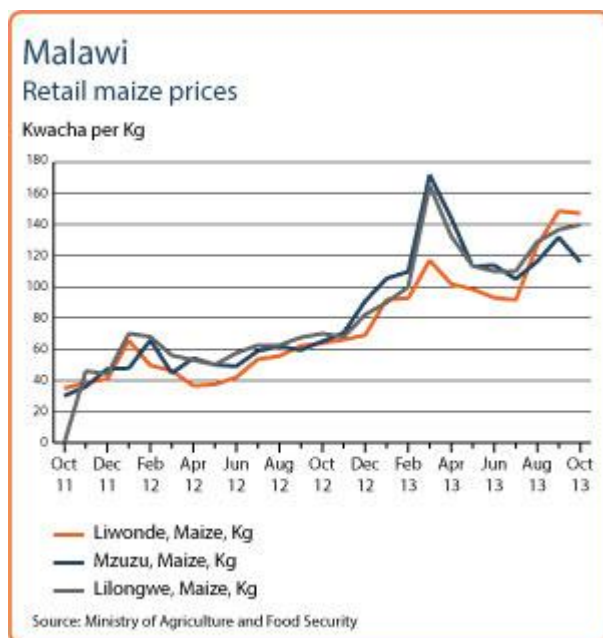
In Malawi, maize prices remained generally stable in October marking a departure from the large increases recorded in previous months. New supplies from the irrigated winter crops, currently being harvested, helped stabilize prices, particularly in southern and central markets, where most of the irrigated winter crops are grown. However, prices still remained twice their last year levels, owing to the higher costs of transportation and production, as well as localized production declines in 2013. The Agricultural Development and Marketing Corporation (ADMARC), the government's parastatal, is selling maize at a subsidised price of MWK 80 (about USD 0.2) per kg, but is restricting the quantity sold to 10 kgs per person per day.

The inflation rate, despite a marginal rise in the food component, continued its downward trajectory in September which began in March 2013, after significant increases in the preceding year following the liberalisation of the exchange rate regime.

Food security conditions still critical, but improved compared to 2012/13

Results from the 2013 Vulnerability Assessment Committee's (MVAC) evaluation, released in July, indicate a 26 percent decrease in the number of food insecure to 1.46 million persons in the 2013/14 marketing year. The largest numbers of food insecure persons are located in Kasungu (Central Region) and Mzimba (Northern Region) districts, reflecting production declines in 2013. The continuing high price of both food and non-food commodities has also contributed to stressing food security conditions, with many households' experiencing a severe contraction in their purchasing power; approximately 54 percent of income is normally allocated to food purchases.

The MVAC results are based on the assumption that the maize price will not exceed an average level of MWK 125 per kg during 2013/14 marketing year. Given the current increasing prices and the large proportion of a households' budget allocated to food purchases, which reached 75 percent in some cases, close monitoring of the market and prices are warranted.



Reference Date: 17-September-2013

FOOD SECURITY SNAPSHOT

- Maize production in 2013 is estimated at a similar level to the 2012 harvest
- Maize prices climbed sharply in August 2013 following a drop during the main harvest period (May-June)
- Approximately 1.46 million people are estimated to be food insecure, due to poor harvests and persistent high food prices

Favourable conditions foreseen for the 2013/14 cropping season

Planting of cereal crop in the 2013/14 cropping season (September-June) is about to begin. Preliminary rainfall forecasts indicate an increased probability of normal to above normal precipitation between October 2013 and March 2014, with a high possibility of heavy rains during the latter months. In addition, the Government plans to continue subsidising fertilisers, as well as other inputs, providing basal and top dressing at a fixed price of MWK 500 per 50 kg. In addition to promoting traditional crops, such as maize, the Government has targeted increased investment in irrigation and legume production, with an aim to diversify the agricultural output.

Maize production remains stable in 2013

In 2013, the primary staple maize crop is estimated at approximately 3.6 million tonnes, similar to the previous year. Production in southern districts recovered from the drought affected harvests of 2012. However, in the more productive northern and central districts, maize outputs declined slightly from the good levels of 2012, off-setting the gains registered in the south. Production of sorghum and millet increased by 14 percent over the previous season, while the wheat and rice crop remain relatively unchanged. Production estimates may vary slightly with the release of the third round crop assessment, which will provide more accurate estimates for the irrigated maize crop. Overall, cereal production in 2013 is estimated at 3.87 million tonnes.

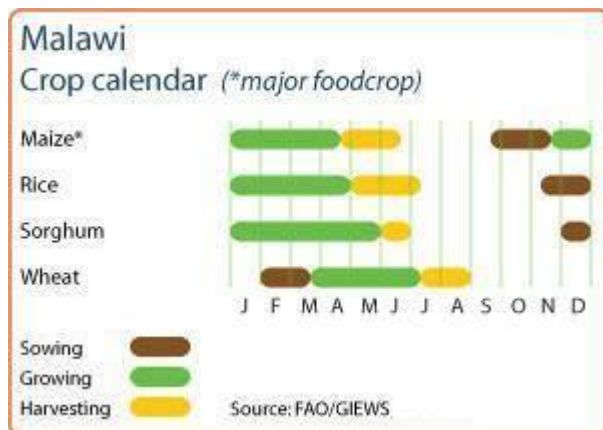
Based on the latest crop estimates, the country has sufficient domestic maize supplies from the 2013 harvest to cover national food requirements, estimated at approximately 2.7 million tonnes in 2013/14 marketing year (April/March).

Tobacco production increases, but cotton declines

An expansion in tobacco plantings contributed to a larger crop in 2013, estimated at approximately 120 000 tonnes, about 64 percent up on last year. Cotton production on the other hand, estimated at about 163 000 tonnes, is about 33 percent lower than the 2012 output, following a significant contraction in plantings, partly on account of lower prices recorded in 2012.

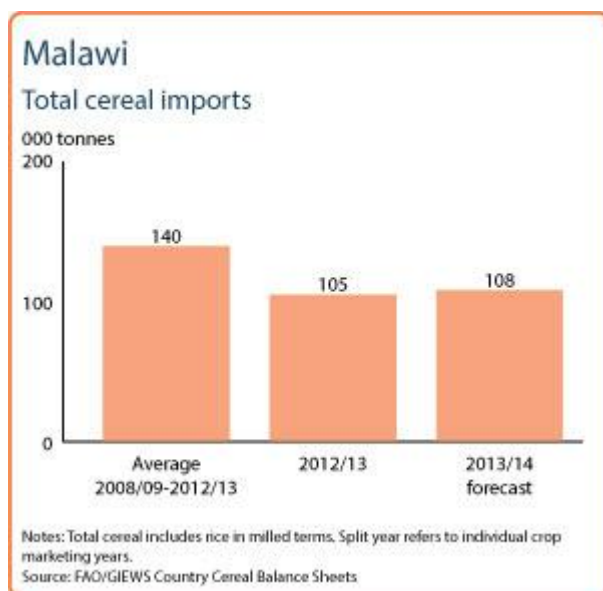
Prices of maize increase steeply after seasonal declines

The national average price of maize continued to strengthen in August



| | 2008-2012 average | 2012 | 2013 estimate | change 2013/2012 |
|--------------|-------------------|--------------|---------------|------------------|
| | 000 tonnes | | | percent |
| Maize | 3,475 | 3,624 | 3,640 | 0 |
| Rice (paddy) | 117 | 111 | 110 | -1 |
| Sorghum | 63 | 66 | 73 | 11 |
| Others | 32 | 36 | 44 | 22 |
| Total | 3,687 | 3,837 | 3,867 | 1 |

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



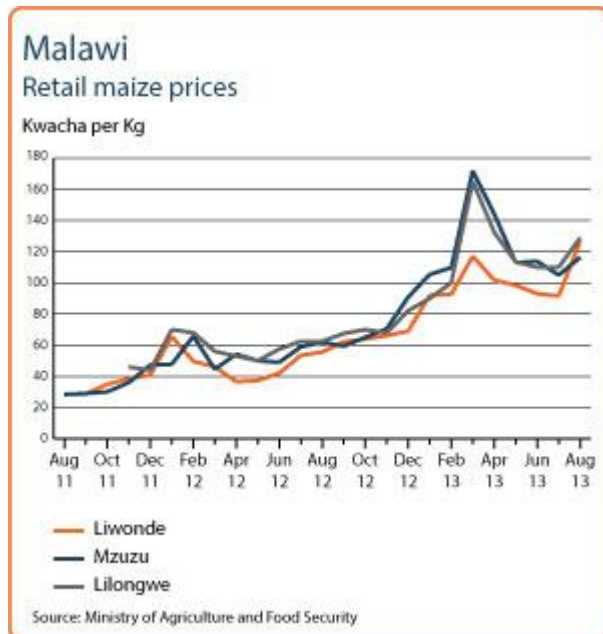
at a rate quicker than the previous years. At MWK 114 per kg, the price is more than twice the level of a year earlier, though below the peak recorded in March, with higher transportation and production costs contributing to price inflation. In southern districts, the production rebound in 2013 has tempered price increases over the last two months compared to other parts of the country. The highest quotations, close to MWK 200 per kg, were recorded in Rumpfi (North) and Kasiya (Central) markets, with lower harvests in these areas supporting the price levels.

The inflation rate, however, continued its downward trajectory in August (began in March 2013), after significant increases in the preceding year following the liberalisation of the exchange rate regime. However, at 23 percent, the annual inflation rate remains at a high level. Increased sales of tobacco in 2013 and consequently larger inflows of US dollar, has supported a more stable exchange rate since May, contributing to the decreasing inflation rate.

Food security conditions still critical, but improved compared to 2012/13

Results from the 2013 Vulnerability Assessment Committee's (MVAC) evaluation, released in July, indicate a 26 percent decrease in the number of food insecure to 1.46 million persons in the 2013/14 marketing year. The largest numbers of food insecure persons are located in Kasungu (Central Region) and Mzimba (Northern Region) districts, reflecting production declines in 2013. The continuing high price of both food and non-food commodities has also contributed to stressing food security conditions, with many households' experiencing a severe contraction in their purchasing power; approximately 54 percent of income is normally allocated to food purchases.

The MVAC results are based on the assumption that the average maize price will not exceed MWK 125 per kg during 2013/14 marketing year. Given the current increasing prices and significant allocation of a households' budget to food purchases, which reached 75 percent in some cases, close monitoring of the market and prices are warranted.



Reference Date: 13-May-2013

FOOD SECURITY SNAPSHOT

- Maize production in 2013 is forecast at an above average level, similar to last year
- Maize prices continued to climb sharply in March 2013, reaching alarming levels
- Nearly 2 million people were estimated to be food insecure. However, conditions are expected to improve with the arrival of the 2013 harvest

Maize production forecast at an above average level in 2013

Harvesting of the main 2012/13 season's cereal crop is underway, with generally dry conditions facilitating harvesting activities; however, heavy rains in April delayed harvesting activities in northern parts. During the main cropping season (October-June) rains were generally satisfactory, particularly in the Southern Region, which suffered from a prolonged dry period in the previous season. The Government's second round crop assessment in February, indicated a possible production increase, particularly in the drought prone southern areas, despite a small reduction in the area planted to maize. Preliminary estimates point to a crop of about 3.7 million tonnes, slightly up on 2012's level. However, a short dry spell in March in some northern and central areas, which followed the second round assessment, could affect final estimates. Production of other cereal crops - rice, sorghum and millet – is also expected to increase over the previous year's output, while wheat production, although very minor, is estimated to fall in 2013.

An expansion in tobacco plantings contributed to a larger crop in 2013, estimated at approximately 120 000 tonnes, about 64 percent up on last year. Cotton production on the other hand, another important cash crop, is anticipated to decrease by 33 percent in 2013 to 163 000 tonnes, following a significant contraction in plantings, partly on account of lower prices recorded in 2012.

Stock build-up expected in 2013/14

Based on the second round crop assessment results, the country will have more than sufficient domestic supplies from the 2013 harvest to cover national food requirements, estimated at approximately 2.7 million tonnes for the 2013/14 marketing year (April/March). A sizeable stock level is expected to be retained during 2013/14, even allowing for feed and industrial use requirements.

However, in 2013 approximately 30 000 tonnes of maize from the strategic reserves were lost due to heavy rains and inadequate storage facilities. Consequently the government authorised the importation of 35 000 tonnes from Zambia.

Maize prices continued to climb steeply

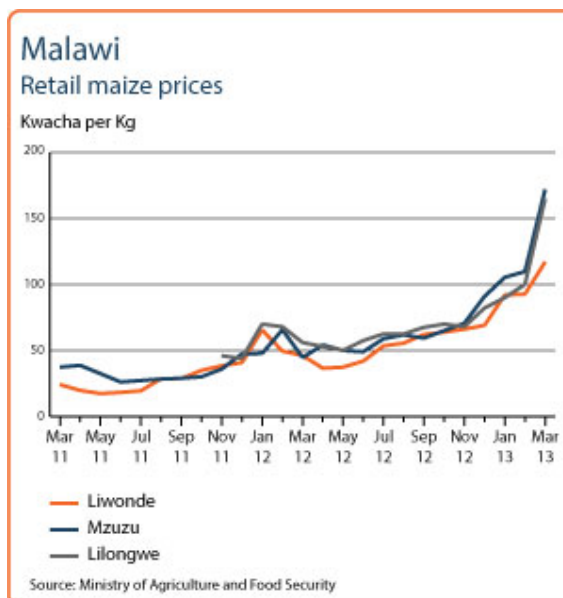
Maize prices continued their strong month-on-month increases in March 2013, unlike previous years when prices tend to fall with the start of the early harvest. The national average price reached



Malawi Cereal production

| | 2008-2012 average | 2012 | 2013 forecast | change 2013/2012 |
|--------------|-------------------|--------------|---------------|------------------|
| | 000 tonnes | | | percent |
| Maize | 3,474 | 3,619 | 3,680 | 2 |
| Sorghum | 63 | 66 | 73 | 11 |
| Others | 32 | 36 | 44 | 22 |
| Total | 3,686 | 3,832 | 3,907 | 2 |

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



MWK 135 per kg, nearly three times the level of the previous year, well above the annual inflation rate. The devaluation of the currency (kwacha) in May 2012 triggered the strong price rises, following increases in cost of transportation and other imported goods. In addition, localized production shortfalls in southern regions and increased exports created tighter domestic supplies adding to the upward price pressure.

The inflation rate declined for the first time in March for almost two years, partly on account of a decrease in the food sub-component of CPI. The decrease reflects better availability and lower prices of some food items such as sorghum, millet and beans, with the start of the 2013 main season's harvest. However, the annual inflation rate still remains at a high of 36.4 percent.

Food security conditions expected to improve with the 2013 harvest

Results from the last Vulnerability Assessment Committee's (MVAC) evaluation in October 2012 indicated that almost 2 million people (about 13 percent of the population) were food insecure. High price of both food and non-food commodities was the main driving factor, with many households' experiencing a severe contraction in their purchasing power; approximately 54 percent of income is normally allocated to food purchases.

The Southern region was the most affected area, with all but three of the 16 affected districts located there. In response, the Government and partner institutions launched response plans with the government releasing 25 000 tonnes of maize from the strategic reserve. In addition, a further 47 500 tonnes of maize was planned to be distributed until March 2013.

Improvements in food security conditions are expected in the next few months, as new supplies from current harvests improve food availability. In addition, the government announced in May that the minimum wage will be increased, which is expected to help stabilise and improve households' purchasing power. Results from the 2013 Malawi Vulnerability Assessment (MVAC), expected in July, would provide more details on the number of food insecure and required interventions.

