



GIEWS Country Brief Zambia

Reference Date: 25-January-2022

FOOD SECURITY SNAPSHOT

- Late onset and reduced seasonal rains, particularly in eastern parts, dampen production prospects for 2022 cereal crops
- Domestic cereal supplies in 2021/22 marketing year (May/April) are satisfactory; national maize stocks and exports foreseen to increase
- Prices of maize generally stable and slightly lower year on year at end of 2021
- Lower prevalence of food insecurity in first quarter of 2022 compared to 2021, but still estimated 1.6 million people need assistance

Poor rains impair 2022 crop prospects

Planting of the 2022 cereal crops has concluded. Early cropping conditions across the country have been mixed and cereal production in 2022 is forecast to decline to a level close to the average, which would be substantially below the near-record output of the previous year, largely reflecting expected year-on-year output reductions in eastern areas.

In the eastern part of the country, monthly rainfall amounts in November and December 2021 were below average and, in combination with multiple days with above-average temperatures, contributed to reducing soil moisture levels that affected planting and crop germination. Remote sensing data in mid-January depicted low values of vegetation indicators, inferring delays in planting and stunted crop growth in areas where planting had taken place. Conditions are of particular concern in Eastern and Northern provinces that, combined, produce about 30 percent of the national maize output.

In central and western areas, although cumulative rainfall has also been below average, the temporal distribution of precipitation has been comparatively even and consequently vegetation conditions in cropped areas were closer to the average values in early January 2022.

Although most parts of the country received substantial rains in the first half of January 2022, helping to reduce seasonal rainfall deficits and instigate an improvement in vegetation conditions in cropped areas, weather forecasts for February and March 2022 indicate a higher-than-normal likelihood of below-average rainfall amounts. These months are a critical period for the development of cereal grains and water stress may cause large yield reductions. The heavy rains in early January also caused some

Zambia

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Zambia

Cereal Production

	2016-2020 average	2020	2021 estimate	change 2021/2020
	000 tonnes			percent
Maize	2 879	3 387	3 620	6.9
Wheat	180	192	206	7.2
Rice (paddy)	34	35	67	93.2
Others	52	70	61	-12.9
Total	3 146	3 684	3 954	7.3

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

localized flooding and damage in the Southern Province, while Tropical Cyclone Ana, which made landfall in Mozambique on 24 January, could bring more heavy rains to southern areas.

Bumper 2021 harvest shores up stocks and increases export availabilities

Cereal supplies in the 2021/22 marketing year (May/April) are estimated to exceed the five-year average on account of the near-record harvest in 2021. As a result, domestic supplies of maize, the primary staple food, are more than sufficient to satisfy domestic utilization and to allow the country to build stocks and increase exports. Maize stocks are foreseen to increase to more than 600 000 tonnes, a well above-average level. Maize exports are also forecast at an above-average quantity, and between April and October 2021 (the latest available data), about 60 000 tonnes had already been exported, nearly twice the quantity of the same period in 2020.

Lower maize prices in 2021

Nominal retail prices of maize grain in December 2021 were 8 percent lower on a yearly basis, principally as a result of the effects of the large domestic supplies. Prices of maize grain throughout 2021 were also relatively stable and prices of maize meal products were similarly lower year on year in December.

In the coming months, the impact of the removal of a price cap on petrol at the end of 2021 is expected to put pressure on cereal prices and could amplify seasonal upward trends that typically persist until the harvest period in April. In addition, if rainfall for the remainder of the cropping season continues to be unfavourable, as forecasted, the negative impact on this year's harvest could add pressure on staple food prices in 2022.

Lower prevalence of food insecurity

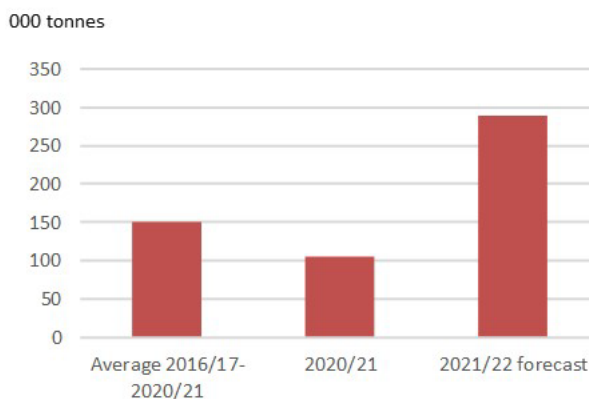
About 1.58 million people are estimated to face acute severe food insecurity, IPC Phase 3 (Crisis), until at least March 2022, according to the latest [IPC analysis](#). The current population in need of assistance is, however, about 150 000 people below the figure in the same period in 2021 and importantly, there are no people assessed to be in IPC Phase 4 (Emergency). The improvement in conditions is mostly due to the bumper 2021 harvest, which boosted households' food availability and increased income-earning opportunities through larger crop sales.

Although the total number of food insecure people is lower year on year, food insecurity is still affecting about 9 percent of the national population. Localized shortfalls in crop production in 2021, due to periods of excessive rainfall and the impact of pests, are the key drivers of the current food insecurity situation, whilst structural impediments and high rates of poverty continued to render rural households highly vulnerable to weather shocks. The impact of the COVID-19 pandemic, primarily due to constraints on incomes and consequently economic access to food, has also been a factor contributing to food insecurity.

Disclaimer: The designations employed and the presentation of material in this information product do not imply the expression of any opinion whatsoever on the part of FAO concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries.

Zambia

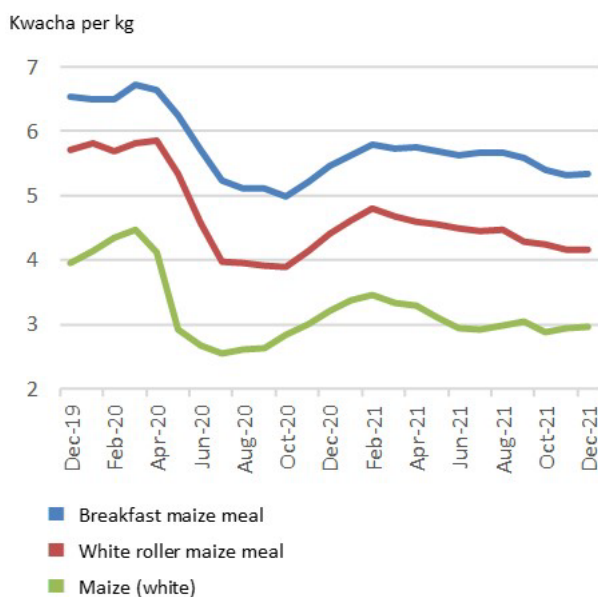
Cereals Exports



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.

Zambia

Retail prices of maize



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



GLEWS Country Brief Zambia

Reference Date: 11-August-2021

FOOD SECURITY SNAPSHOT

- Cereal production in 2021 estimated at well above-average level, underpinned by expansion in plantings and beneficial weather conditions
- Large harvest boosts export prospects in 2021/22 marketing year
- Prices of maize declined seasonally, but remained slightly higher year on year in June
- High prevalence of food insecurity in early 2021 amid economic downturn, but conditions foreseen to improve on account of large harvest

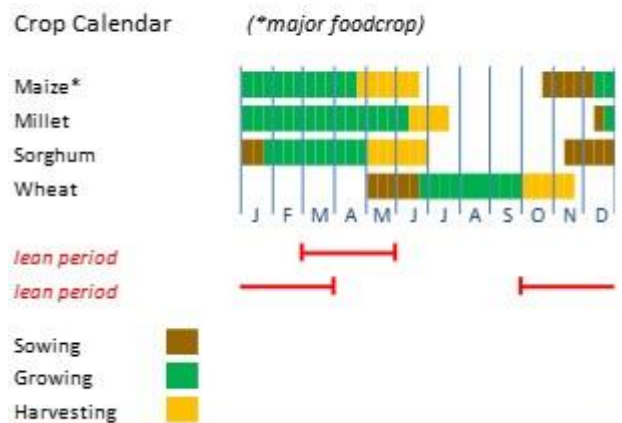
Cereal production increases to above-average level in 2021

The 2021 main season cereal harvest was completed in July and harvesting of the minor winter wheat crop is expected to be finalized in November. Total cereal production, the bulk of which is maize, is forecast at about 4 million tonnes in 2021, which includes an expected above-average winter wheat crop. At this level, cereal production in 2021 would be well above the five-year average and about 7 percent higher than the previous year. The increase reflects an expansion in the area planted with cereals, driven by continued government support to smallholder farmers to access subsidized agricultural inputs and favourable weather conditions at planting time. In addition, conducive rainfall throughout the season supported the attainment of high crop yields. Minor and localized crop losses were reported in parts of Southern and Western provinces due to infestations of African Migratory Locust (AML) since 2020, but control operations by the government, with support of FAO, minimized the impact on this year's agricultural output.