Reference Date: 17-December-2012

FOOD SECURITY SNAPSHOT

- Mixed rains recorded at the start of the 2012/13 cropping season
- Cereal output in 2011/12 is estimated at 3.83 million tonnes, 7 percent below the previous season
- Significantly high maize prices in the Southern Region are negatively affecting access to food, especially for vulnerable people
- Nearly 2 million people are currently estimated to be food insecure, with southern parts of the country facing serious conditions

Below normal rains observed in Central and Southern Regions

The bulk of planting activities for the 2012/13 cropping season (October-June) is expected to be complete in the next couple of weeks. Rainfall since October has generally been below normal over large parts of the country, with slightly higher amounts observed in the Northern Region. In December, however, heavy rains have fallen in the Southern Region, partly alleviating early seasonal water deficits. Based on the 2012/13 seasonal weather forecast there is a higher chance of normal rains through to March 2013.

Farmers will continue to benefit from the Farm Input Subsidy Programme (FISP), accessing subsidized inputs, with the number of beneficiaries estimated to reach 1.5 million. Additional support to the agricultural sector will be provided through the response plans launched by the government in November 2012, to tackle the impact of the poor harvest earlier in the year.

Above average aggregate cereal crop gathered in 2012, but harvest was reduced in the South

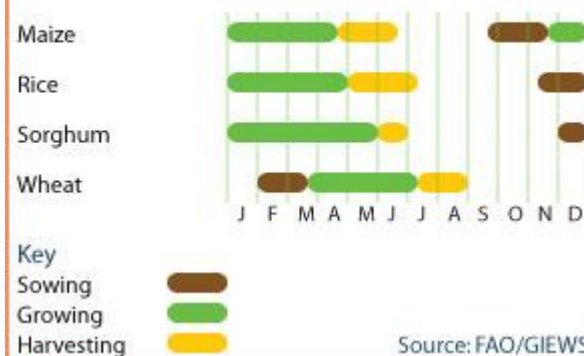
Production estimates from the government's second round assessment put the 2012 maize harvest at approximately 3.6 million tonnes, some 180 000 tonnes above the five-year average but down 7 percent from the record 2011 crop.

The Central region contributed the largest share to the national output, just under two thirds, while the drier Southern region contributed about 25 percent. Millet production rose marginally in 2012, on account of improved yields, while a decrease in plantings for sorghum resulted in a smaller harvest, down about 10 percent compared to 2011. Overall, the cereal output for 2012 is estimated at 3.83 million tonnes, 7 percent below the previous season's record crop.

Maize prices reach alarming levels in the Southern Region

National average prices of maize have continued to rise and in November reached a high of MWK 63 per kg, nearly double the level of the previous year for the same month. In the Southern Region, production short-falls and high transportation costs have fuelled prices

Crop calendar Malawi



Malawi

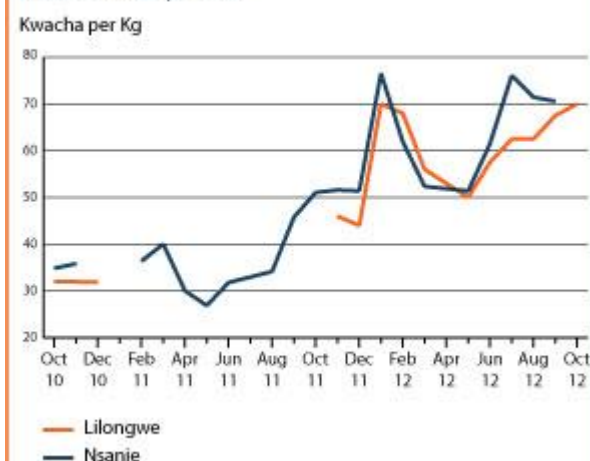
Cereal production

| | 2007-2011 average | 2011 | 2012 estimate | change 2012/2011 |
|--------------|-------------------|--------------|---------------|------------------|
| | 000 tonnes | | percent | |
| Maize | 3,440 | 3,895 | 3,619 | -7 |
| Rice (paddy) | 117 | 123 | 111 | -10 |
| Sorghum | 62 | 73 | 66 | -10 |
| Others | 32 | 35 | 36 | 3 |
| Total | 3,651 | 4,126 | 3,832 | -7 |

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

Malawi

Retail maize prices



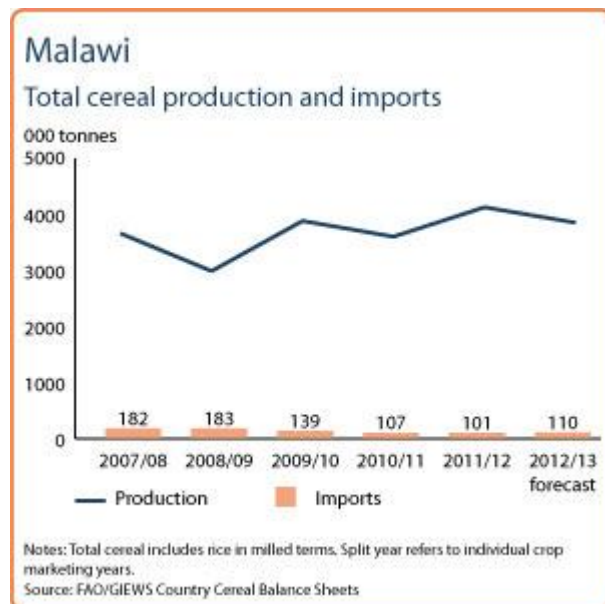
to alarming levels. In Nsanje for example, located near the border with Mozambique, prices hit a high of MWK 81 per kg. In addition, tight supplies in central Mozambique, usually a source of maize for southern districts, as well as the depreciated currency (inflating import prices) has limited informal imports, further compounding the low supply situation. Furthermore, some markets in the north are experiencing similarly high prices, such as Karonga where maize was trading at MWK 86 per kg in November.

The persistent high maize prices prompted the government to maintain the maize export ban. While 15 000 tonnes of maize will be distributed to the southern districts and sold at a subsidised price of MWK 60 per kg through the Agricultural Development and Marketing Corporation (ADMARC), in efforts to buffer supplies and stabilise prices.

Increase in the number of food insecure people

An updated analysis from the Vulnerability Assessment Committee (MVAC) in October 2012 reveals an increase in the number of food insecure people from 1.63 million to almost 2 million people (about 13 percent of the population). Persistent high prices of both food and non-food commodities, unfavourable production prospects for off-season crops (harvested from October), and limited wage labour opportunities have combined to cause the sharp deterioration in food security conditions. The Southern region is the most affected area, with all but three of the 16 affected districts located in the south.

In response to the prevailing conditions, government and partner institutions have launched two response plans to tackle the immediate needs and build the resilience of the affected population. Accordingly, the government has released 25 000 tonnes of maize from the strategic reserves in order to meet the immediate food deficits. In addition, a further 47 500 tonnes of maize will be distributed in the next few months, until March 2013. WFP's programme is targeting over 1.8 million people combining cash transfers with in-kind food assistance.



Reference Date: 06-November-2012

FOOD SECURITY SNAPSHOT

- Generally normal rainfall conditions forecast for the current 2012/13 cropping season (October-June)
- Cereal output in 2011/12, harvested from last May, is estimated at 3.83 million tonnes, 7 percent below the previous season
- Persistently high maize prices and inflation rates negatively impact on the food security of vulnerable people
- Nearly 2 million people are currently estimated to be food insecure, with southern parts of the country facing serious conditions

Rainfall forecasts indicate generally average conditions for the 2012/13 cropping season

Land preparation and planting for the 2012/13 cropping season (October-June) is underway across the country. Rainfall in October has generally been below normal over large parts of the country, with slightly higher amounts observed in the Northern region. However, the 2012/13 seasonal weather forecast predicts a higher chance of normal precipitation over the course of the season. Farmers will continue to benefit from the Farm Input Subsidy Programme (FISP), accessing subsidized inputs, with the number of beneficiaries estimated to reach 1.5 million.

Above average aggregate cereal crop gathered in 2012, but harvest was reduced in the South

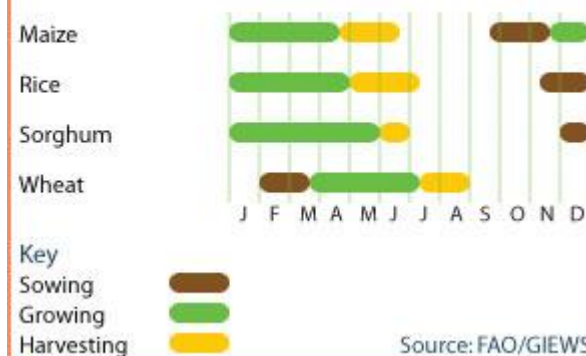
Production estimates from the government's second round assessment put the 2012 maize harvest at approximately 3.6 million tonnes, some 180 000 tonnes above the five-year average but down 7 percent from the record 2011 crop.

The Central region contributed the largest share to the national output, just under two thirds, while the drier Southern region contributed about 25 percent. Millet production rose marginally in 2012, on account of improved yields, while a decrease in plantings for sorghum resulted in a smaller harvest, down about 10 percent compared to 2011. Overall, the cereal output for 2012 is estimated at 3.83 million tonnes, 7 percent below the previous season's record crop.

High maize prices and inflation rates constrain food access

The national inflation rate continued to rise in September 2012 reaching 28 percent, compared to 8 percent a year earlier. National average prices of maize, the main food staple, hit a high of MWK 57.30 per kg in October 2012, nearly double the level of the previous year. Prices are particularly elevated in the Southern region, reaching up to MWK 73 in some markets. These high prices are attributed to reduced localised harvests that necessitated increased trade from the more productive Central region. The currency devaluation and the consequent hike in fuel prices resulted in higher transportation costs that pushed up prices. In addition, lower than normal maize supplies from Mozambique (traditionally a supplier of maize for the Southern

Crop calendar Malawi



Malawi Cereal production

| | 2007-2011 average | 2011 | 2012 estimate | change 2012/2011 |
|--------------|-------------------|--------------|---------------|------------------|
| | 000 tonnes | | percent | |
| Maize | 3,440 | 3,895 | 3,619 | -7 |
| Rice (paddy) | 117 | 123 | 111 | -10 |
| Sorghum | 62 | 73 | 66 | -10 |
| Others | 32 | 35 | 36 | 3 |
| Total | 3,651 | 4,126 | 3,832 | -7 |

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

Malawi Retail maize prices



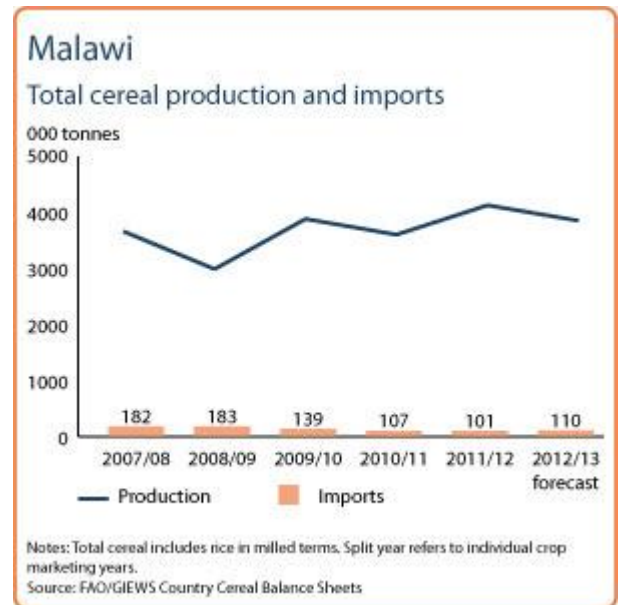
region) have contributed to the tighter supplies.

Historical seasonal trends indicate that maize prices are expected to continue to climb until early next year, when new supplies from the 2013 harvest begin to supplement market stocks. The persistent high maize prices prompted the government to maintain the maize export ban.

Increase in the number of food insecure people

An updated analysis from the Vulnerability Assessment Committee (MVAC) in October 2012, reveals an increase in the number of food insecure people from 1.63 million to almost 2 million people (about 14 percent of the population). Persistent high prices of both food and non-food commodities, unfavourable production prospects for off-season crops (harvested from October), and limited wage labour opportunities have combined to cause the sharp deterioration in food security conditions. The Southern region is the most affected area, with all but three of the 16 affected districts located in the south. Furthermore, if nominal maize prices rise above MVAC's projected maximum price of MWK 100 per kg, this could worsen present conditions.

Relief operations are being implemented, and under WFP's Protracted Relief and Recovery Operation an estimated 1.6 million people are being targeted for food assistance. In-kind food assistance will be provided to 1.5 million, while the remaining beneficiaries are expected to receive cash based assistance for an estimated four months (October-January 2013).



Reference Date: 05-July-2012

FOOD SECURITY SNAPSHOT

- Cereal production estimates indicate a 7 percent decrease in 2011/12 compared to last year
- National average maize prices remain at high levels
- Localised production shortfalls and high prices negatively impact on food security conditions

Cereal production decreases in 2012, but remains above average

Harvesting of the 2011/12 cereal crops began in April and is almost complete. Despite an erratic start to the rainy season (October-March), which resulted in replanting in some locations, rainfall distribution generally improved in Central and Northern regions, benefiting crop development, while some southern districts continued to suffer below normal rains.

Production estimates from the Government's second round assessment in April indicate a maize crop of approximately 3.6 million tonnes, down 7 percent from 2011's record output, but still some 180 000 tonnes above the five-year average. The Central region contributed the largest share to the national output, just under two thirds, while the drier Southern region contributed about 25 percent. Millet production is expected to rise marginally in 2012, on account of improved yields, while a decrease in plantings for sorghum is anticipated to result in a smaller harvest, down about 10 percent compared to 2011. Overall, the cereal output for 2012 is currently estimated at some 3.85 million tonnes, 7 percent below the previous season's record crop. However, results from the third round crop assessment are expected in July and will provide the final estimates for 2012 harvest. Weather conditions were generally stable between April (second round assessment) and June, and therefore, no significant variation in crop production estimates are anticipated.

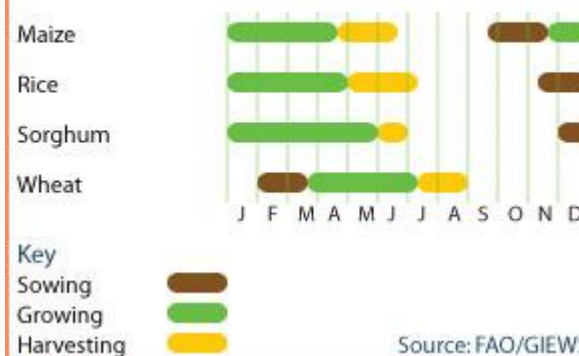
Maize prices remain at high levels, despite seasonable decline

In January, the national average maize price hit a high of MWK 56 per kg, about 83 percent above the same month in 2011, attributed partly to erratic fuel supplies and high transportation costs. Since this peak, price levels declined to MWK 40 per kg in May 2012 (seasonal low), following the arrival of new supplies from the 2012 harvest, but began to rise again in June. Maize prices in June remained above the previous five-year average in all monitored markets. The Government's increase in the farm-gate price of maize for the 2012/13 marketing year (May/April) to MWK 35 per kg (up from MWK 25), is an additional factor that may have contributed to the high prices, although also maintaining higher incomes for farmers. Similarly, prices of other food commodities (including rice and groundnuts), are also higher than the previous year.

Temporary freeze of maize exports

Maize production in 2012 is more than sufficient to satisfy national food consumption for the 2012/13 marketing year (April/May), estimated at

Crop calendar Malawi

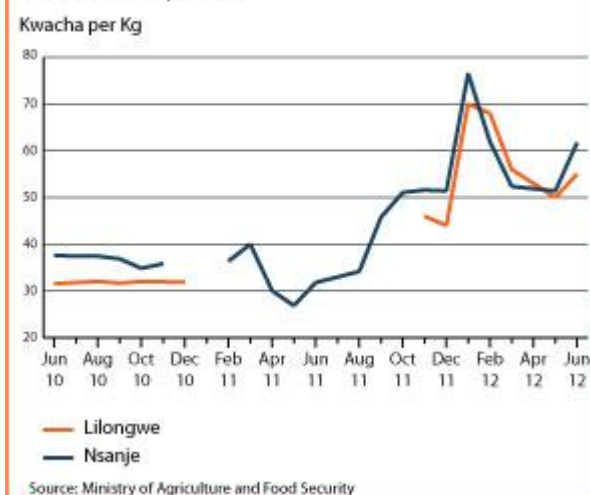


Malawi Cereal production

| | 2007-2011 average | 2011 | 2012 forecast | change 2012/2011 |
|--------------|-------------------|--------------|---------------|------------------|
| | 000 tonnes | | percent | |
| Maize | 3 440 | 3 895 | 3 619 | -7 |
| Rice (paddy) | 117 | 123 | 130 | 6 |
| Sorghum | 62 | 73 | 66 | -10 |
| Others | 32 | 35 | 36 | 3 |
| Total | 3 651 | 4 126 | 3 851 | -7 |

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

Malawi Retail maize prices

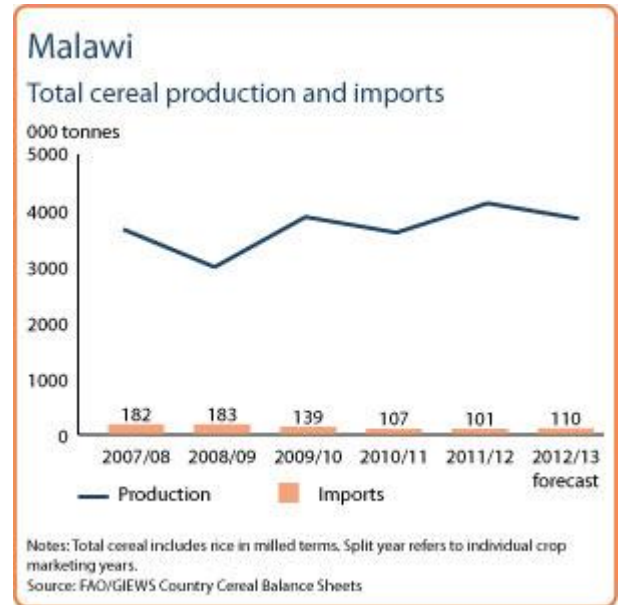


approximately 2.4 million tonnes. The lower output, however, resulted in a smaller national surplus, while exports have been temporarily frozen, following concerns over the rising prices in late 2011. Import requirements for 2012/13, mainly wheat and rice, are forecast at about 110 000 tonnes, similar to the previous year. Although the country is self-sufficient in maize, informal imports are expected to continue to trickle into the southern deficit areas from the surplus zones in Mozambique, given the close proximity. Approximately 30 000 tonnes of maize were imported from Mozambique between April 2011 and March 2012, based on FEWSNET monitoring systems.

Localised poor production and high maize prices aggravate food insecurity

The results from the 2012 Vulnerability Assessment Committee (MVAC) in June indicate a sharp deterioration in food security conditions compared to the previous year. The prolonged dry spell in early 2012 resulted in localized production shortfalls in 15 districts, mainly in the Southern region, constraining food supplies from own production. Some of these areas have experienced poor harvests in the past two seasons, deteriorating households' coping capacity. In addition, the higher maize prices, which are expected to rise in the next months, are likely to erode households' purchasing power, particularly impacting poor urban households, who are predominantly net-food purchaser and have limited or no agricultural production capacity; food purchases account for about 55 percent of households' total expenditure. Of this, 20 percent (national average) is allocated to cereal purchases.

Overall, an estimated 1.63 million people, approximately 11 percent of the population, are estimated to be food insecure. This compares with the 2 percent estimated last year. The affected populations are expected to face food deficits ranging between 3 to 8 months during the 2012/13 marketing year.



Reference Date: 07-May-2012

FOOD SECURITY SNAPSHOT

- Recent estimates indicate a 7 percent decrease in cereal production in 2011/12 compared to last year
- Monthly maize prices fall following a rapid rise in 2011 and early 2012
- High prices negatively impact on food security conditions in southern districts

Cereal production decreases in 2012, but remains above average

Harvesting of the 2011/12 season's cereal crops began in April, and is expected to continue until July. Despite an erratic start to the rainy season (October-March), which resulted in replanting in some locations, rainfall distribution improved in Central and Northern regions, benefiting crop development, while some southern districts continued to suffer below normal rains.

Recently released production estimates, based on a Government assessment in April, indicate a maize crop of approximately 3.6 million tonnes, down from 2011's record output, although still some 180 000 tonnes above the five-year average. The Central region contributed the largest share to the national output, just under two thirds, while the dry prone Southern region contributed about 25 percent. Millet production is expected to rise marginally in 2012, on account of improved yields, while a decrease in plantings for sorghum is anticipated to result in a smaller harvest, down about 10 percent compared to 2011. Overall, the cereal output for 2012 is estimated at some 3.85 million tonnes, 7 percent below the previous season's record crop.

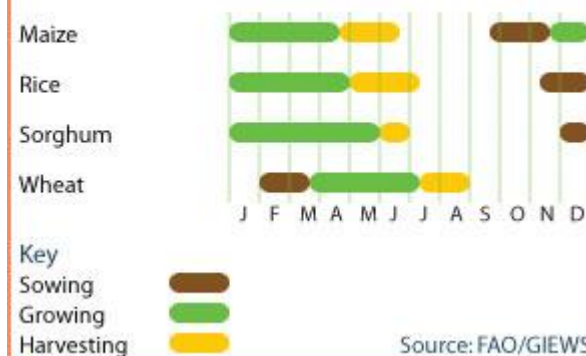
Maize prices decrease, following sharp rise in early 2012

Following a rapid increase since November 2011, particularly in the deficit producing areas of the south, maize prices declined in March 2012. The national average maize price hit a high of MWK 51 per kg in February, about 65 percent higher than in the same month in 2011, partly attributed to higher fuel prices. Similarly, national inflation has risen over the same period, reflecting the higher maize and fuel costs. In March 2012 the price of maize had dropped slightly from the previous month's level, to MWK 49 per kg and is expected to decrease further or stabilise as new supplies from the 2012 harvest supplement household and market stocks.

Temporary freeze of maize exports

Maize production in 2012 is more than sufficient to satisfy national food consumption for the 2012/13 marketing year (April/May), estimated at approximately 2.4 million tonnes. The lower output, however, is likely to result in smaller exportable surpluses, although under current regulations export have been temporarily frozen, following concerns over the rising prices in late 2011. Import requirements for 2012/13, mainly wheat and rice, are estimated to remain at similar levels to the previous year, forecast at about 110 000 tonnes. Though the country is self-sufficient in maize, informal imports are expected to continue to

Crop calendar Malawi

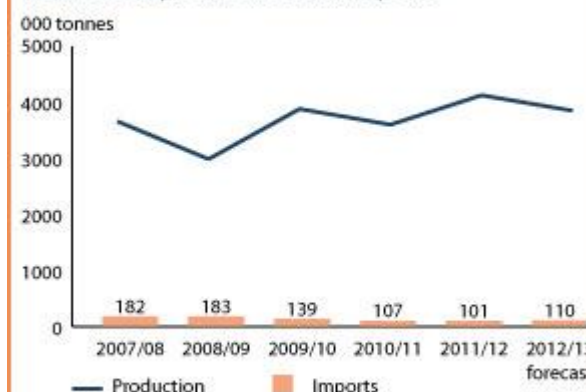


Malawi Cereal production

| | 2007-2011 average | 2011 | 2012 forecast | change 2012/2011 |
|--------------|-------------------|--------------|---------------|------------------|
| | 000 tonnes | | percent | |
| Maize | 3 440 | 3 895 | 3 619 | -7 |
| Rice (paddy) | 117 | 123 | 130 | 6 |
| Sorghum | 62 | 73 | 66 | -10 |
| Others | 32 | 35 | 36 | 3 |
| Total | 3 651 | 4 126 | 3 851 | -7 |

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

Malawi Total cereal production and imports

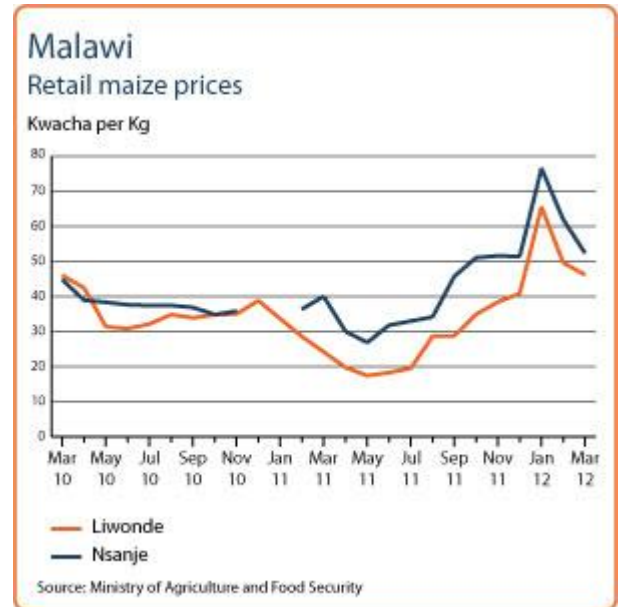


Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

trickle into the southern deficit producing region, given its close proximity to the productive zones in Mozambique. Approximately 30 000 tonnes of maize were imported from Mozambique between April 2011 and March 2012, based on FEWSNET monitoring systems.

Higher maize prices affect vulnerable groups

Updated figures from the Malawi Vulnerability Assessment Committee (MVAC) in January show a deterioration in food security conditions in southern districts, following the rapid escalation of maize prices to levels above those previously forecast by MVAC. An additional 71 000 persons were assessed to be unable to satisfy their food consumption requirements given a reduction in their purchasing power. Overall, about 273 000 people are estimated to be food insecure. The affected households are located in the southern districts of Nsanje, Chikhwawa, Balaka, Blantyre, Chiradzulu, Mwanza, Neno, Phalombe, Zomba and Ntcheu that suffered localized production shortfalls as a result of irregular rains and a dry spell in 2010/11. Unfavourable localised weather conditions during the 2011/12 cropping season are expected to result in a successive poor harvest in some of these areas, placing further stress on the affected communities' livelihoods. The 2012 MVAC assessment, expected to be released soon, will provide a more comprehensive picture on current and projected food security conditions.



Reference Date: 02-March-2012

FOOD SECURITY SNAPSHOT

- Uneven distribution of rains result in mixed prospects for 2011/12 maize crop
- Monthly maize prices increased rapidly at the end of 2011, but dipped in February 2012
- Exports of maize suspended temporarily
- High prices negatively impact on food security conditions in southern districts

Irregular rains in southern parts result in flooding and dry spells

The rainfall situation in central and southern parts of the country during the first half of the rainy season (October-December 2011) was rather poor, while normal to above normal rains were recorded in the northern region. The passing of several consecutive tropical cyclones in the Mozambique Channel in early 2012 brought sustained heavy rains to the south, causing flooding in the districts of Chikwawa and Nsanje. Localised damage to crops and livestock were reported. A dry spell in February in parts of the south and centre coincided with the flowering stage of the maize crop and may affect yields. In most other parts of the country, favourable rains benefited crop growth. The preliminary forecast for the maize crop in 2012 is put at about 3.3 million tonnes, about 4 percent above the previous five-year average, but below the record harvest of 2011.

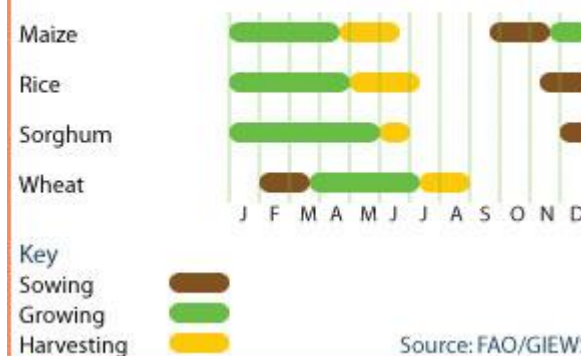
Sharp increase in maize prices in southern markets

During the last quarter of 2011 and through to the beginning of 2012, maize prices increased rapidly, particularly in the deficit producing areas of the south. In Nsanje (southern region), prices increased by nearly 50 percent to MWK 77 per kg in January 2012 compared to October 2011. However, in February 2012 some decline in prices was observed in most markets, though they still remain well above prices of the previous year. The national average price of maize at MWK 53 per kg in February 2012 is 70 percent higher than in February 2011. Tighter maize supplies, partly due to larger than normal maize exports to neighbouring countries, together with increasing transportation costs following fuel shortages were the main reasons behind the increase in prices.

Temporary freeze of maize exports

During 2011 there was a marked increase in cross border trade to Mozambique and Tanzania. Between April and November over 53 000 tonnes crossed the border to Mozambique, compared to about 3 000 tonnes over the same period in 2010. Similarly, 16 000 tonnes, more than double the quantity in the previous year, were exported to Tanzania. Formal exports have also increased, supported by the good harvest in 2011. However, amid concerns over rising prices and tighter supplies and to ensure adequate supplies throughout the country, the government suspended maize exports at the end of 2011.

Crop calendar Malawi

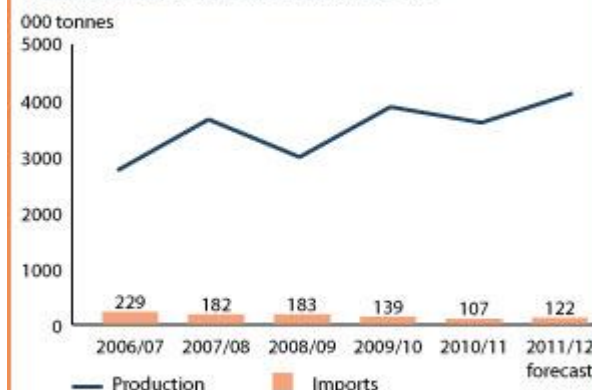


Malawi Cereal production

| | 2006-2010 average | 2010 | 2011 estimate | change 2011/2010 |
|--------------|-------------------|--------------|---------------|------------------|
| | 000 tonnes | | percent | |
| Maize | 3 176 | 3 419 | 3 895 | 14 |
| Rice (paddy) | 111 | 103 | 118 | 15 |
| Sorghum | 59 | 54 | 73 | 35 |
| Others | 31 | 26 | 35 | 35 |
| Total | 3 377 | 3 602 | 4 121 | 14 |

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

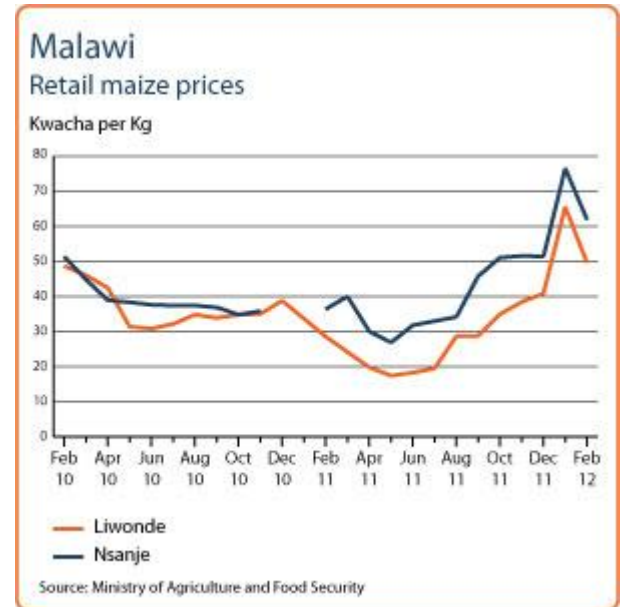
Malawi Total cereal production and imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Rising maize prices affect vulnerable groups

Updated figures from the Malawi Vulnerability Assessment Committee (MVAC) in January show a deterioration in food security conditions in southern districts, following the rapid escalation of maize prices to levels above those previously forecast by MVAC. An additional 71 000 persons are assessed to be unable to satisfy their food consumption requirements given a reduction in their purchasing power; in total approximately 273 000 are food insecure. The affected households are located in the southern districts of Nsanje, Chikhwawa, Balaka, Blantyre, Chiradzulu, Mwanza, Neno, Phalombe, Zomba and Ntcheu that suffered localized production shortfalls as a result of irregular rains and a dry spell in 2010/11. Furthermore, the recent floods in the Shire river basin have affected just over 6 000 persons.