Large harvest boosts export prospects in 2021/22

In consideration of the above-average harvest in 2021, cereal supplies in the 2021/22 marketing year (May/April) are estimated to be more than sufficient to meet the national consumption requirements and enable the country to increase exports quantities compared to the low volumes of the previous three years owing to smaller domestic harvests. In 2021/22, maize exports could reach an above-average level of nearly 400 000 tonnes. However, as most countries in the subregion also registered large outputs in 2021, import needs within the subregion are lower than normal and the country may have to seek export markets outside of Southern Africa.

Zambia



Source: FAO/GIEWS, FEWSNET.

Zambia

Cereal Production

	2016-2020 average	2020	2021 estimate	change 2021/2020
	000 tonnes			percent
Maize	2 879	3 387	3 620	6.9
Wheat	180	192	206	7.2
Rice (paddy)	34	35	67	93.2
Others	52	70	61	-12.9
Total	3 146	3 684	3 954	7.3

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

Cereal imports in 2021/22 are forecast slightly above the average and almost entirely consist of wheat and rice, cereals that the country does not produce in large volumes.

National cereal stocks are also forecast to increase in 2021/22, driven mostly by an expected large maize inventory that is likely to reach a level nearly double the five-year average. As well as larger stocks held by public and private institution, households are also expected to see improvement in their supplies.

Prices of maize decreased but slightly higher on yearly basis

The national average price of maize grain declined seasonally between February and June 2021, as the newly harvested crops boosted market supplies. The seasonal decreases were less pronounced than the previous year and in June, prices were about 10 percent higher on a yearly basis, partly supported up by a weak currency following a sharp depreciation in 2020. However, a steep increase in the price of copper in 2021, a key export commodity for the country, helped to bolster foreign currency reserves and led to a rallying of the currency in late July. This recent appreciation, along with substantial cereal supplies, is expected to ease inflationary pressure on food prices in 2021 compared to the previous year.

High prevalence of food insecurity in early 2021 amid economic downturns

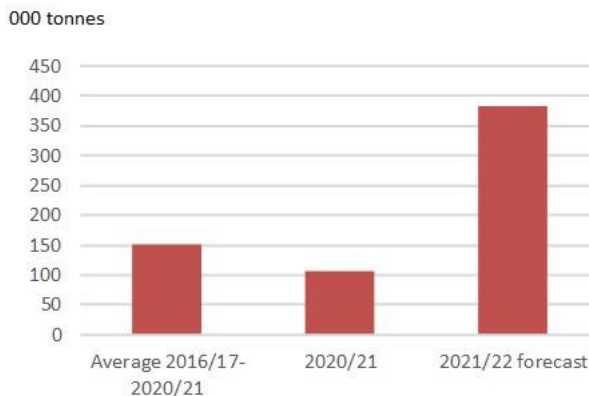
An estimated 1.73 million people were assessed to have faced acute severe food insecurity (IPC Phases 3 and 4) during the February-March 2021 period, according the latest [IPC analysis](#). Although the total number of food insecure was lower year on year, food insecurity still affected more than 20 percent of the rural population, reflecting constraints on access to food following a reduction of incomes due to the pandemic-associated economic downturn and localized shortfalls in production in 2020 that tightened food availability.

The effects of the COVID-19 pandemic is still weighing on the economy and only a modest recovery is forecast in 2021, inferring limited recuperations in households' incomes this year. The low supply of vaccines also maintains a high risk that the country could face further surges in COVID-19 cases, having experienced a third wave as recently as July. Although the large harvest has considerably improved food availability, the effects of the economic downturn is likely to limit improvements in food insecurity in 2021, primarily due to constraints on incomes and consequently economic access to food.

Disclaimer: The designations employed and the presentation of material in this information product do not imply the expression of any opinion whatsoever on the part of FAO concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries.

Zambia

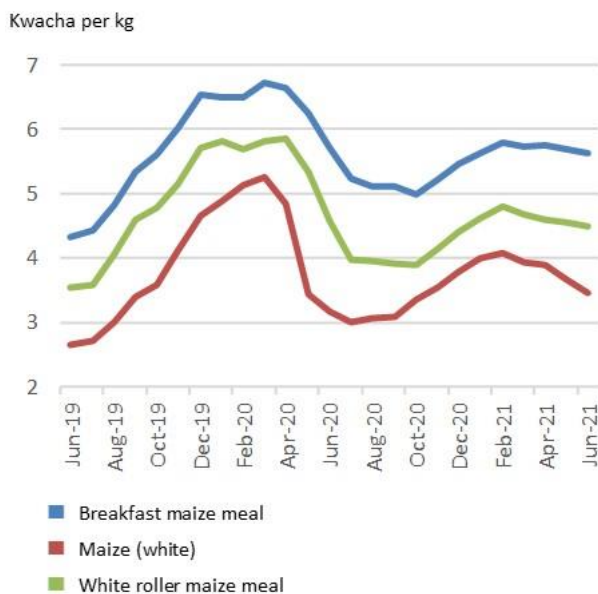
Cereals Exports



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.

Zambia

Retail prices of maize



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



GIEWS Country Brief Zambia

Reference Date: 26-March-2021

FOOD SECURITY SNAPSHOT

- Maize production in 2021 expected at bumper level, but concerns remain due to locust infestations
- Cereal imports in 2020/21 estimated above five-year average
- Prices of maize lower year on year reflecting large market supplies
- High prevalence of food insecurity in early 2021 amid economic downturn associated to COVID-19 pandemic

Maize production in 2021 expected at bumper level, but concerns remain due to locust infestations

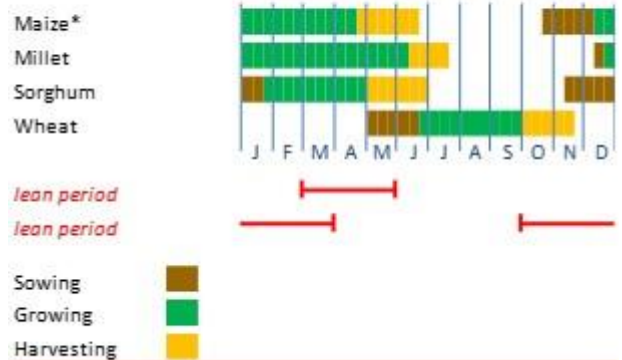
Harvesting of the 2021 main maize crop is expected to start in April and production is preliminarily forecast at a bumper level of 3.5 million tonnes, slightly higher than the previous year's good outturn and over 20 percent above the previous five-year average. The expected bumper output mainly reflects an expansion in the planted area, mainly driven by continued Government support to smallholder farmers to access subsidized agricultural inputs and favourable weather conditions. Average to above-average rainfall between October and December 2020 resulted in adequate soil moisture levels and enhanced planting operations. Rains during the first quarter of 2021 were well distributed, resulting in good vegetation conditions ahead of the harvest and auguring well for crop yields.

Notwithstanding the positive effects of beneficial weather, infestations of African Migratory Locust (AML) remain a risk to 2021 crops. Reports from the country indicate that AML swarms increased between January and March 2021 in southern and western parts, where nearly 30 percent of the national maize output is produced, as the abundant rainfall has been conducive for insect breeding. With support from FAO, the Government conducted an evaluation of the affected areas to establish the level of infestation and assess the damage to crops as well as households' food security; the results of the assessment will be released in April. FAO is also supporting the establishment of an early warning system that seeks to collect accurate and timely data about the AML situation and this is expected to be launched in May.