Reference Date: 10-January-2012

FOOD SECURITY SNAPSHOT

- Uneven distribution of rains characterise the beginning of the 2011/12 agricultural season
- Monthly maize prices rise rapidly at the end of 2011
- Exports of maize temporarily suspended
- High prices aggravate food insecurity conditions, while food distributions begins in southern districts

Poor rains recorded in central and southern region during 2011/12 agricultural season

Planting of the 2011/12 agricultural season crops is virtually complete. The rainfall situation in central and southern parts of the country during the first half of the rainy season (October-December 2011) was rather poor while normal to above normal rains have been recorded in the northern region. As a result water deficits have been observed in central and southern areas, causing localised crop wilting. In addition, high temperatures have aggravated the situation negatively impacting early crop development. The prevailing conditions also supported an outbreak of army worms in several areas in the south and centre. However, forecasts indicate an increased probability of above normal rains between January and March, which could help to alleviate the early moisture deficits.

Sharp increase in maize prices in southern markets

During the last quarter of 2011, maize prices have increased rapidly, particularly in the deficit producing areas of the south. In Chiradzulu (southern region), prices increased by nearly 60 percent to MWK 55 per kg in December 2011 compared to the beginning of October 2011. The national average price was nearly one third above last year's level at MWK 39 per kg. Tighter maize supplies, due, in part, to larger than normal maize exports to neighbouring countries, and increasing transportation costs as a result of the fuel shortages were fuelling the price increase. Furthermore, ADMARC, the government parastatal, has raised its selling price for maize by 50 percent to MWK 60 per kg.

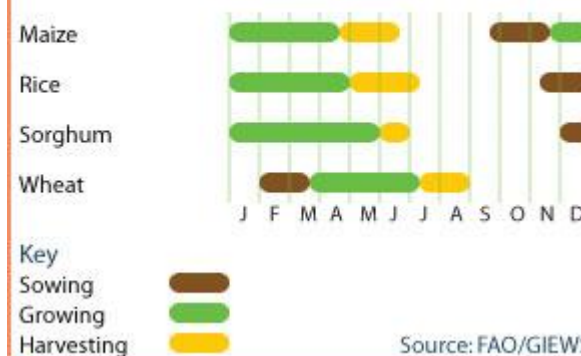
Temporary freeze of maize exports

During 2011 there has been a marked increase in cross border trade to Mozambique and Tanzania. Between April and November over 53 000 tonnes crossed the border to Mozambique, compared to about 3 000 tonnes over the same period in 2010. Similarly more than double the quantity was exported to Tanzania. Formal exports have also increased, supported by the good harvest in 2011. However, amid concerns over rising prices and tighter supplies, the government suspended maize exports at the end of 2011 in an effort to ensure adequate supplies throughout the country, particularly in southern markets.

Food assistance starts in southern districts

In November 2011, the government and humanitarian agencies agreed to facilitate the distribution of just under 5 000 tonnes of maize to the

Crop calendar Malawi

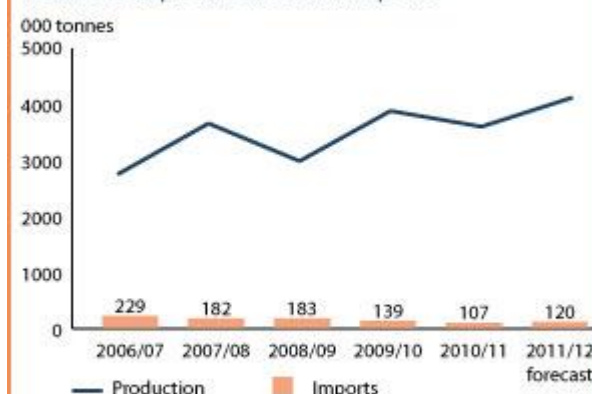


Malawi Cereal production

| | 2006-2010 average | 2010 | 2011 estimate | change 2011/2010 |
|--------------|-------------------|--------------|---------------|------------------|
| | 000 tonnes | | percent | |
| Maize | 3 176 | 3 419 | 3 895 | 14 |
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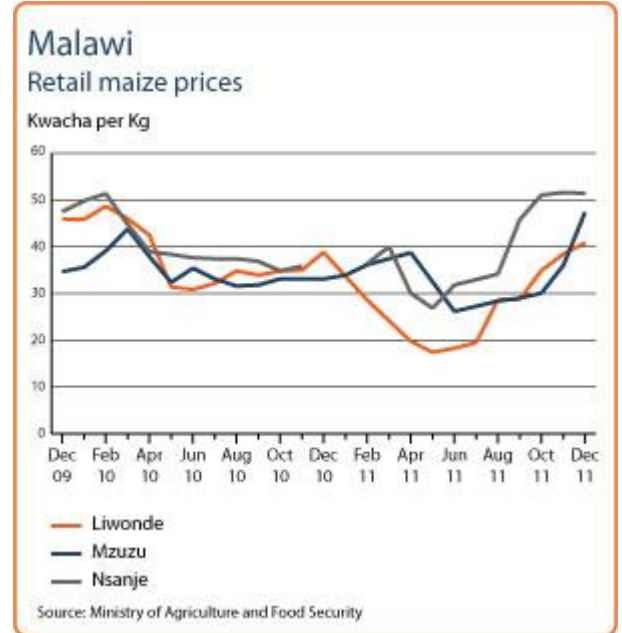
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Malawi Total cereal production and imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

201 854 food insecure persons who were identified in the 2011 Malawi Vulnerability Assessment Committee (MVAC) report. The affected households are located in areas of the southern districts of Nsanje, Chikhwawa, Balaka, Blantyre, Chiradzulu, Mwanza, Neno, Phalombe, Zomba and Ntcheu that suffered localized production shortfalls as a result of irregular rains and a dry spell in 2010/11. However, given that one of the central parameters of the vulnerability assessment, namely the price of maize, has now altered a review of the MVAC results began in October 2011. Updated results are expected in the next month. Further factors that have aggravated current food insecurity conditions are the limited employment opportunities during the lean period compared to previous years, as well as the ban on livestock sales earlier in 2011 in Chikhwawa, due to an outbreak of foot and mouth disease. The ban however, has now been lifted, providing households with increased income opportunities.



Reference Date: 13-October-2011

FOOD SECURITY SNAPSHOT

- Planting for the 2011/12 cereal crops started in October
- Record maize crop was harvested in 2011
- Relatively low maize prices and increased exports observed in 2011
- Generally favourable food security conditions, but southern districts affected by dry spell remain a concern

The 2011/12 cropping season has just begun

Land preparation for the 2011/12 cereal cropping season has started and the preliminary rainfall forecast indicates that northern regions are expected to receive normal to above normal rains throughout the rainy season (October-March). By contrast central and southern areas are expected to receive normal to below normal rains between October and December 2011, but increased rainfall is forecast from January to March 2012. The government's Farm Input Subsidy Programme (FISP) will continue this season and initial plans indicate that the number of beneficiaries will be reduced to 1.4 million farmers, down from 1.6 million last year.

In an initiative to further the gains from the good performance of the cotton sector, and partly following the downturn in the tobacco sector, the government has allocated MWK 1.6 billion to provide cotton farmers with fertilizer and seeds, through a loan facility that is repayable at harvest.

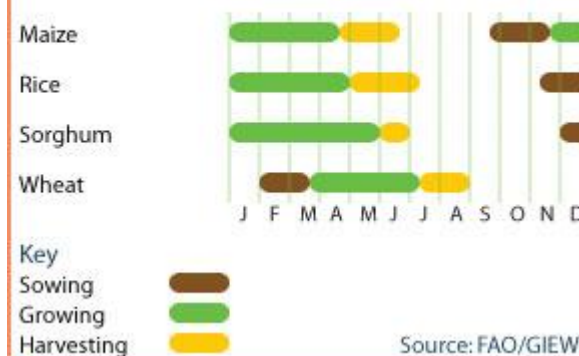
Record maize crop gathered last year

Aggregate cereal production in 2010/11 is estimated at just over 4.1 million tonnes, 14 percent larger than the previous year. The third round crop assessment, carried out in June, points to a record maize crop at just under 3.9 million tonnes. The largest geographic contribution to national maize production came from the central regions, accounting for nearly 60 percent of domestic production in 2011. Southern regions constituted a much smaller percentage (several regions in the south produced between 70-90 percent of their previous five-year average) primarily due to the dry spell in February 2011.

National average maize prices remain generally low, but prices in the south rise

Maize prices continue to remain stable in most markets of the country, benefitting from adequate supplies. As of September 2011, the national average maize price, at MWK 30 per kg, was lower than the previous three years for the same month. However, prices have reached high levels of MWK 40 per kg in the northern town of Chitipa at the end of August, partly attributed to the high demand from neighbouring Tanzania, but decreased marginally in September. Similarly, higher prices prevail in some southern regions due, in part, to the high transportation costs of moving maize from the more productive central regions. In Nsanje, prices of maize had risen above MWK 40 per kg during September.

Crop calendar Malawi

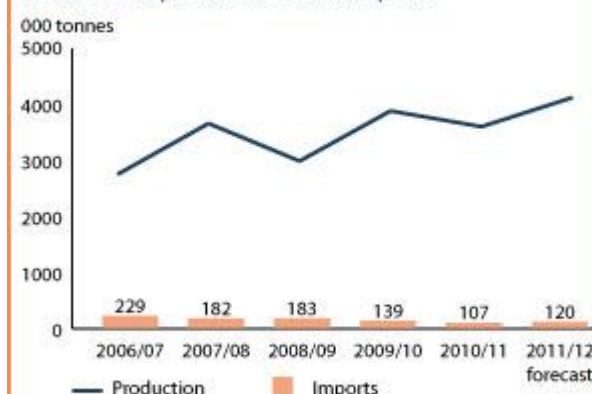


Malawi Cereal production

| | 2006-2010 average | 2010 | 2011 estimate | change 2011/2010 |
|--------------|-------------------|--------------|---------------|------------------|
| | 000 tonnes | | percent | |
| Maize | 3 176 | 3 419 | 3 895 | 14 |
| Rice (paddy) | 111 | 103 | 118 | 15 |
| Sorghum | 59 | 54 | 73 | 35 |
| Others | 31 | 26 | 35 | 35 |
| Total | 3 377 | 3 602 | 4 121 | 14 |

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

Malawi Total cereal production and imports

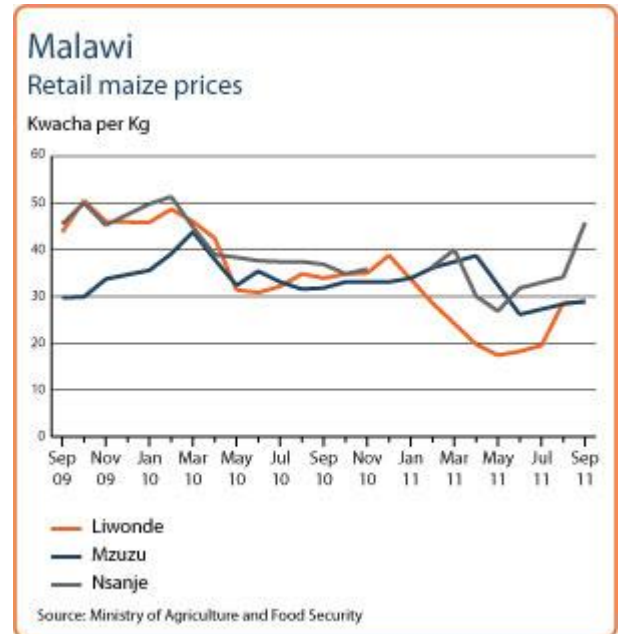


Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

During 2011 there has been a marked increase in cross border trade to Mozambique and Tanzania. Between April and August over 34 000 tonnes crossed the border to Mozambique, compared to about 1 500 tonnes over the same period in 2010 and similarly nearly double the quantity was exported to Tanzania relative to last year's level. Formal exports have also increased, supported by the good stocks and lower national prices, with the country earning just over MWK 7 billion from maize exports between January and June 2011. During this period maize was the fourth highest export earner.

Localized dry spell results in some crop losses

Despite generally satisfactory food security conditions in most areas of the country, the recent release of the Malawi Vulnerability Assessment Committee (MVAC) results in September indicate that an estimated 201 854 persons are food insecure, down from 508 089 reported in 2010/11 marketing year. The affected households are located in areas of the southern districts of Nsanje, Chikhwawa, Balaka, Blantyre, Chiradzulu, Mwanza, Neno, Phalombe, Zomba, and Ntcheu that suffered localized production shortfalls as a result of irregular rains and a dry spell. Production deficits in selected areas of these districts range from 16 to 35 percent. The estimated number of food insecure is based on the assumption that the comparatively low levels of cereal prices will stay at or below MWK 40 per kg; however, if prices begin to climb and persist above the MWK 40 mark, then revisions in the vulnerability assessment will be required.



Reference Date: 25-August-2011

FOOD SECURITY SNAPSHOT

- Record maize harvest in 2010/11.
- Prices of maize remain low in most markets, reflecting abundant domestic supplies
- Generally favourable food security conditions, but areas affected by floods and a dry spell remain a concern

Record maize crop estimated for the 2010/11 agricultural season

Aggregate cereal production in 2010/11 is estimated at just over 4.1 million tonnes, 14 percent larger than the previous year. The third round crop assessment, carried out in June points to a record maize crop at about 3.9 million tonnes. Generally favourable rainfall over most of the country and the Government's Farm Input Subsidy Programme (FISP) that benefited an estimated 1.6 million smallholder maize farmers, supported the production gains. The largest geographic contribution to national maize production came from the central regions, accounting for nearly 60 percent of domestic production in 2011. Southern regions constitute a much smaller percentage where several regions in the south produced between 70-90 percent of the previous 5-year average, primarily due to the dry spell in February.

An increase in the price of cotton induced farmers to expand plantings and estimates indicate a crop of over 52 000 tonnes, compared with nearly 30 000 tonnes in 2010. Further investment in the cotton industry is envisaged for the forthcoming 2011/12 agricultural campaign, with the government planning to distribute seed and fertilizers to farmers through a loan facility.

Bumper crop exerts downward pressure on maize prices

As of June 2011, maize prices were lower than last year, ranging from MWK 15 to MWK 37 per kg, compared to MWK 17 to MWK 48 in June 2010. Good stock levels and favourable production in most areas of the country resulted in the fall in prices. The national average price increased marginally in June, conforming to normal season patterns, to MWK 24 per kg.

ADMARC (Agricultural Development and Marketing Corporation), the Government's marketing agency, has been allocated MWK 1.2 billion from the 2011/12 national budget (compared to MWK 1.9 billion in 2010/11) for the procurement of maize grain. With a farm gate price set by the government at MWK 25 per kg, ADMARC is able to purchase nearly 50 000 tonnes of maize, to be stored in the Strategic Grain silos.

There has been a marked increase in informal trade between Malawi and Mozambique and in July 2011 alone, nearly 11 000 tonnes crossed the border to Mozambique compared to just above 200 tonnes in July 2010.