Zambia

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Zambia

Cereal Production

	2016-2020 average	2020	2021 forecast	change 2021/2020
	000 tonnes			percent
Maize	2 879	3 387	3 500	3.3
Wheat	180	192	200	4.2
Rice (paddy)	34	35	48	39.3
Others	52	70	71	1.4
Total	3 146	3 684	3 819	3.7

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Cereal imports in 2020/21 forecast above five-year average

Cereal imports in the 2020/21 marketing year (May/April) are forecast at about 74 000 tonnes, moderately down from the previous year's level, but 15 percent above the five-year average. Imports of wheat and rice are estimated at 40 000 and 28 000 tonnes, respectively. Imports of maize are expected to be negligible reflecting the large domestic availabilities from the 2020 above-average harvest and expectations of a bumper production to be harvest in 2021.

Exports of maize in 2020/21 are estimated at 100 000 tonnes, about three times more than the reduced volumes in the previous two marketing years. The large exportable quantity reflects ample availabilities from the 2020 bumper harvest and the increased import demand, particularly from Zimbabwe, United Republic of Tanzania and Kenya. In addition, a weak national currency supported the high level of exports. The Zambian kwacha has steadily lost its value against the US dollar since early 2020 and as of February 2021 had depreciated by about 50 percent on a yearly basis.

Prices of maize lower year on year reflecting large market supplies

Following a sharp decline between April and October 2020, prices of maize and maize meal increased between November 2020 and February 2021 in line with seasonal trends. The price gains were tempered, however, by the large market supplies from the above-average 2020 maize output, which also helped contain inflationary pressure stemming from the weak national currency. As of February 2021, the annual inflation rate stood at 22 percent, while prices of maize and maize meal were 15 percent below their earlier-year values.

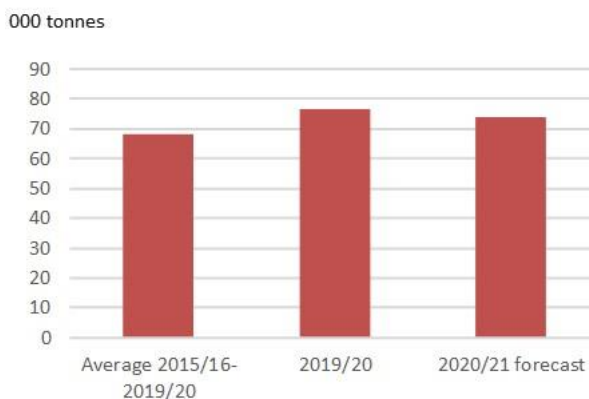
High prevalence of food insecurity in early 2021 amid economic downturn associated with COVID-19 pandemic

According to the latest IPC acute food insecurity analysis, about 1.73 million people are estimated to be facing food insecurity (IPC Phases 3 and 4) during the February-March 2021 period, which corresponds to the peak of the lean season, when rural households are more reliant on market supplies and daily wage labour to meet their consumption needs. Although the total number of food insecure has fallen year on year, food insecurity still affects more than 20 percent of the rural population, reflecting severe constraints on access to food following the reduction of incomes due to the pandemic-associated economic downturn in 2020. Infestations of AML also remain a concern, as they could result in localized production losses and have negative impacts on households' food security.

To mitigate the adverse impacts of the COVID-19 pandemic, the Government expanded the coverage of its social protection schemes with technical and financial support from international partners and, in the second half of 2020, initiated the Emergency Cash Transfer (ECT) programme. The ECT consists of a monthly grant of ZMF 400 (about USD 20) and continues to assist about 204 000 vulnerable households in 2021.

Zambia

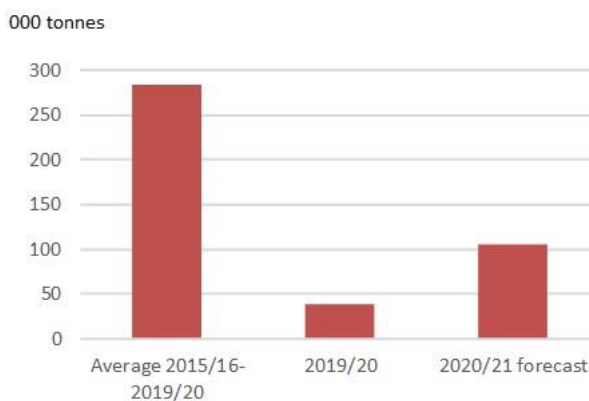
Cereals Imports



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.

Zambia

Cereals Exports

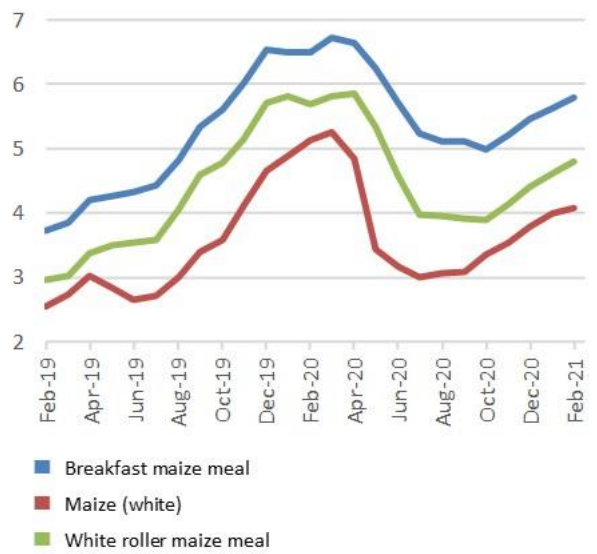


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).
Source: FAO/GIEWS Country Cereal Balance Sheets.

Zambia

Retail prices of maize

Kwacha per kg



Disclaimer: The designations employed and the presentation of material in this information product do not imply the expression of any opinion whatsoever on the part of FAO concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries.

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



GIEWS Country Brief Zambia

Reference Date: 13-November-2020

FOOD SECURITY SNAPSHOT

- Planting of 2021 crops underway amid generally favourable weather conditions
- Bumper cereal harvest estimated in 2020
- Import requirements fall in 2020/21 marketing year
- Prices of maize grain fell sharply between March and October 2020
- Food security aggravated by effects of COVID-19 pandemic

Planting of 2021 cereal crops underway amid favourable weather conditions

Land preparation for, and planting of, the 2021 cereal crops are ongoing and are expected to be finalized by the end of the year. Rainfall amounts in October 2020, which normally marks the start of the rainy season, were average to above average, boosting soil moisture levels and creating favourable conditions for crop germination. The weather outlook for the November 2020-January 2021 period indicates a higher-than-normal probability of above-average cumulative rainfall, which portends to favourable yield prospects for the 2021 cereal crops. A potential risk to cereal production is, however, the infestation of African Migratory Locusts (AML), with outbreaks first reported in Southern and Western provinces earlier in the year. FAO is supporting the Government to contain potential further outbreaks of the AML.

As in previous years, the Government is supporting farmers' access to agricultural inputs, primarily through the Fertilizer Input Subsidy Programme (FISP), which is targeting 1 million smallholders. Although the allocated funds to the FISP for the 2020/21 cropping season have significantly increased compared to the previous year, the effects of the COVID-19 pandemic on Government resources, both through a reduction in public revenues and an increase in unforeseen health expenditures, are likely to constrain the financial support to the agriculture sector in general. The Government has also proposed to remove domestic taxes on tractors in 2020 to encourage the mechanization of the agriculture sector.

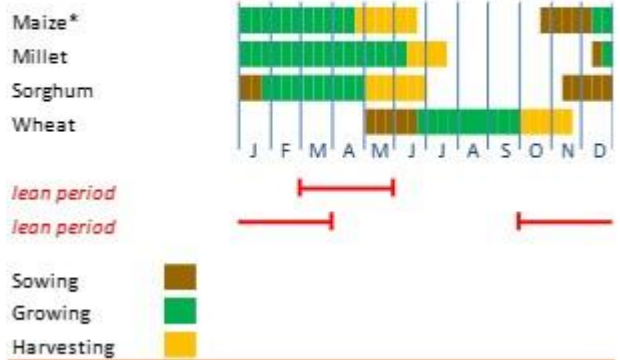
Bumper harvest gathered in 2020

Total cereal production in 2020 was estimated at 3.7 million tonnes, the second largest output on record. Most of this quantity is maize and the harvest was estimated at a well above-average level of 3.4 million tonnes, 66 percent above the reduced outturn

Zambia

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Zambia

Cereal Production

	2015-2019 average	2019	2020 estimate	change 2020/2019
	000 tonnes			percent
Maize	2 725	2 046	3 387	65.6
Wheat	185	152	192	26.3
Rice (paddy)	33	30	35	17.0
Others	47	40	70	75.4
Total	2 990	2 267	3 684	62.5

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

in 2019. The substantial increase in maize production was due to an expansion in the area planted and a recovery in yields, following a mostly favourable rainy season.

Import requirements fall in 2020/21

Import requirements of cereals in the 2020/21 marketing year (May/April) are estimated at a near-average level of 73 000 tonnes, moderately down from the previous year's level. Import requirements of wheat and rice are estimated at 40 000 and 28 000 tonnes, respectively, while only negligible amounts of maize imports are foreseen due to the bumper domestic output this year.

Exports of maize are expected to increase substantially in 2020/21 compared to the previous year, although they are likely to remain below the average level as the country seeks to bolster the national stocks following the drawdowns in the previous two marketing year years. A secondary factor weighing on export prospects in 2020/21 is the large harvests in neighbouring countries that have cut domestic import needs within the subregion. In addition, a large output in South Africa, the main maize exporter in the region, will also limit export opportunities for Zambian grains.

Prices of maize fell sharply between March and October 2020

Since hitting record highs in March 2020, prior to the start of the main harvest period, prices of maize grain declined by about 40 percent between April and October 2020. The decline was mainly driven by the recovery in the 2020 maize production compared to the previous year, leading to large domestic supplies.

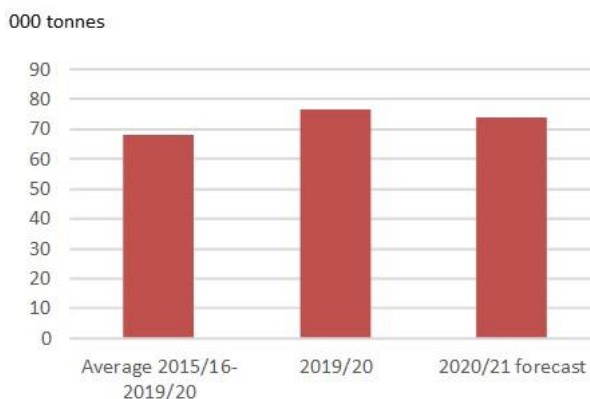
However, the weak national currency is expected to put upward pressure on prices in the coming months, particularly as the dampening effects of the large harvest abates. On a yearly basis, the currency depreciated about 50 percent as of October 2020.

Food security aggravated by effects of COVID-19 pandemic

Prior to the COVID-19 pandemic, about 2.3 million people were estimated to be facing severe acute food insecurity (IPC Phases 3 and 4) in the October 2019-March 2020 period, more than double the number in the corresponding period in 2018/19. Although there have been no nationwide assessments since the outbreak of COVID-19, the pandemic is likely to have caused an overall increase in the number of food insecure people and the prevalence of malnutrition. The primary cause of the aggravation to food insecurity is the loss of incomes and livelihoods, as the slowdown in the global economy reduced export demand for Zambian resources and services, while movement restrictions curbed economic activities. The impact is expected to have been particularly acute in urban areas, where job losses have been more prevalent. Based on preliminary results from a rapid urban food security assessment, carried out by the Government and some partner agencies, an estimated 322 000 people are in need of humanitarian assistance in four urban zones.

Zambia

Cereals Imports

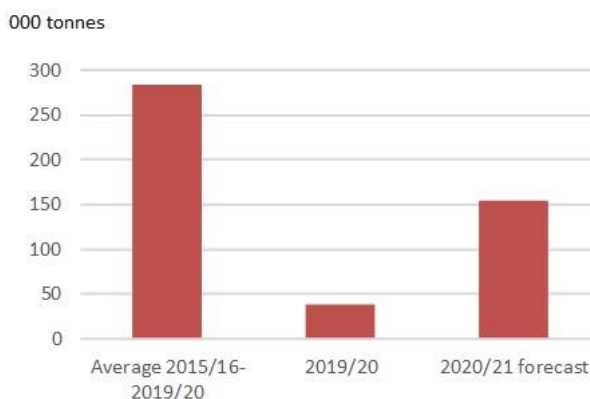


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Zambia

Cereals Exports



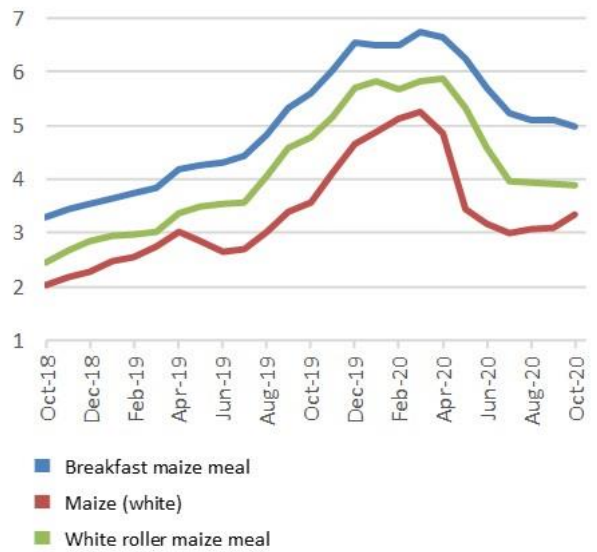
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Zambia

Retail prices of maize

Kwacha per kg



Disclaimer: The designations employed and the presentation of material in this information product do not imply the expression of any opinion whatsoever on the part of FAO concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries.

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



GIEWS Country Brief Zambia

Reference Date: 20-August-2020

FOOD SECURITY SNAPSHOT

- Maize production in 2020 estimated at above-average level, significant recovery compared to reduced level in 2019
- Import requirements in 2020/21 estimated slightly below the average, reflecting larger domestic production
- Prices of maize declined in past months but remain higher year on year
- About 2.3 million people estimated to be food insecure in first quarter of 2020
- The prevalence of food insecurity expected to increase due to the likely effects of COVID-19 pandemic

Production of maize in 2020 estimated at above-average level

Harvesting of the 2020 maize crop, the major cereal grown in the country, concluded in June and production is estimated at a bumper 3.4 million tonnes, the second largest output on record and 65 percent above the reduced level in 2019. The sharp increase reflects both an expansion in the area planted and a recovery in yields compared to the reduced levels in the previous year, reflecting improved growing conditions.

Conducive weather during the planting period, together with remunerative prices, instigated an expansion in maize plantings, which surpassed the five-year average. In addition, average to above-average seasonal rainfall totals across the country aided normal crop development and resulted in higher yields compared to the reduced levels of 2019. The good level of production was achieved despite crop losses in some areas of Southern, Western, Luapula and Northern provinces where heavy downpours caused localized floods and infestations of Fall Armyworm (FAW), which affected about 15 percent of the total area planted with maize, mostly in Southern and Central provinces.

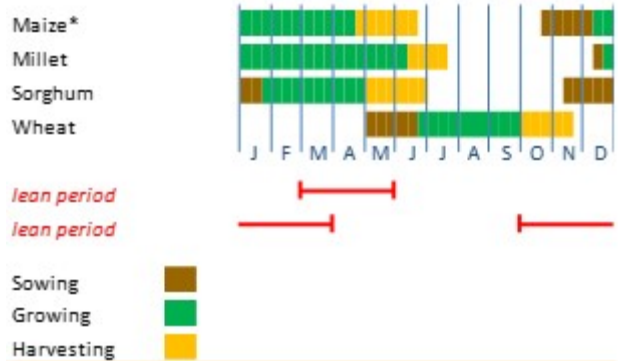
Import requirements in 2020/21 are estimated slightly below the average

Reflecting an improved supply situation due to the production increase in 2020, import requirements of cereals in the 2020/21 marketing year (May/April) are estimated at 67 000 tonnes, about 7 percent below the previous year's level and close to the five-year average. The lower import quantities

Zambia

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Zambia

Cereal Production

	2015-2019 average	2019	2020 forecast	change 2020/2019
	000 tonnes			percent
Maize	2 725	2 046	3 387	65.6
Wheat	185	152	192	26.3
Rice (paddy)	33	30	35	17.0
Others	47	40	70	75.4
Total	2 990	2 267	3 684	62.5

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

reflect ample availabilities of grains from domestic production, which is also expected to result in a build-up of national stocks. Import requirements of wheat are estimated at 35 000 tonnes, slightly below the average, whereas import requirements of rice are estimated at 25 000 tonnes, virtually unchanged on a yearly basis and close to the five-year average. Regarding maize, minimal quantities are forecast to be imported, given a large harvest and these would mainly be through informal channels in border areas.