Crop calendar Malawi

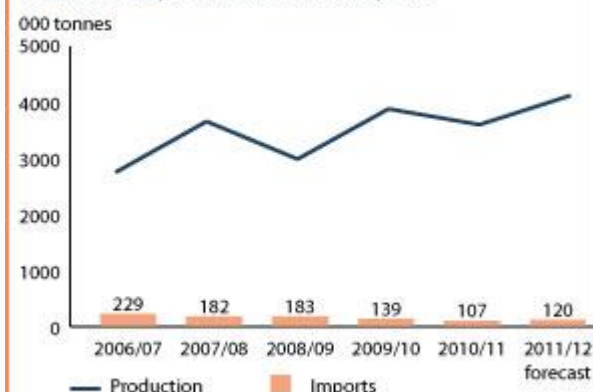


Malawi Cereal production

| | 2006-2010 average | 2010 | 2011 estimate | change 2011/2010 |
|--------------|-------------------|--------------|---------------|------------------|
| | 000 tonnes | | percent | |
| Maize | 3 176 | 3 419 | 3 895 | 14 |
| Rice (paddy) | 111 | 103 | 118 | 15 |
| Sorghum | 59 | 54 | 73 | 35 |
| Others | 87 | 78 | 106 | 36 |
| Total | 3 377 | 3 602 | 4 121 | 14 |

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

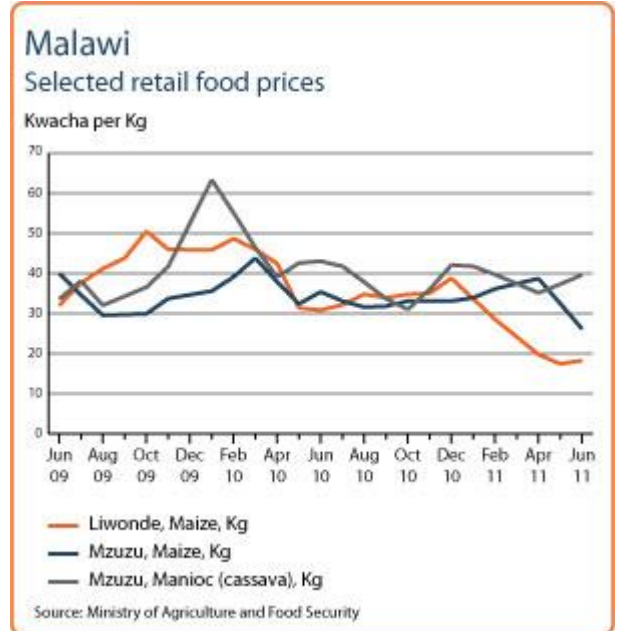
Malawi Total cereal production and imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Localised flooding and dry-spell result in some crop losses

The food security conditions remain generally satisfactory in most areas of the country. Localised production short-falls, as a result of climatic shocks (floods in Karaonga and a dry spell in southern regions) could negatively impact on households' ability to replenish food stocks from own production. However, the prevailing relatively low level of cereal prices is expected to help households' access food from markets. The finalisation of the 2011 Malawi Vulnerability Assessment Committee (MVAC) in August will provide further details on the level of food insecurity in the affected areas.



Reference Date: 25-May-2011

FOOD SECURITY SNAPSHOT

- Record maize crop harvested in 2011
- Prices of maize remain at low levels in most markets, reflecting abundant domestic supplies and good crop prospects
- Generally favourable food security conditions, but areas affected by floods and the dry spell remain a concern

Record maize crop estimated for the 2010/11 cropping season

Harvesting of the country's main food crop, maize, commenced in April. The recently released second round crop assessment, conducted by the government in March, estimates a record maize crop for the 2010/11 cropping season at about 3.85 million tonnes, 13 percent larger than the previous season. Generally favourable rainfall over most of the country and assistance to farmers through the Government's Farm Input Subsidy Programme (FISP) that benefited an estimated 1.6 million smallholder maize farmers, supported the production gains. However, some southern districts were affected by a dry spell in February, particularly the late planted crops in areas along the Shire River between Mangochi to Nsanje. These areas also experienced production short-falls during the last agricultural campaign.

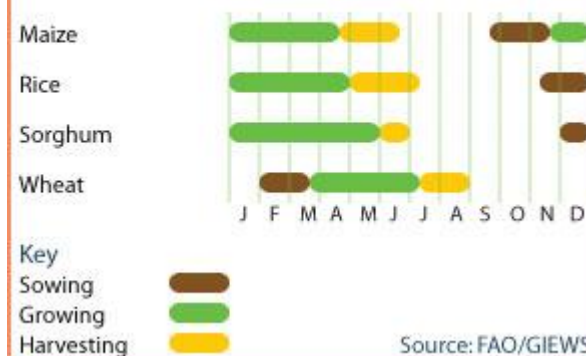
The Government announced the farm gate price for this season's crops, with prices for maize set at MWK 25 per kg, compared to MWK 35 for the previous year. Given the good production estimates for the 2011 harvest, the country is anticipated to retain a significant surplus in the current 2011/12 marketing year (April/March).

With regard to cash crops, an increase in the price of cotton induced farmers to expand plantings and this is expected to lead to a higher output in 2011. Estimates point to about 52 000 tonnes, compared with just under 30 000 tonnes in 2010.

Low and stable maize prices across the country

As a result of the bumper maize crop, which has enabled the country to maintain significant stocks, low and comparatively stable prices have been sustained throughout the 2010/11 marketing year. In April 2011, the monthly average national price fell to MWK 29 per kg, its lowest level in the past three years, following modest seasonable increases in the previous three months. However, maize prices varied markedly across the country, with the lowest price observed in Mkanda in the south at MWK 11 per kg. By contrast maize grain was traded at a higher MWK 44 per kg in the northern city of Chitipa which may be attributed to the increasing prices in southern Tanzania during the beginning of the year. ADMARC (Agricultural Development and Marketing Corporation), the Government's marketing agency, reduced its selling price for maize to MWK 40 per kg in February, down from MWK 60 earlier in the season, which is still above the prevailing national price average. This adjustment is expected to contribute in maintaining low maize prices.

Crop calendar Malawi

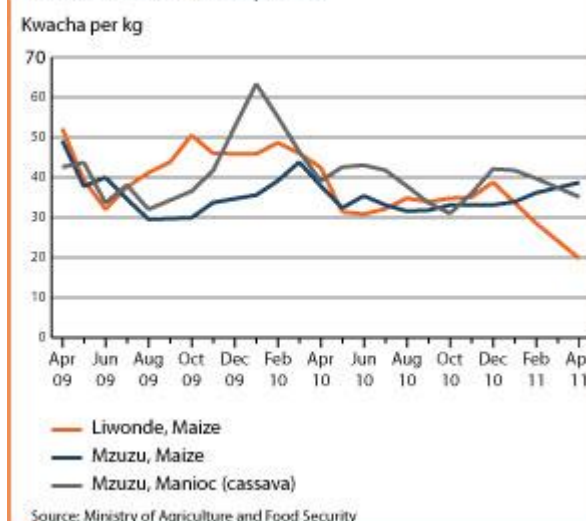


Malawi Cereal production

| | 2006-2010 average | 2010 | 2011 forecast | change 2011/2010 |
|--------------|-------------------|--------------|---------------|------------------|
| | 000 tonnes | | percent | |
| Maize | 3 176 | 3 419 | 3 847 | 13 |
| Rice (paddy) | 111 | 103 | 114 | 11 |
| Sorghum | 59 | 54 | 74 | 37 |
| Others | 87 | 78 | 113 | 45 |
| Total | 3 377 | 3 602 | 4 076 | 13 |

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

Malawi Selected retail food prices



Localised flooding and dry-spell result in some crop losses

Conditions remain generally favourable in most areas of the country, due to a combination of lower staple food prices and generally good supplies. The maize harvest will further augment market and household supplies, improving food security conditions. However, recent heavy rains and flooding in the northern district of Karaonga has affected just over 5 600 households and caused localized crop damage, particularly to the cassava crop. Food and shelter have been provided to the affected households in efforts to alleviate the situation. In addition, production losses due to insufficient rains in some southern districts could negatively impact on households' ability to replenish food stocks. The completion of the 2011 Malawi Vulnerability Assessment Committee (MVAC) report in the next month will provide further details on the level of food insecurity in the affected areas.

Reference Date: 12-April-2011

FOOD SECURITY SNAPSHOT

- A dry spell during February caused crop wilting in some southern districts
- However, production prospects still remain favourable, with early estimates pointing to a record maize harvest
- Prices of maize remain at low levels in most markets, reflecting abundant domestic supplies
- Generally favourable food security conditions, but some localized areas in the south remain vulnerable

Overall crop prospects are good, though a short-term dry spell affected maize crops in the south

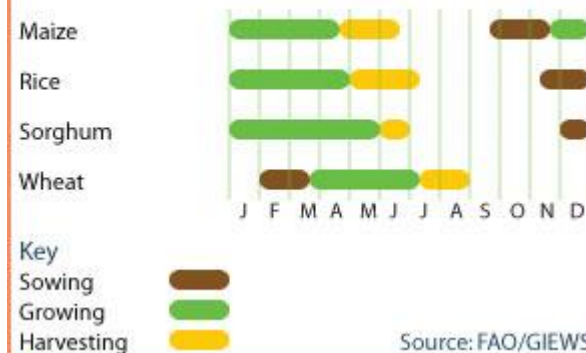
The Government's first round crop assessment, conducted during January, forecasts a record maize crop in the 2010/11 cropping season at about 3.9 million tonnes. Generally favourable rainfall over most of the country and input support through the Government's Farm Input Subsidy Programme (FISP), benefiting an estimated 1.6 million smallholder maize farmers, helped the optimistic outlook. However, a dry spell in February 2011 affected crops in some southern districts, with reports of crop wilting and premature drying, which could impact production levels, particularly for the late planted crop in areas along the Shire River from Mangochi to Nsanje. These areas also experienced production short-falls during the last agricultural campaign. The affect of the dry spell could impact production levels, with the results from second round crop assessment scheduled to be released in April. The Government has recently announced the farm gate price for next season's crops, with prices for maize set at MWK 25 per kg, compared to MWK 35 for the previous year. Given the preliminary production estimates for 2011 harvest, the country is anticipated to retain a large surplus in the 2011/12 marketing year (April/March), with the maize harvest scheduled to commence from April.

With regard to cash crops, an increase in the price of cotton induced farmers to expand plantings and this is expected to lead to a higher output in 2011. Preliminary estimates point to about 55 000 tonnes, compared with just under 30 000 tonnes in 2010.

Low and stable maize prices across the country

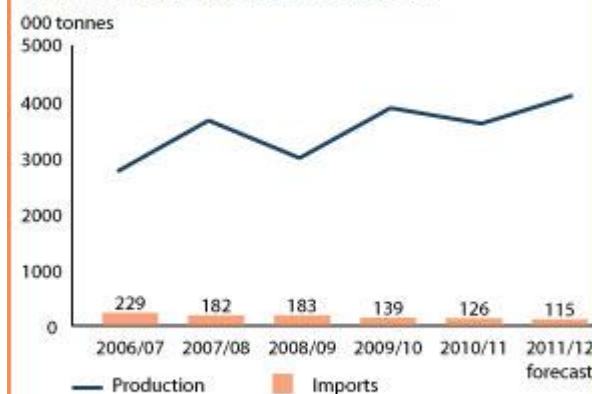
As a result of abundant national maize supplies, which have enabled the country to maintain significant stocks, low and comparatively stable prices have been sustained throughout the current marketing year. As of February 2011, the monthly average national price was MWK 31 per kg, compared with MWK 46 one year earlier. Prices have registered some increases in recent months, following seasonal patterns as households' increase market purchases. In the northern market of Mzuzu, maize was traded at MWK 36 per kg, about 8 percent lower than at the same month in 2010. Similarly, in the southern market of Liwonde, the monthly price remained low at MWK 29 per kg, about 40 percent below last year's level, having fallen marginally between January and February. ADMARC (Agricultural Development and Marketing Corporation), the Government's marketing agency, reduced its selling price for maize to MWK 40 per kg in February, down from

Crop calendar Malawi



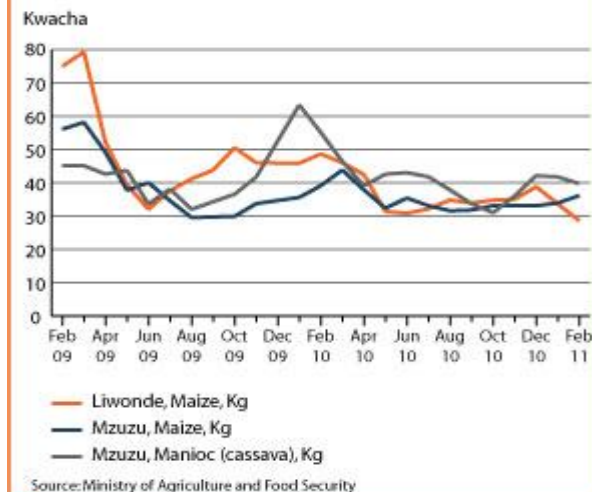
Malawi

Total cereal production and imports



Malawi

Selected retail food prices



MWK 60 earlier in the season, which is still above the prevailing national average as of February. This adjustment is expected to contribute in maintaining low maize prices. Furthermore, the sale of old maize stock during 2011, which was retained by the National Food Reserve Agency (NFRA) since 2005, will help to further boost market supplies.

Improved food security situation in the south

Conditions remain generally favourable in most areas of the country, due to a combination of lower staple food prices and generally good supplies. The beginning of the maize harvest will further augment market and household supplies, improving food security conditions. However, localized areas in some southern districts remain food insecure, following production shortfalls experienced last season. Recent heavy rains and minor flooding has also affected just over 5 000 households and caused localized crop damage, mostly in central areas. According to the Malawi Vulnerability Assessment Committee (MVAC) report issued in November 2010, an estimated 508 088 persons require food assistance. Currently, food aid distributions are targeting 74 724 people in Chikhwawa and 44 589 people in Nsanje, which will continue through to April.

Reference Date: 22-March-2011

FOOD SECURITY SNAPSHOT

- A dry spell during February caused crop wilting in some southern districts
- However, production prospects still remain favourable, with early estimates pointing to a record maize harvest
- Prices of maize remain at low levels in most markets, reflecting abundant domestic supplies
- Generally favourable food security conditions, but some localized areas in the south remain vulnerable

Overall crop prospects are good, though a short-term dry spell affected maize crops in the south

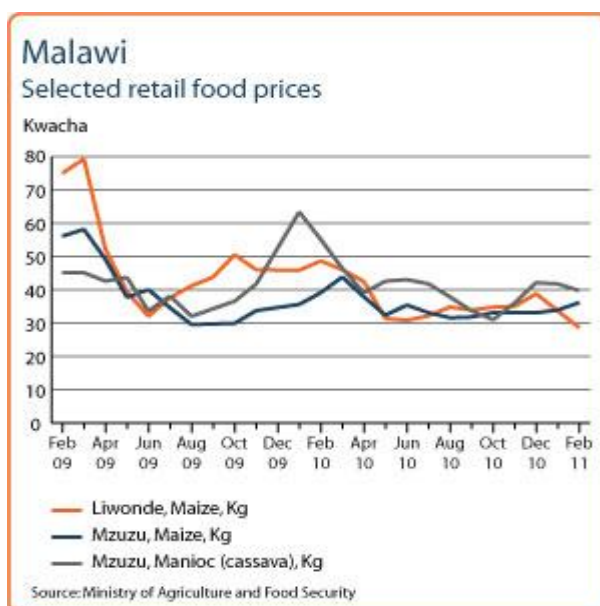
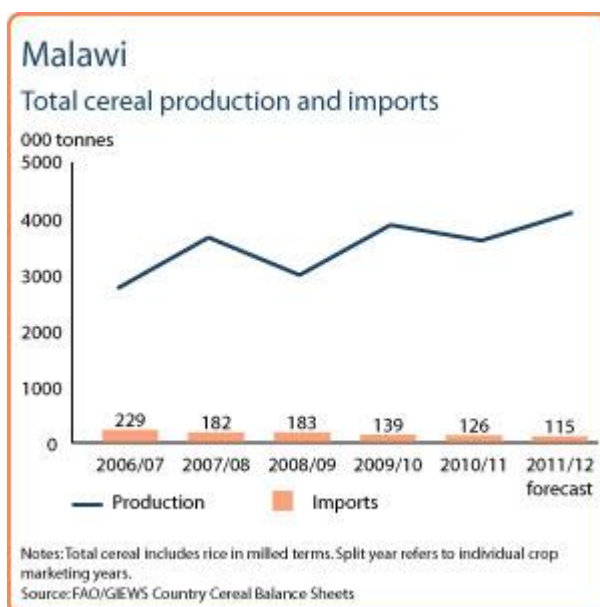
The Government's first round crop assessment, conducted during January, forecasts a record maize crop in the 2010/11 cropping season at about 3.9 million tonnes. Generally favourable rainfall over most of the country and input support through the Government's Farm Input Subsidy Programme (FISP), benefiting an estimated 1.6 million smallholder maize farmers, helped the optimistic outlook. However, a dry spell in February 2011 affected crops in some southern districts, with reports of crop wilting and premature drying, which could impact production levels, particularly for the late planted crop. The Government has recently announced the farm gate price for next season's crops, with prices for maize set at MWK 25 per kg, compared to MWK 35 for the previous year. Given the preliminary production estimates for 2011 harvest, the country is anticipated to retain a large surplus in the 2011/12 marketing year (April/March).

With regard to cash crops, an increase in the price of cotton induced farmers to expand plantings and this is expected to lead to a higher output in 2011. Preliminary estimates point to about 55 000 tonnes, compared with just under 30 000 tonnes in 2010.

Low and stable maize prices across the country

As a result of abundant national maize supplies, which have enabled the country to maintain significant stocks, low and comparatively stable prices have been sustained throughout the current marketing year. As of February 2011, the monthly average national price was MWK 31 per kg, compared with MWK 46 one year earlier. Prices have registered some increases in recent months, following seasonal patterns as households' increase market purchases. In the northern market of Mzuzu, maize was traded at MWK 36 per kg, about 8 percent lower than at the same month in 2010. Similarly, in the southern market of Liwonde, the monthly price remained low at MWK 29 per kg, about 40 percent below last year's level, having fallen marginally between January and February. ADMARC (Agricultural Development and Marketing Corporation), the Government's marketing agency, reduced its selling price for maize to MWK 40 per kg in February, down from MWK 60 earlier in the season, which is still above the prevailing national average as of February. This adjustment is expected to contribute in maintaining low maize prices.

Improved food security situation in the south



Conditions remain generally favourable in most areas of the country, due to a combination of lower staple food prices and generally good supplies. However, localized areas in some southern districts remain food insecure, following production shortfalls experienced last season. Recent heavy rains and minor flooding has also affected just over 5 000 households and caused localized crop damage, mostly in central areas. According to the Malawi Vulnerability Assessment Committee (MVAC) report issued in November 2010, an estimated 508 088 persons require food assistance. Currently, food aid distributions are targeting 74 724 people in Chikhwawa and 44 589 people in Nsanje.

Reference Date: 03-January-2011

FOOD SECURITY SNAPSHOT

- Favourable rains in central and southern regions benefit the 2010/11 main season's maize crop
- Prices of maize remain at low levels in most markets, reflecting abundant domestic supplies
- Improved food security conditions result in a reduction of the number of people in need of food assistance, primarily due to low maize prices

Good rains received in southern and central areas for the 2010/11 agricultural season

Planting of the main maize crop for the 2010/11 season is complete in most areas of the country. The Southern and Central regions have benefited from average to above average rains between October and the beginning of December, with substantial rain falling in the first dekad of December. Over the same period, the Northern region – which is the second largest producer of maize – received lower cumulative rainfall amounts compared to normal precipitation levels. Current meteorological reports indicate good crop growth throughout the country, with no major outbreak of pests or diseases. The Government continued the implementation of the Farm Input Subsidy Programme (FISP), which will benefit an estimated 1.6 million smallholder maize farmers, providing farmers with access to inputs at a subsidized price. Government reports indicate that as of the beginning of December, 95 percent of the fertilizer purchased under the FISP had been delivered to market distribution points.

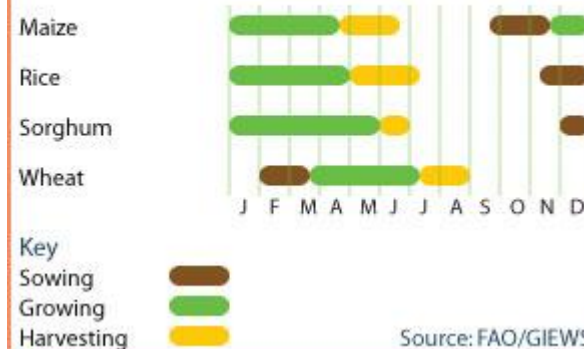
Better than expected maize harvest for the 2009/10 season

The latest official crop production estimates for 2010 indicate a maize harvest of 3.4 million tonnes, lower than the record output in 2009, but still well above average; despite the mid-season dry-spell that severely affected the low producing areas in the Shire Valley. Millet, sorghum, rice and wheat production also fell relative to the previous season. However, late rains in April and May, and an intensification of production under irrigation, led to an increase in the winter harvest of both maize and pulses; helping to boost food stocks of households who have access to irrigated land. Overall, the 2010 cereal harvest reached 3.6 million tonnes and domestic maize supplies, including carry-over stocks, will be more than sufficient to cover national consumption requirements in the 2010/11 marketing year (April/March). Imports of wheat and rice will continue to be required.

Tobacco and cotton production decline

There were smaller harvests for some cash crops in the 2009/10 season; tobacco production is estimated to have fallen by 3 percent compared to the 2008/09 season. The cotton output fell drastically – by about 60 percent below the previous season – mainly reflecting lower plantings as a result of a reduction in prices offered to farmers for the previous 2008/09 crop, as well as poor rainfall levels.

Crop calendar Malawi

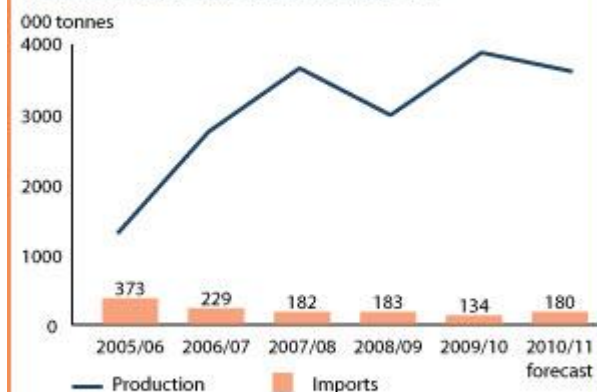


Malawi Cereal production

| | 2005-2009 average | 2009 | 2010 forecast | change 2010/2009 |
|--------------|-------------------|-------------|---------------|------------------|
| | '000 tonnes | | percent | |
| Maize | 2737 | 3662 | 3419 | -7 |
| Rice (paddy) | 98 | 131 | 110 | -16 |
| Sorghum | 51 | 59 | 54 | -8 |
| Others | 30 | 30 | 27 | -10 |
| Total | 2917 | 3881 | 3610 | -7 |

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

Malawi Total cereal production and imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

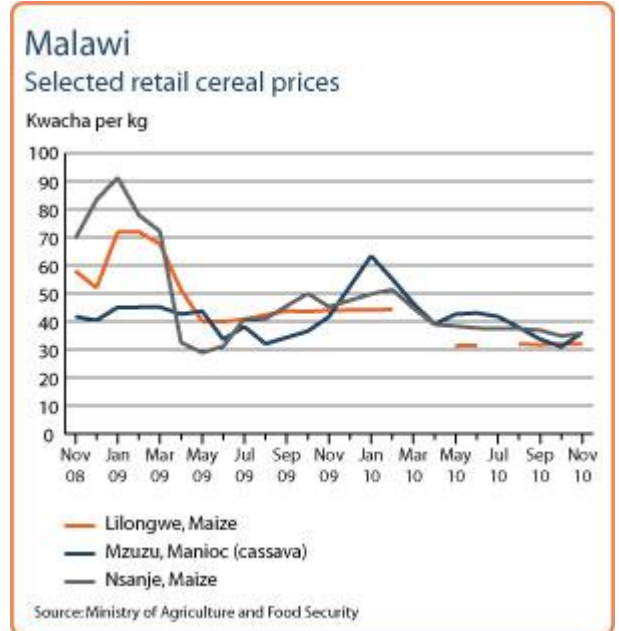
Maize prices lower than anticipated in southern markets

Conforming to seasonal trends and reflecting the expectations of another good crop, maize prices fell in March 2010 across most of the country and between May/June and November have remained relatively low. In Lilongwe, maize was traded at MWK 32 per kg in November, over one quarter lower compared to the same month in 2009. Similarly, in the southern market of Nsanje – a maize deficit area – November prices remained low, although marginally higher than in October. The lower than anticipated prices in the south reflect the availability of maize supplies from surplus regions within the country as well as imports from Mozambique.

The selling price for maize established by the Government's marketing agency, ADMARC, at MWK 60 per kg is currently considerably higher than the prevailing market prices and consequently ADMARC has a considerable stock of maize for which there is no demand domestically. To ease the situation, the Government has temporarily lifted the maize export ban, allowing 300 000 tonnes to be exported by private traders. Furthermore, informal maize imports are continuing to flow in southern Malawi from the surplus producing regions in northern Mozambique. However, the cumulative quantity of imported maize into southern Malawi between April and October is approximately half the amount compared to the previous year for the same period; this is due to the good domestic supplies and smaller price disparities between the two countries.

Improved food security situation in the south

The latest report by the Malawi Vulnerability Assessment Committee (MVAC) issued in November 2010 estimates that 508 088 persons will require food assistance, down from 1.1 million estimated in June. The reduction is a result of a combination of low maize prices, improved production of sweet potatoes and pulses, as well as a good harvest from the irrigated winter crops. Households in chronic food deficit areas become increasingly reliant on supplies from the market from May onwards (CFSVA March 2010), to satisfy their consumption requirements. The lower than expected prices this year have had a positive impact on poor households' purchasing power and on the overall food security situation in southern food deficit areas.



Reference Date: 14-September-2010

FOOD SECURITY SNAPSHOT

- Despite a maize harvest below last year's record, Malawi expects a surplus in maize supplies in 2010/11, for the fifth consecutive year.
- Lower market prices for maize reflect the abundant supplies.
- Maize prices in Lilongwe reach their lowest level in the past two years.
- But poor seasonal rains have resulted in lower crop production in southern areas where an estimated 1.06 million persons will require food assistance in 2010/11.

Better than expected maize harvest for the 2009/10 season

The latest official crop production estimates indicate a maize harvest of 3.4 million tonnes, lower than the record output last year, but still well above average. Despite the mid-season dry spell, which severely affected the low producing areas in the Shire Valley, rainfall levels in Central and Northern regions supported a better than expected maize crop. Millet, sorghum, rice and wheat production also fell relative to the previous season. The drop in sorghum and millet production is attributed to low rainfall levels received in main southern producing regions. Overall, the 2009/10 cereal harvest reached 3.6 million tonnes, slightly below the record level achieved in the previous season. Nationally, maize availability, including carry-over stocks, will still be more than sufficient to cover domestic cereal requirements.

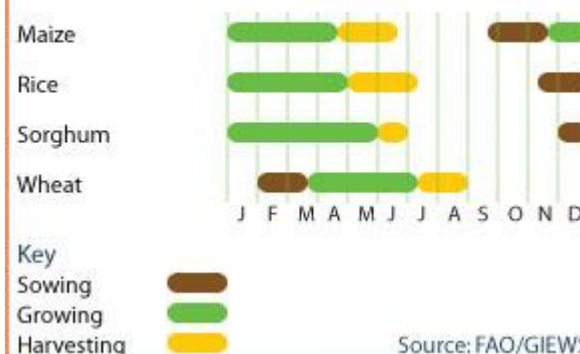
In addition to the lower cereal output, there were smaller harvests for both cotton and tobacco crops. The lower cotton prices offered to farmers last season, at about MWK 35 per kg down from MWK 60 in the previous season, and poor rainfall levels, are the main factors for the lower production levels, estimated at 29 165 tonnes. This represents a 60 percent decline compared the 2008/09 season.

Maize prices fall to their lowest levels compared to the previous two seasons

Conforming to seasonal trends and reflecting ample market supplies, maize prices began to fall from March across most of the country and since May/June price levels have been lower than the previous two seasons. In Lilongwe, prices in August at MWK 32.05 per kg were 24 percent lower compared to one year earlier. Similarly, in the southern market of Nsanje – a maize deficit area – prices are at a low level, MWK 37.43 per kg, having remained stable for the preceding four months. The selling price set by the Government marketing agency ADMARC, at MWK 60 per kg, is currently higher than the prevailing market prices.

The Government has temporarily lifted the maize export ban, allowing 300 000 tonnes to be traded. Furthermore, informal maize trade is continuing in southern Malawi, with maize being imported from the surplus producing regions in northern Mozambique. However, the price disparity between Malawi and Mozambique diminished this season compared to the previous year, and has consequently contributed to

Crop calendar Malawi

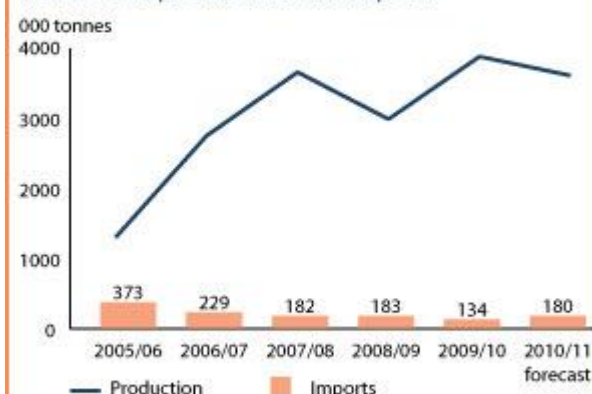


Malawi Cereal production

| | 2005-2009 | 2009 | 2010 | change |
|--------------|-------------|-------------|-------------|-----------|
| | average | | forecast | 2010/2009 |
| | 000 tonnes | | | percent |
| Maize | 2737 | 3662 | 3419 | -7 |
| Rice (paddy) | 98 | 131 | 110 | -16 |
| Sorghum | 51 | 59 | 54 | -8 |
| Others | 30 | 30 | 27 | -10 |
| Total | 2917 | 3881 | 3610 | -7 |

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

Malawi Total cereal production and imports

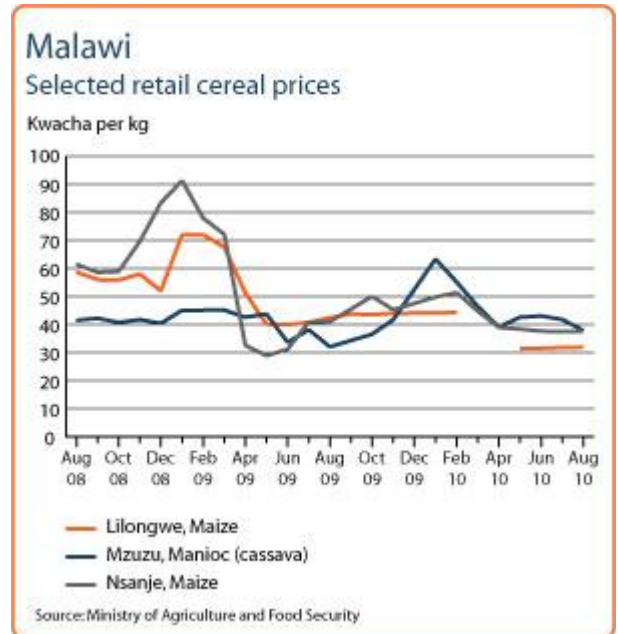


Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

lowering the quantity of maize traded. Maize grain inflows recorded at the Milanje/Muloza border point dropped by 54 percent in June 2010 compared to the same month last year.