Prices of maize declined since April but still remain higher year on year

Prices of maize grain and maize products reached record highs in the first quarter of 2020, following steep increases in the second semester of 2019, driven by the reduced harvest in 2019 and consequently tight domestic supplies. Since April 2020, prices of maize have declined seasonally with the 2020 harvest. However, in spite of these recent decreases, as of July, prices of maize grain and products were about 8 percent higher than their year-earlier levels. One prominent factor that has supported the higher prices has been the sharp loss of value of the national currency since March, due to the effects of the COVID-19 pandemic, which has also contributed to pushing up overall inflation rates.

Food security expected to deteriorate due to effects of COVID-19 pandemic

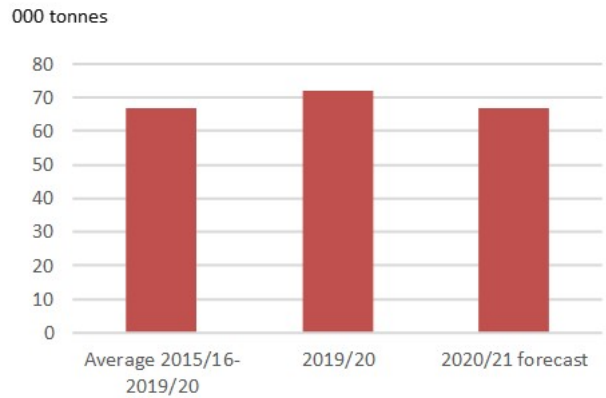
Prior to the COVID-19 pandemic, about 2.3 million people were estimated to be facing severe acute food insecurity (IPC Phases 3 and 4) in the October 2019-March 2020 period, more than double the number in the corresponding period in 2018/19. The higher prevalence of food insecurity was mainly the result of the reduced 2019 cereal harvest and the spike in food prices. Households in southern and western districts were most affected as shortfalls in production were largely concentrated in these areas.

Notwithstanding the recovery in maize production in 2020, the COVID-19 pandemic is expected to result in an increase in the prevalence of malnutrition and food insecurity. Potential breakdowns in food supply chains pose threats to food availability across the country, while a reduction in economic activities and loss of income are expected to curtail households' capacity to access food, and this is likely to be the primary driver of an increase in food insecurity. Preliminary growth forecasts indicate that the economy could contract by as much as 5 percent in 2020. Results from the national food security assessments are not yet available.

Disclaimer: The designations employed and the presentation of material in this information product do not imply the expression of any opinion whatsoever on the part of FAO concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries.

Zambia

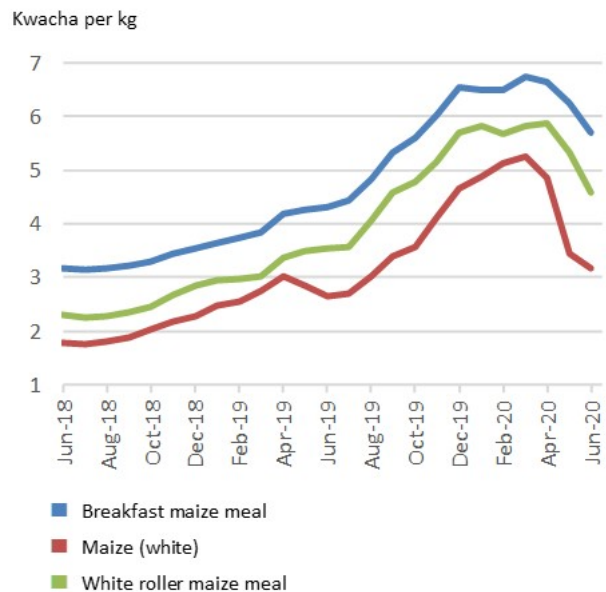
Cereals Imports



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.

Zambia

Retail prices of maize



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



GIEWS Country Brief Zambia

Reference Date: 28-April-2020

FOOD SECURITY SNAPSHOT

- National maize production forecast above average in 2020, but shortfalls expected in southern and western areas
- Cereal imports in 2019/20 estimated slightly above-average due to 2019 reduced harvest
- Prices of maize remained at record highs
- Number of food insecure people more than doubled in 2019/20 compared to previous year and COVID-19 pandemic could aggravate conditions in 2020/21

Production of maize forecast to surpass average in 2020

Harvesting of the 2020 cereal crops started in April and is expected to conclude in July.

Following a delayed start of seasonal rains, precipitation between November 2019 and early April 2020 was generally conducive for normal crop growth. However, in parts of the Southern and Western provinces, rainfall was unevenly distributed in temporal terms, including heavy downpours that caused localized floods and this is expected to curb crop productivity. Localized floods were also reported in Northern and Luapula provinces in early March that are likely to have caused limited damage to standing crops.

It is reported that infestations of Fall Armyworm (FAW) affected about 15 percent of the area planted with maize, mostly in Southern and Central provinces. Although pesticides to treat the affected crops were distributed by the Government, supply shortages were noted in some areas, which could increase crop damage.

Yield prospects are generally positive for the 2020 maize crop, except in the Southern and Western provinces due to the combined impact of FAW infestations and a poor distribution of rains. Nationally, the maize yield is expected to return to a near-average level, following a low level in 2019 caused by rainfall shortages.

Overall, the 2020 maize production is expected at an above-average level of 3 million tonnes, reflecting near-average yields and an increase in plantings. Official production forecasts will be available in May.

Zambia

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Zambia

Cereal Production

	2015-2019 average	2019	2020 forecast	change 2020/2019
	000 tonnes			percent
Maize	2 725	2 046	3 000	46.7
Wheat	185	152	170	11.8
Sorghum	12	7	15	124.4
Others	47	40	50	25.2
Total	2 990	2 267	3 220	42.0

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Import needs rose slightly in 2019/20

Import requirements of cereals in the 2019/20 marketing year (May/April) are estimated at an above-average quantity of approximately 80 000 tonnes, reflecting the tight domestic supply situation following the reduced harvests in 2018 and 2019. A larger increase in import requirements was avoided by the drawdown of existing stocks of maize and wheat.

In consideration of an upturn in the 2020 cereal production, import requirements are foreseen to contract in the 2020/21 marketing year.

Prices of maize at record highs

Prices of maize grain and maize products were at record high levels in March 2020. Prices increased steeply during the second semester of 2019 but slowed at the beginning of 2020 as price control measures, introduced in late 2019, contained the upward pressure from the tight supply situation. Reports from the country indicate relatively steeper price increases for maize products from the informal market, where there is less availability or negligible supplies of subsidized products compared with formal outlets.

Although the expected above-average 2020 maize production is likely to exert downward pressure on prices in the coming months, the sharp depreciation of the country's currency in March and the adverse impact of the COVID-19 pandemic on supply chains could still result in localized price hikes.

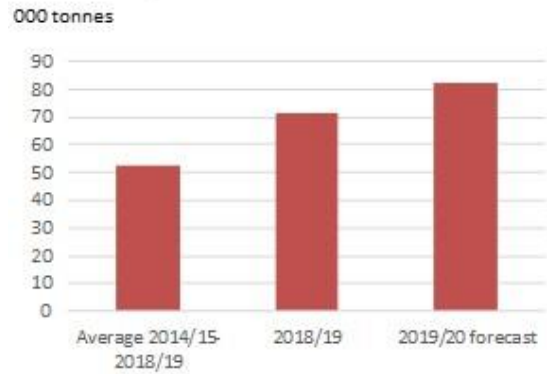
Estimated 2.3 million people food insecure

According to the latest IPC analysis, conducted in June 2019, the total number of people facing severe acute food insecurity (IPC Phases 3 and 4) in the October 2019-March 2020 period was estimated at 2.3 million, more than double the number in the corresponding period in 2018/19. The districts with the highest prevalence of food insecurity were located in the south and west, where households experienced large food consumption gaps due to the impact of shortfalls in the 2019 cereal production and high prices of staple foods.

Notwithstanding the anticipated recovery in maize production, the COVID-19 pandemic could trigger 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 food supply chains represent additional concerns for food security across the country. With the main harvest period underway, travel restrictions due to the pandemic could reduce the ability of farmers to access markets and sell their produce, with a reduction of their incomes and a knock-on effect for local market supplies.

Zambia

Cereals Imports

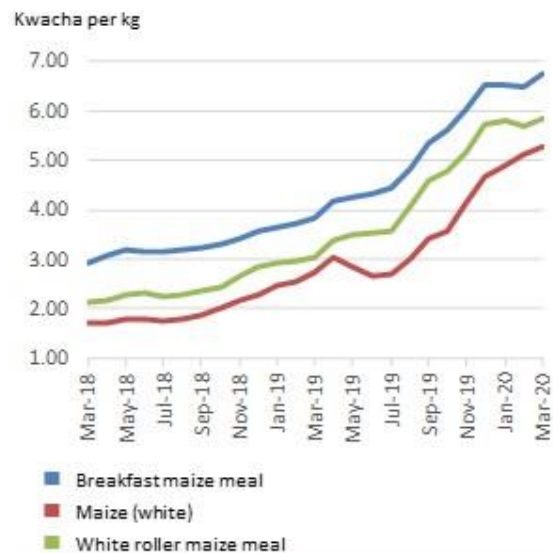


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Zambia

Retail prices of maize



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

COVID 19 and measures adopted by the Government

On 26 March 2020, the Government announced a set of directives to address the outbreak of the COVID-19 virus for an initial two-week period, but this was subsequently extended until 24 April. Regulations included restrictions on public gatherings with more than 50 people and the closure of restaurants and bars. The Government announced some easing of restrictions on 24 April, but adherence to strict sanitary regulations must be followed.

To help tackle the economic impact of the pandemic, the Bank of Zambia has implemented a number of measures to improve liquidity for commercial banks and private sector borrowers, while it is also encouraging the use of digital payments to lessen person-to-person contacts. In addition, the Government is encouraging food stores to explore the option of increasing the procurement of locally produced foods as an alternative to importing products.

Disclaimer: The designations employed and the presentation of material in this information product do not imply the expression of any opinion whatsoever on the part of FAO concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries.



GIEWS Country Brief Zambia

Reference Date: 16-January-2020

FOOD SECURITY SNAPSHOT

- Adequate rains favour 2020 crop conditions in most parts of country
- Cereal production in 2019 declined for second consecutive year to below-average level, driven by rainfall deficits
- Imports in 2019/20 (April/May) expected at above-average level due to reduced harvests
- Prices of maize increased to record highs in 2019, primarily due to reduced domestic supplies
- Estimated 2.3 million people are food insecure in January-March 2020 period, more than double previous year's figure

Adequate rainfall favour 2020 crop conditions in most parts of country

Planting of the 2020 crops finalized in December 2019 and the harvest is expected to start in April. Following a delayed start of seasonal rains, precipitation between November 2019 and the start of January 2020 in the main producing areas has been mostly adequate to facilitate planting operations and support early crop development.

For the January-March 2020 period, seasonal weather forecasts indicate a higher likelihood of average to above-average rainfall across the main producing provinces, including the Eastern and Northern regions. By contrast, weather conditions are expected to be less favourable in Central, Southern and Western provinces, which produce about one-third of the national maize output and where below-average rainfall is likely.

Overall, as of early January, remote sensing vegetation data indicates more favourable crop conditions compared to the previous year, pointing to a potential increase in the 2020 cereal harvest.

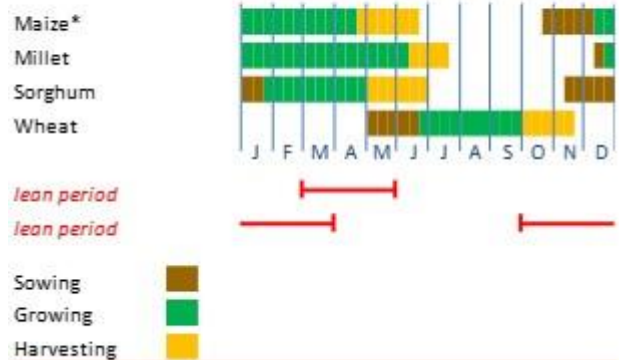
Maize production in 2019 estimated well below average

The 2019 maize crop, the main food staple, was harvested by last June and production is estimated at approximately 2 million tonnes, over 30 percent below the average. The poor harvest was mainly due to significant rainfall deficits in Southern and Western and, to a lesser extent, in Central provinces. Rainfall shortages significantly affected crop yields, while early seasonal dryness caused a contraction in the area sown to maize.

Zambia

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Zambia

Cereal Production

	2014-2018 average	2018	2019 estimate	change 2019/2018
	000 tonnes			percent
Maize	2 992	2 443	2 046	-16.3
Wheat	195	115	150	31.0
Rice (paddy)	37	43	30	-31.3
Others	48	51	40	-20.9
Total	3 272	2 651	2 265	-14.5

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Outputs of other cereals, including wheat, millet, sorghum and rice are also estimated at below-average levels for similar weather-related factors.

Imports of cereals in 2019/20 forecast above average

Imports of cereals in the 2019/20 marketing year (May/April) are forecast at an above-average quantity of 250 000 tonnes, reflecting the impact of the reduced harvests in 2018 and 2019. A higher increase in import requirements has been avoided by the drawdown of existing stocks of maize and wheat.

Following several years of large export volumes of maize, which averaged nearly 400 000 tonnes annually (2015/16-2018/19), exports are forecast to remain at a negligible level in the 2019/20 marketing year (May/April).

Prices of maize increased to record highs in 2019

Retail prices of cereals have increased generally since mid-2018. Following a brief decline during the main harvest period between April and June 2019, retail prices of maize grain and maize meal products rose sharply between July and November 2019. As of November 2019, average prices of maize and maize meal were nearly double than their year-earlier values, standing at record highs. The high levels primarily reflect the impact of reduced domestic supplies and the inflationary effects of a sustained depreciation of the national currency.

Estimated 2.3 million people food insecure

Food security conditions worsened significantly in 2019, particularly in Southern and Western provinces. The main cause of the deterioration has been crop production declines in 2019.

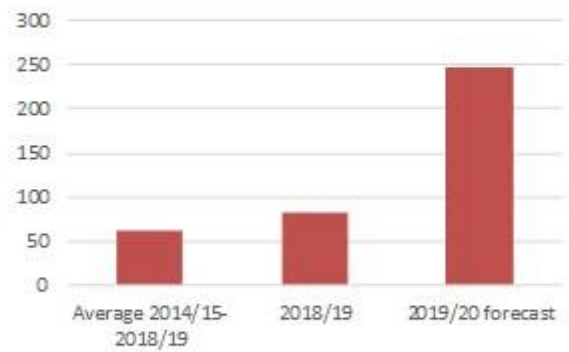
According to the June 2019 IPC analysis, the total number of people facing severe acute food insecurity (IPC Phases 3 and 4) in the October 2019-March 2020 period is estimated at 2.3 million, well above the estimated 954 000 people in the corresponding period in 2018/19. The districts with the highest prevalence of food insecurity are located in the south and west, where households are expected to experience large food consumption gaps and engage in negative coping strategies, such as selling essential livelihood assets.

Disclaimer: The designations employed and the presentation of material in this information product do not imply the expression of any opinion whatsoever on the part of FAO concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries.

Zambia

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.

Zambia

Retail prices of maize

Kwacha per kg



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



GIEWS Country Brief Zambia

Reference Date: 20-September-2019

FOOD SECURITY SNAPSHOT

- Cereal production declined for consecutive year in 2019 to below-average level, driven by rainfall deficits
- Early prospects for 2020 crops, to be planted soon, more favourable
- Domestic supplies in 2019/20 (April/May) tighten on back of reduced harvests, contributing to steep price increases
- Number of food insecure projected to more than double on yearly basis to 2.3 million people

Maize production in 2019 estimated well below average

The 2019 maize crop, the main food staple, was harvested by June and production is estimated at 2 million tonnes, a 50 percent decline compared to the average and about 400 000 tonnes below the 2018 already low harvest. The decrease is mainly driven by significant rainfall deficits in Southern, Western and, to a lesser extent, Central provinces, which combined account for about one-third of the national maize output. Rainfall shortages significantly affected crop yields, while early seasonal dryness instigated a contraction in the area sown to maize.