Large number of people in the Southern region affected by mid-season dry spell

Despite there being adequate supplies of maize at the national level, the latest report by the Malawi Vulnerability Assessment Committee (MVAC) issued in June estimates that 1.06 million persons, who were adversely affected by the mid-season dry spell, will require food assistance. All 13 districts in the Southern region were affected, as well as one district from the Northern and one from the Central region. In the Southern region, Chikwawa and Nsanje districts were particularly affected by the water deficits, with estimates indicating a drop in crop production between 80 to 100 percent in localised areas. Furthermore, the downturn in cotton production and lower market prices has negatively impacted households' income and consequently their purchasing power.



Reference Date: 11-March-2010

FOOD SECURITY SNAPSHOT

- First forecast point to a sharp drop in 2010 cereal crop production from previous year's record, but still above average.
- Overall food security still favourable in the country, but conditions likely to worsen in the 2010/11 marketing year (April/March) especially in the Southern region.
- Maize prices have seasonably risen since their lows after the 2009 harvest especially in the South, but remain well below year earlier levels in spite of the poor 2010 crop prospects.

Sharp drop in 2010 cereal output from previous year record anticipated, but still above average

The 2009/10 crop season had started well with the availability of Government subsidized maize and legume seed and fertilizers to poor small-scale farmers, and an early start of the rainy season in October which favoured cereal crop plantings and early crop development. However, a prolonged dry spell in Central and most of the Southern region from early December to the second dekad of January has severely affected crops in most districts. In many southern areas the maize crop wilted and crop yields have been reduced in central areas of the country. Heavy rains resumed since the end of January but were too late for many standing crops in the Southern and part of the Central regions.

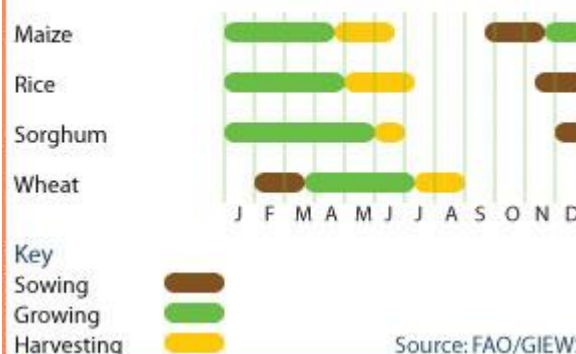
The first official crop assessment released in early March indicates a drop in maize production to 2.9 million tonnes for 2010, some 20 percent below the 2009 record but still some 8 percent above the average of the previous five years. The reduction in maize output from 2009 is due to lower yields per hectare anticipated (- 21 percent) while the area planted was almost unchanged. For all cereals in aggregate the expected reduction in output from the previous year is 20 percent but still some 6 percent above the previous five years average.

Overall food security remains favourable, but likely to worsen in the South and other areas affected by the drought

The latest report by the Malawi Vulnerability Assessment Committee (MVAC) issued in November showed that the overall food security situation in Malawi remained favourable. Notable exceptions was southern Malawi where some 275 000 food insecure population affected by poor 2009 crop production, reduced income from cotton sales, higher maize prices in the markets and low wage rates required food assistance. This is still being provided by the Government of Malawi with transport/distribution assistance from WFP.

Most of southern Malawi has been severely affected by the January drought and many areas where populations are currently being assisted because of last year's problems will not harvest a crop at all this year. Thus food assistance requirements in these areas are expected to rise in the next marketing year. The MVAC plans to conduct its first country wide assessment in late March to determine the numbers of people

Crop calendar Malawi

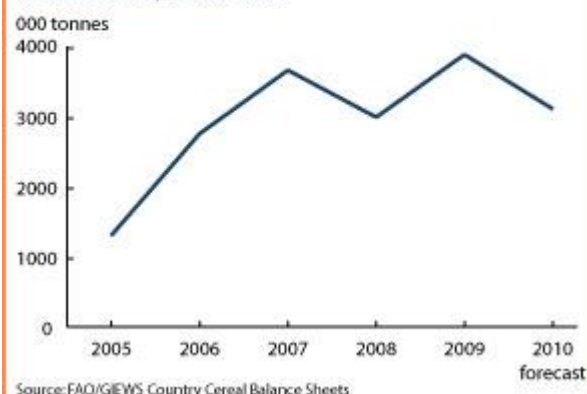


Malawi Cereal production

| | 2005-2009 average | 2009 | 2010 forecast | change 2010/2009 |
|--------------|-------------------|-------------|---------------|------------------|
| | 000 tonnes | | | percent |
| Maize | 2737 | 3662 | 2943 | -20 |
| Rice (paddy) | 99 | 131 | 103 | -21 |
| Sorghum | 51 | 59 | 37 | -37 |
| Others | 30 | 30 | 23 | -23 |
| Total | 2917 | 3881 | 3106 | -20 |

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

Malawi Total cereal production



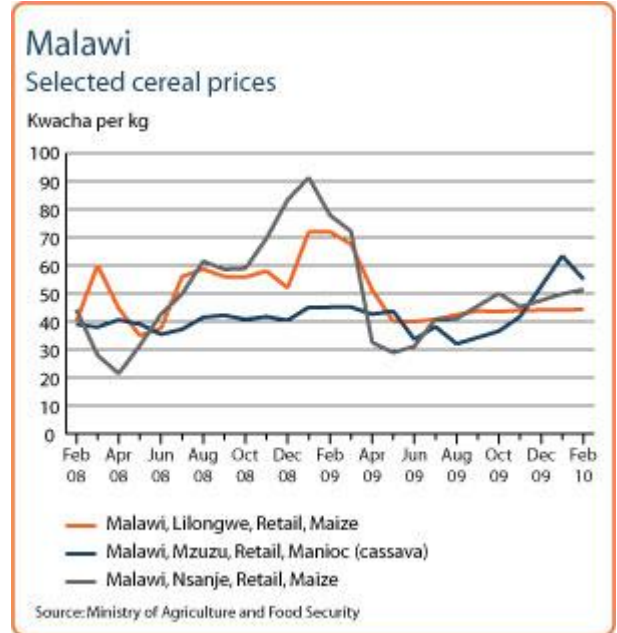
affected and the extent of food assistance requirements.

At the national level, no sharp deterioration of the food security situation is currently expected in the 2010/ 11 marketing year (April/March). The country has had a series of good to record crops in the last three years and the reduction in production this year is likely to be partly cushioned by the availability of carryover stocks especially from the 2009 record harvest. The National Food Reserve Agency (NFRA) and ADMARC have together over 200,000 of maize in stock and additional quantities are reported to be held by traders and by farmers.

Staple food prices rise, but remain relatively low in spite of poor crop prospects

Maize prices have remained relatively low in recent months, but have started to seasonably rise in most areas since late 2009 as the country entered the hunger season before the new harvest. The seasonal increase has been more marked in the traditionally deficit southern parts of the country. In February, the prospects for a sharp reduction in maize production this year has led to only a moderate increase in quotations especially in the South, probably reflecting the continued availability of supplies in the market from the previous year domestic surplus production, as well as from Mozambique and government food assistance deliveries.

In Lilongwe, maize was quoted at MWK 44.3/kg in February, up from MWK 40/kg soon after harvest in May 2009 but still sharply below the price in January 2009 (MWK 72/kg). In the South (Nsanje), maize prices have increased faster in recent months, from a low of MWK 29/kg in May 2009 to MWK 51/kg in February 2010 with only a 3 percent increase registered in the last month in spite of the poor crop prospects. Even in the South the retail price of maize was in February still below the MWK 52/kg minimum sale price by the Government marketing agency ADMARC.



Reference Date: 1-February-2010

FOOD SECURITY SNAPSHOT

- Prospects for 2010 crops are poor in the south due to dry spell since early December. This follows a 2009 record cereal production due to good rainfall and input distribution.
- After the sharp fall early in 2009, maize prices have risen again since last May especially in the south, and remain much higher than two years earlier, despite increased maize availability
- Overall food security is favourable in the country, but it has worsened in several districts in the south

Unfavourable 2010 crop prospects in large part of the country

Distribution of Government subsidized maize and legume seed and fertilizers to poor small-scale farmers have been made in most parts of the country. Weather conditions were mostly favourable in October-November for land preparation, planting and germination of the main season cereal crops. Normal to above normal rains continued in the Northern region favouring crop development, but in the Southern region a prolonged dry spell from early December to the second dekad of January has severely affected most districts. Parts of the main producing areas in the Central region were also affected in the first half of January. In many southern areas the maize crop had wilted and farmers were waiting for the rains to resume to attempt to replant crops. Heavy rains fell in most of the country in the 3rd dekad of January and while probably too late for standing crops in the Southern region it could allow planting to resume. But much will depend on the rainy season extending beyond the normal ending period in April. Revised climate models indicate that in the January-March period the whole of Malawi is expected to receive normal to above normal rains.

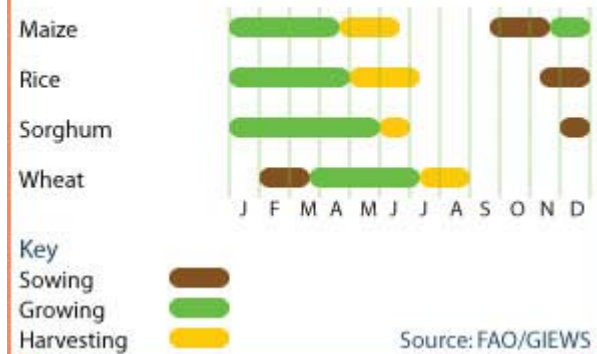
Record maize harvest for 2009

The 2009 maize harvest (completed in May) was a record 3.7 million tonnes, 61 percent over the five year average. This level of production reflects favourable weather and the availability of inputs through the Government subsidy scheme. Domestic utilization for the 2009/10 marketing year (April/March) is estimated at around 3 million tonnes, resulting in a national surplus for the third consecutive year. Localised areas in the Lower Shire Valley experienced low crop production, on account of the prolonged dry spell from February to March. However, informal cross border trade from Mozambique is expected to stabilise food supplies and maintain cereal availability in the affected region.

Maize prices remain high, despite a favourable market outlook

After declining sharply from early 2009 to June reflecting the record harvest, prices of maize have started to seasonably rise slightly in most areas since late 2009 as the country entered the hunger season before the new harvest. However, maize prices were in early January 2010 much below the previous year levels reflecting ample supplies on the market. In Lilongwe the maize price fell from a high of MWK 72/kg in January and February 2009, the peak of the hunger period, to below MWK 40/kg soon after harvest in May but since then it has climbed

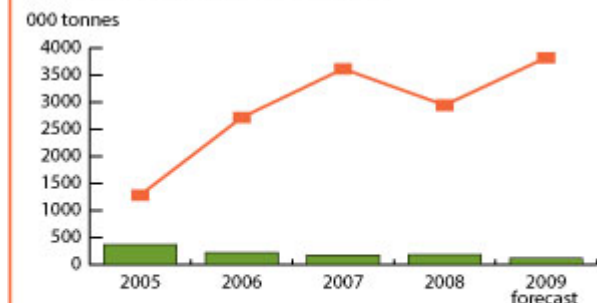
Crop calendar Malawi



Malawi Cereal production and imports

| Cereal production | 2004-2008 | 2008 | 2009 | change* 2009/2008 |
|----------------------|-------------|-------------|-------------|----------------------|
| | average | 000 tonnes | | |
| Maize | 2326 | 2777 | 3662 | 31.8% |
| Rice (milled) | 53 | 74 | 75 | 0.1% |
| Sorghum | 48 | 62 | 59 | -5.5% |
| Other | 26 | 35 | 29 | -14.2% |
| Total Cereals | 2455 | 2948 | 3825 | 29.7% |

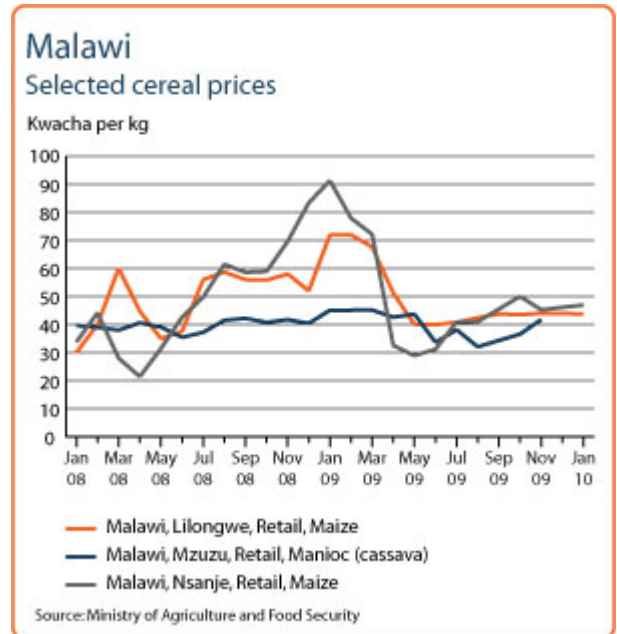
* Percentage change calculated from unrounded data.



again to MKW 44/kg in January, almost 50 percent higher than two years earlier. In the southern deficit areas (Nsanje and Chikwawa) maize prices after their fall at harvest time, have risen faster than in other areas from MKW 29 in May to MKW 47/kg in early January in Nsanje..

Overall food security remains favourable, but it worsened in several districts in the south

A report issued in November by the Malawi Vulnerability Assessment Committee (MVAC) has confirmed that the overall food security situation in Malawi remains favourable. However the number of food insecure population in the southern Malawi districts of Balaka, Chikwawa and Nsanje has increased from 147 000 estimated in June to 275 000. In these districts a prolonged dry spell had led to substantial maize crop reduction in 2009. The increase in the estimate of food insecure reflects a combination of reduced income from cotton sales, higher maize prices in the markets and low wage rates which have reduced the purchasing power of affected populations. Government has released 6 678 tons of maize from the SGR for distribution to affected people and asked WFP to coordinate the response. Food distribution of WFP commodities to 147 000 people started in late November and will continue until April 2010.



Reference Date: 20-January-2010

FOOD SECURITY SNAPSHOT

- Prospects for 2010 crops are poor in the south due to dry spell since early December. This follows a 2009 record cereal production due to good rainfall and input distribution.
- After the sharp fall early in 2009, maize prices have risen again since last May especially in the south, and remain much higher than two years earlier, despite increased maize availability
- Overall food security is favourable in the country, but it has worsened in several districts in the south

Unfavourable 2010 crop prospects in large part of the country

Distribution of Government subsidized maize and legume seed and fertilizers to poor small-scale farmers have been made in most parts of the country. Weather conditions were mostly favourable in October-November for land preparation, planting and germination of the main season cereal crops. Normal to above normal rains continued in north and favouring crop development, but in the south a prolonged dry spell has severely affected most regions since early December and in parts of the centre since early January. In many southern areas the maize crop had wilted and farmers were waiting for the rains to resume to attempt to replant crops. Revised climate models indicate that in the January-March period the whole of Malawi is expected to receive normal to above normal rains this year.