Outputs of millet, sorghum and rice are also estimated to have decreased to below-average levels for similar weather-related factors. Similarly, production of the winter wheat crop, to be harvested from October, is expected to remain below average, but higher than the previous year when plantings and yields were at below-average levels.

Planting of the 2020 crops, which are likely to be ready for harvest in March next year, is expected to begin in October. Seasonal weather forecasts point to a higher likelihood of average to above-average precipitation amounts during the last quarter of 2019. The favourable weather outlook, combined with the current high cereal prices, is likely to have a positive impact on the extent of the planted area and yields.

Stocks expected to shrink in 2019/20

The well below-average production in 2019 has resulted in a tighter cereal supply situation in the 2019/20 marketing year (May/April), particularly for maize. To compensate for the production shortfall, stocks are expected to be drawn down, while small quantities of imports are foreseen in order to further bolster

Zambia

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Zambia

Cereal Production

	2014-2018 average	2018	2019 estimate	change 2019/2018
	000 tonnes			percent
Maize	2 992	2 443	2 046	-16.3
Wheat	195	115	150	31.0
Rice (paddy)	37	43	35	-18.7
Others	48	51	40	-20.9
Total	3 272	2 651	2 271	-14.3

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

supplies. Opening maize inventories in 2019/20 were estimated at about below-average 500 000 tonnes, down by almost half compared to the previous year.

Following several years of large export volumes of maize, which averaged nearly 400 000 tonnes annually (2015/16-2018/19), exports are forecast to decline to a negligible level in the 2019/20 marketing year (May/April), mostly reflecting the reduced harvest.

Supply pressure triggered steep price rises

Primarily pressured by tighter supplies, the average price of maize grain, despite a short-lived seasonal dip in June, was almost 70 percent higher year on year as of August 2019. Prices of maize meal have also risen steeply since the end of 2018 and, by August 2019, they were between 50 and 80 percent higher on a yearly basis and at new record highs. In addition to the effects of two consecutive poor harvests, the depreciation of the kwacha has added some inflationary pressure.

Reduced harvests worsen food security

Food security conditions have worsened significantly in 2019, particularly in Southern and Western provinces. The main cause of the deterioration has been the steep contraction in the 2019 harvest, which especially affected households that entirely rely on agricultural production for food and income.

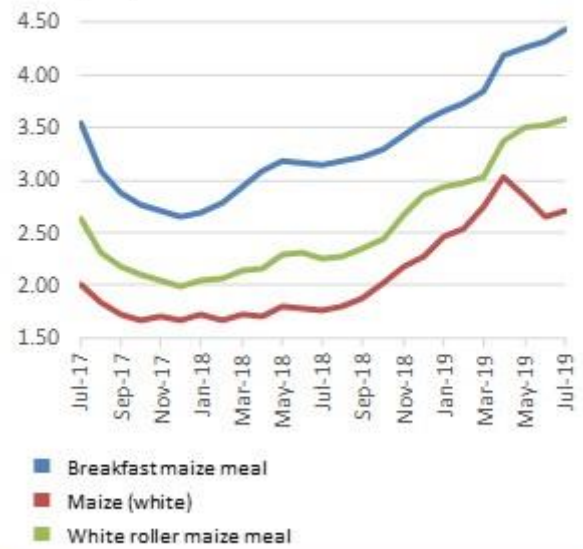
Overall, about 1.7 million people are estimated to face severe acute food insecurity (IPC Phase 3 and Phase 4) in the May-September period, of which about 269 000 people are assessed to be in Phase 4. The total number of food insecure is projected to rise to 2.3 million in the October 2019-March 2020 period and approximately 412 000 people from this number are expected to be in IPC Phase 4: "Emergency". Households in this category are expected to face large food gaps and engage in negative coping strategies, such as selling essential livelihood assets. Widespread improvements in food security conditions are only foreseen to occur from March 2020 onwards, when the main season's harvest period commences.

Disclaimer: The designations employed and the presentation of material in this information product do not imply the expression of any opinion whatsoever on the part of FAO concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries.

Zambia

Retail prices of maize

Kwacha per kg



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



GIEWS Country Brief Zambia

Reference Date: 15-April-2019

FOOD SECURITY SNAPSHOT

- Significant rainfall deficits in Southern and Western provinces have sharply reduced national production prospects for 2019 cereal crop
- Tight domestic supplies expected in 2019/20 marketing year, import requirements forecast to rise
- Supply pressure and weaker currency provoked steep price increases for maize products since late 2018
- Food insecurity expected to worsen in drought-affected southern and western parts of the country

Production of maize in 2019 is forecast at below-average level

Harvesting of the 2019 cereal crops is expected to start in April.

Production of maize, the main food staple, is forecast to decline for a second consecutive year in 2019 and remain at a well below-average level. Most of the expected decrease is associated with foreseen production declines in Southern, Western and, to a lesser extent, Central provinces, which combined account for about one-third of the national maize output.

Seasonal rainfall deficits are the main factor behind the unfavourable production prospects. Large areas of cropped land in southern and western areas exhibited stressed vegetation conditions as of March, inferring a high likelihood of reduced yields this year. In addition, the poor rains at the start of the season are estimated to have caused a contraction in the area planted to a slightly below-average level.

Overall, maize production in 2019 is expected to be between 2 and 2.2 million tonnes. However, results from the government led crop assessment are expected to be released in May and will provide definitive estimates for this year's cereal output.

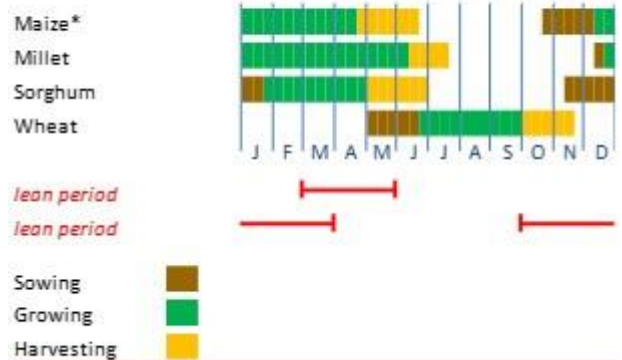
Tight supplies forecast in 2019/20

The expected decrease in the 2019 maize output is forecast to be compensated by a large drawdown in stocks and an increase in imports in the 2019/20 marketing year (May/April). Opening inventories in 2019/20 are forecast at 450 000 tonnes, down by

Zambia

Crop Calendar

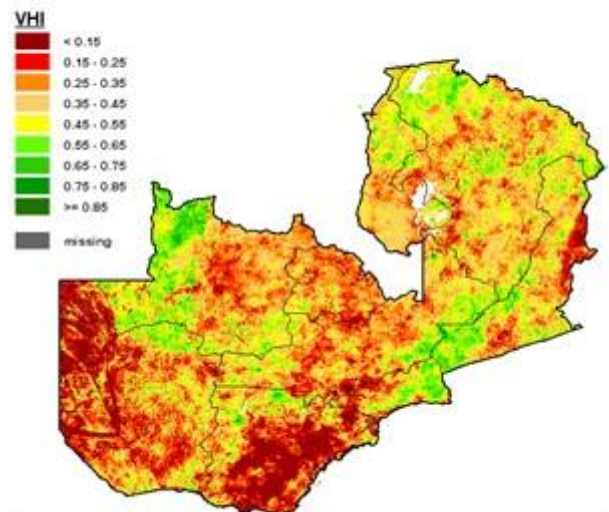
(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Zambia - Vegetation Health Index (VHI)

March 2019



Source: FAO/GIEWS Earth Observation System.

almost half compared to the previous year. Although a drawdown in stocks is anticipated to assist in satisfying the most of the national consumption requirements, an increase in imports is likely to be needed to buffer supplies and maintain adequate stock levels.

Moreover, exports are forecast to decline steeply in 2019/20, although an export ban in 2018 had already curbed the quantity shipped in the current marketing year compared to normal levels.