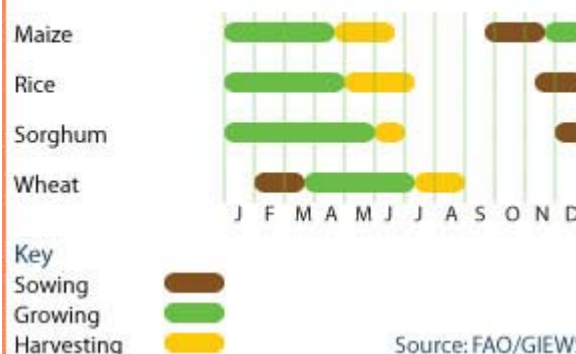
Record maize harvest for 2009

The 2009 maize harvest (completed in May) was a record 3.7 million tonnes, 61 percent over the five year average. This level of production reflects favourable weather and the availability of inputs through the Government subsidy scheme. Domestic utilization for the 2009/10 marketing year (April/March) is estimated at around 3 million tonnes, resulting in a national surplus for the third consecutive year. Localised areas in the Lower Shire Valley experienced low crop production, on account of the prolonged dry spell from February to March. However, informal cross border trade from Mozambique is expected to stabilise food supplies and maintain cereal availability in the affected region.

Maize prices remain high, despite a favourable market outlook

After declining sharply from early 2009 to June reflecting the expectation of a record harvest, prices of maize have started to rise again in most areas, although they were in early January 2010 much below a year earlier levels. In Lilongwe the maize price fell from a high of MWK 72/kg in January and February 2009, the peak of the hunger period, to below MWK 40/kg soon after harvest in May but since then it has climbed again to MWK 44/kg in January, almost 50 percent higher than two years earlier. In the southern deficit areas (Nsanje and Chikwawa) maize prices after their fall at harvest time, have risen faster than in other areas from MKW 29 in May to MWK 47/kg in early January in Nsanje..

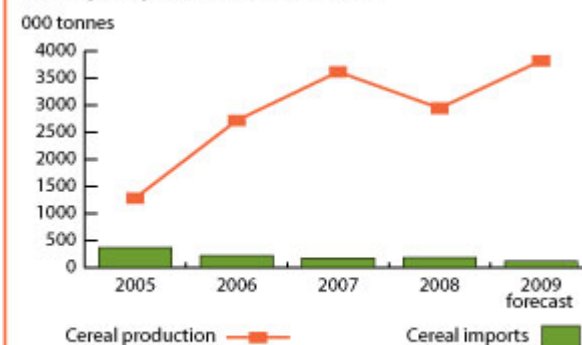
Crop calendar Malawi



Malawi Cereal production and imports

| Cereal production | 2004-2008 | 2008 | 2009 | change* |
|----------------------|-------------|-------------|-------------|--------------|
| | average | | forecast | 2009/2008 |
| | 000 tonnes | | | percent |
| Maize | 2326 | 2777 | 3662 | 31.8% |
| Rice (milled) | 53 | 74 | 75 | 0.1% |
| Sorghum | 48 | 62 | 59 | -5.5% |
| Other | 26 | 35 | 29 | -14.2% |
| Total Cereals | 2455 | 2948 | 3825 | 29.7% |

* Percentage change calculated from unrounded data.



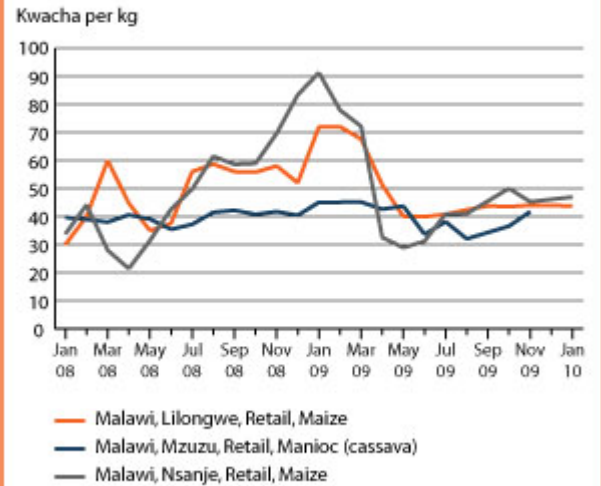
Source: FAO/GIEWS Country Cereal Balance Sheets

Overall food security remains favourable, but it worsened in several districts in the south

A report issued in November by the Malawi Vulnerability Assessment Committee (MVAC) has confirmed that the overall food security situation in Malawi remains favourable. However the number of food insecure population in the southern Malawi districts of Balaka, Chikwawa and Nsanje has increased from 147 000 estimated in June to 275 000. In these districts a prolonged dry spell had led to substantial maize crop reduction in 2009. The increase in the estimate of food insecure reflects a combination of reduced income from cotton sales, higher maize prices in the markets and low wage rates which have reduced the purchasing power of affected populations.

Government has released 6 678 tons of maize from the SGR for distribution to affected people and asked WFP to coordinate the response. Food distribution of WFP commodities for 147 000 people started in late November and will continue until April.

Malawi Selected cereal prices



Reference Date: 4-January-2010

FOOD SECURITY SNAPSHOT

- Early prospects for 2010 crops mostly favourable so far. This follows a 2009 record cereal production due to good rainfall and input distribution
- After the sharp fall early in 2009, maize prices have risen slightly since last July, and remain much higher than in 2007, despite increased maize availability
- Overall food security is favourable in the country, but it has worsened in several districts in the south

Rains mostly favourable so far for 2010 crops

Distribution of Government subsidized maize and legume seed and fertilizers to poor small-scale farmers have been made in most part of the country. Weather conditions have been mostly favourable so far for land preparation, planting and germination of the main season cereal crops. However a dry period in the second half of December has reduced soil crop moisture in southern Malawi and resumption of rains is required in January. Climate models indicate that the January-March 2010 period the northern parts are expected to receive above normal to normal rains while the southern part could experience normal to above normal precipitations. This could result in damaging floods in several areas later in the season.

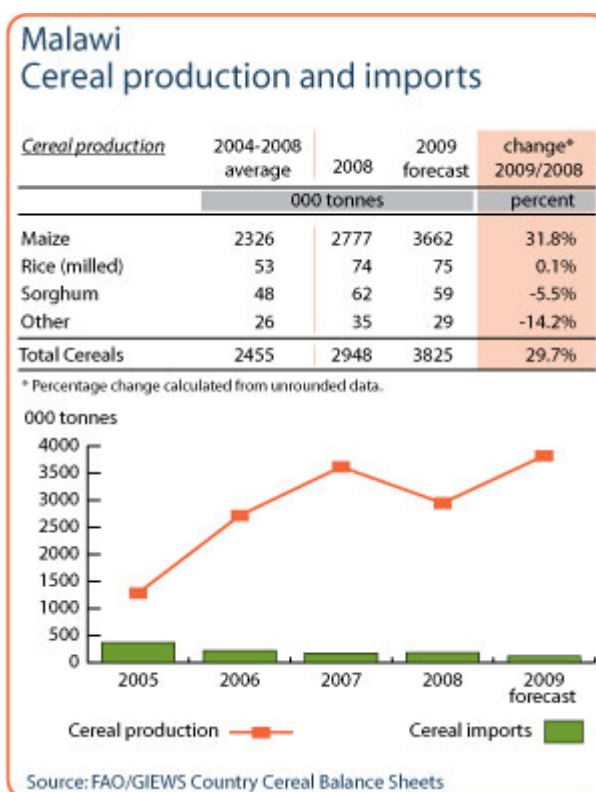
Record maize harvest for 2009

The 2009 maize harvest (completed in May) was a record 3.7 million tonnes, 61 percent over the five year average. This level of production reflects favourable weather and the availability of inputs through the Government subsidy scheme. Domestic utilization for the 2009/10 marketing year (April/March) is estimated at around 3 million tonnes, resulting in a national surplus for the third consecutive year. Localised areas in the Lower Shire Valley experienced low crop production, on account of the prolonged dry spell from February to March. However, informal cross border trade from Mozambique is expected to stabilise food supplies and maintain cereal availability in the affected region.

Maize prices remain high, despite a favourable market outlook

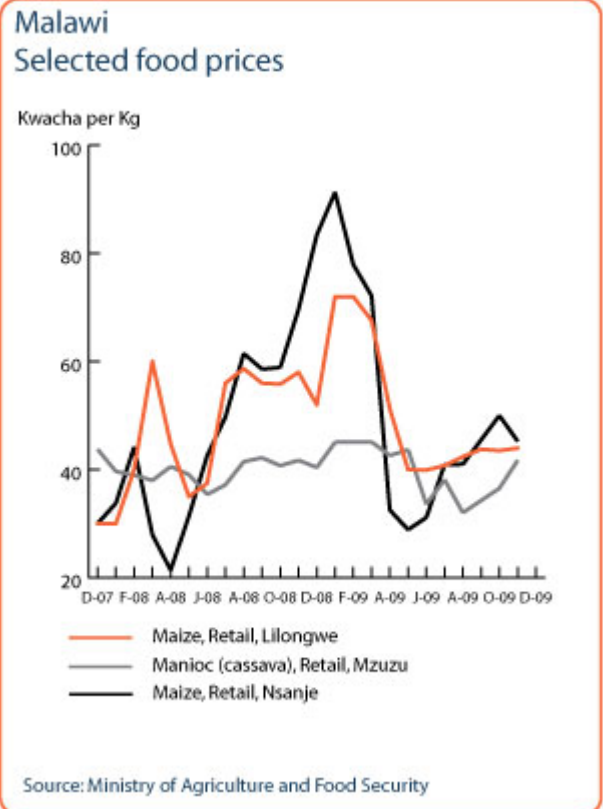
After declining sharply from early 2009 to June reflecting the expectation of a record harvest, prices of maize have started to rise again in most areas, although they remained in November much below a year earlier levels. In Lilongwe the maize price fell from a high of MWK 72/kg in January and February 2009, the peak of the hunger period, to below MWK 40/kg in June but since then it has climbed again to MWK 44/kg in November, almost twice as high as two years earlier. In the south deficit areas maize prices have risen faster from May to October (from MWK 29 to 42/kg), but fell somewhat in November, probably reflecting the expectation of the release on the market of maize from ADMARC, the Government marketing organization, and of the start of the distribution of WFP emergency supplies.

Overall food security remains favourable, but it



worsened in several districts in the south

A report issued in November by the Malawi Vulnerability Assessment Committee (MVAC) has confirmed that the overall food security situation in Malawi remains favourable. However the number of food insecure population in the southern Malawi districts of Balaka, Chikwawa and Nsanje has increased from 147 000 estimated in June to 275 000. In these districts a prolonged dry spell had led to substantial maize crop reduction. The increase in the estimate of food insecure reflects a combination of reduced income from cotton sales, higher maize prices in the markets and low wage rates which have reduced the purchasing power of affected populations. Food distribution of WFP commodities for 147 000 people was to begin in late November, but there is an urgent need to source additional funding to meet the requirement up to March 2010 of the increased number of affected people.



Reference Date: 09-September-2009

FOOD SECURITY SNAPSHOT

- A 2009 record cereal production due to good rainfall and input distribution
- Maize prices have fallen, but remain at double the level in 2007, despite increased maize availability
- Food security has improved in the country, with the exception of the Lower Shire Valley in the far south

Record maize harvest for 2009

The 2009 maize harvest (completed in July) reached an estimated 3.7 million tonnes, 32 percent above last year's good level and 61 percent over the five year average. Normal cumulative rainfall levels throughout the country from October 2008 to April 2009, coupled with the continuation of the Government's Input Subsidy Scheme, supported the production increase. Domestic utilization for the 2009/10 marketing year (April/March) is forecast at around 3 million tonnes, resulting in a national surplus for the third consecutive year. Localised areas in the Lower Shire Valley experienced low crop production, on account of the prolonged dry spell from February to March. However, informal cross border trade from Mozambique is expected stabilise food supplies and maintain cereal availability in the affected region.

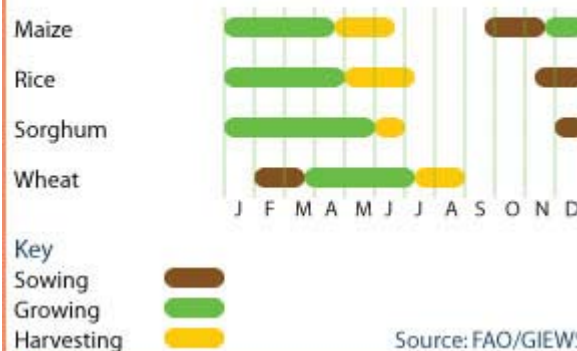
Maize prices continue to climb, despite improved market supplies

In spite of the reported exportable surplus and only a small volume of exports during 2008/09 marketing year (April/March), maize prices steadily climbed since June 2008 reaching a high of MWK 72/kg in Lilongwe in January and February 2009, the peak of the hunger period. The arrival of the new harvest in April, and therefore increased market supplies, has led to a seasonal decline in prices. However, in August 2009 maize prices were MWK 42/kg in the Lilongwe, more than double the level of two years earlier. In September, the Grain Traders Association of Malawi announced it will export 80 000 tonnes of maize to Kenya and Zimbabwe, at a price of USD 340 per tonne.

Food security improved, but pockets of food insecurity exist in the south

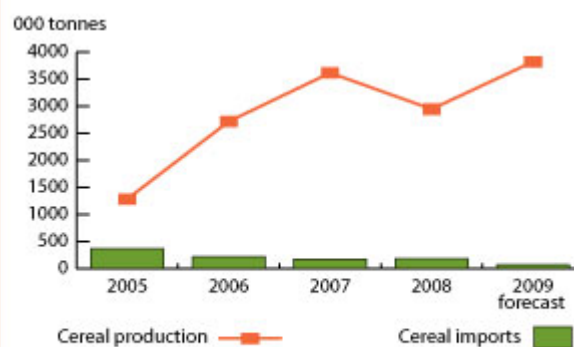
Preliminary estimates from the Malawi Vulnerability Assessment Committee (MVAC) report reveal that 147 492 people in Lower Shire Valley will be food insecure during the 2009/10 marketing year, due to poor production levels in the region. It is estimated that 6 678 tonnes of cereals will be required for distribution to the affected population. In the rest of the country, the food security situation has improved following the 2009 bumper crop, with the majority of households reportedly attaining adequate stocks.

Crop calendar Malawi



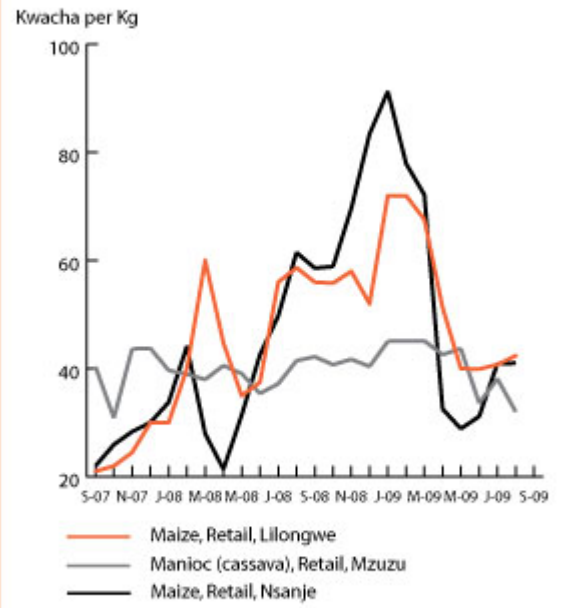
Cereal production and imports Malawi

| Cereal production | 2004-2008 | 2008 | 2009 | change |
|----------------------|-------------|-------------|-------------|--------------|
| | average | | forecast | 2009/2008 |
| | 000 tonnes | | | percent |
| Maize | 2326 | 2777 | 3662 | 31.9% |
| Rice (milled) | 53 | 75 | 75 | 0% |
| Sorghum | 48 | 62 | 59 | -4.8% |
| Other | 26 | 34 | 29 | -14.7% |
| Total Cereals | 2455 | 2948 | 3825 | 29.7% |



Source: FAO/GIEWS Country Cereal Balance Sheets

Malawi Selected food prices



Source: Ministry of Agriculture and Food Security