Maize prices rose sharply on supply pressure

Seasonal price increases of maize have been exacerbated by tighter supplies and have resulted in a 60 percent increase in the average retail price of maize grain in the year to March 2019. Similarly, maize meal products were 30 to 40 percent above their year-earlier levels. Expectations of a reduced harvest as well as a depreciation of the local currency further underpinned the price increases.

Reduced harvest expected to worsen food insecurity

Food security conditions are anticipated to worsen in 2019, particularly in Southern and Western provinces where the anticipated reduced harvests are likely to severely constrain households' food availability. In addition, the current high cereal prices are impeding access to market supplies.

Conditions in 2018 had already deteriorated compared to the previous year on account of the lower cereal output, which pushed an estimated 954 000 people into IPC Phase 3: "Crisis".

Disclaimer: The designations employed and the presentation of material in this information product do not imply the expression of any opinion whatsoever on the part of FAO concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries.

Zambia

Cereal Production

	2013-2017 average	2017	2018 estimate	change 2018/2017
	000 tonnes			percent
Maize	3 017	3 646	2 395	-34.3
Wheat	227	194	115	-40.9
Rice (paddy)	37	38	43	12.1
Others	46	52	48	-6.9
Total	3 327	3 930	2 601	-33.8

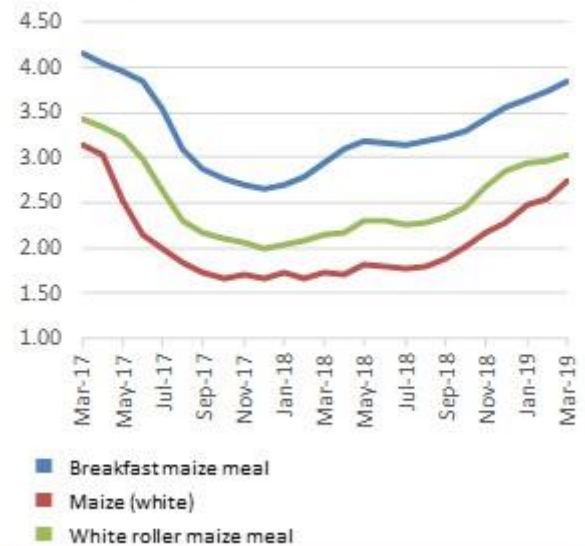
Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Zambia

Retail prices of maize

Kwacha per kg



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



GIEWS Country Brief Zambia

Reference Date: 15-April-2019

FOOD SECURITY SNAPSHOT

- Significant rainfall deficits in Southern and Western provinces have sharply reduced national production prospects for 2019 cereal crop
- Tight domestic supplies expected in 2019/20 marketing year, import requirements forecast to rise
- Supply pressure and weaker currency provoked steep price increases for maize products since late 2018
- Food insecurity expected to worsen in drought-affected southern and western parts of the country

Production of maize in 2019 is forecast at below-average level

Harvesting of the 2019 cereal crops is expected to start in April.

Production of maize, the main food staple, is forecast to decline for a second consecutive year in 2019 and remain at a well below-average level. Most of the expected decrease is associated with foreseen production declines in Southern, Western and, to a lesser extent, Central provinces, which combined account for about one-third of the national maize output.

Seasonal rainfall deficits are the main factor behind the unfavourable production prospects. Large areas of cropped land in southern and western areas exhibited stressed vegetation conditions as of March, inferring a high likelihood of reduced yields this year. In addition, the poor rains at the start of the season are estimated to have caused a contraction in the area planted to a slightly below-average level.

Overall, maize production in 2019 is expected to be between 2 and 2.2 million tonnes. However, results from the government led crop assessment are expected to be released in May and will provide definitive estimates for this year's cereal output.

Tight supplies forecast in 2019/20

The expected decrease in the 2019 maize output is forecast to be compensated by a large drawdown in stocks and an increase in imports in the 2019/20 marketing year (May/April). Opening inventories in 2019/20 are forecast at 450 000 tonnes, down by

Zambia

Crop Calendar

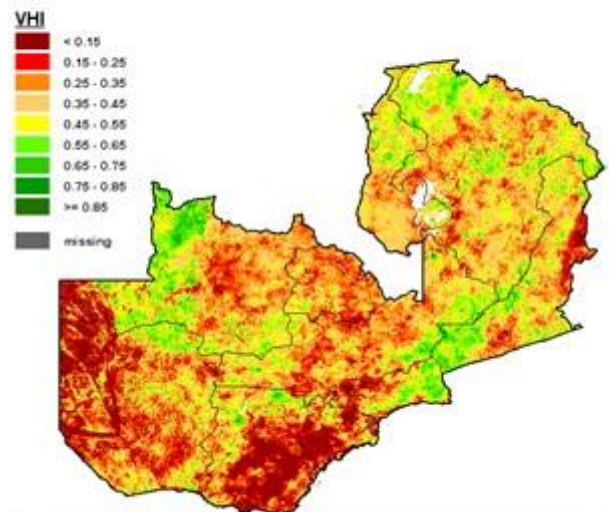
(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Zambia - Vegetation Health Index (VHI)

March 2019



Source: FAO/GIEWS Earth Observation System.

almost half compared to the previous year. Although a drawdown in stocks is anticipated to assist in satisfying the most of the national consumption requirements, an increase in imports is likely to be needed to buffer supplies and maintain adequate stock levels.

Moreover, exports are forecast to decline steeply in 2019/20, although an export ban in 2018 had already curbed the quantity shipped in the current marketing year compared to normal levels.

Maize prices rose sharply on supply pressure

Seasonal price increases of maize have been exacerbated by tighter supplies and have resulted in a 60 percent increase in the average retail price of maize grain in the year to March 2019. Similarly, maize meal products were 30 to 40 percent above their year-earlier levels. Expectations of a reduced harvest as well as a depreciation of the local currency further underpinned the price increases.

Reduced harvest expected to worsen food insecurity

Food security conditions are anticipated to worsen in 2019, particularly in Southern and Western provinces where the anticipated reduced harvests are likely to severely constrain households' food availability. In addition, the current high cereal prices are impeding access to market supplies.

Conditions in 2018 had already deteriorated compared to the previous year on account of the lower cereal output, which pushed an estimated 954 000 people into IPC Phase 3: "Crisis".

Disclaimer: The designations employed and the presentation of material in this information product do not imply the expression of any opinion whatsoever on the part of FAO concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries.

Zambia

Cereal Production

	2013-2017 average	2017	2018 estimate	change 2018/2017
	000 tonnes			percent
Maize	3 017	3 646	2 395	-34.3
Wheat	227	194	115	-40.9
Rice (paddy)	37	38	43	12.1
Others	46	52	48	-6.9
Total	3 327	3 930	2 601	-33.8

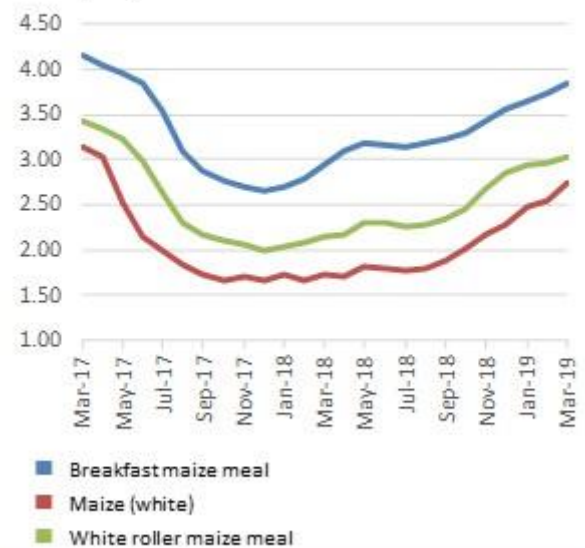
Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Zambia

Retail prices of maize

Kwacha per kg



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



GIEWS Country Brief Zambia

Reference Date: 12-December-2018

FOOD SECURITY SNAPSHOT

- Reduced rainfall during start of 2018/19 cropping season
- Sharp fall in 2018 harvest expected to result in drawdown in national inventories; but domestic supplies still sufficient
- Significant price increases for maize products mostly resulting from supply pressure
- Production shortfalls aggravate food insecurity

Reduced rains at start of 2018/19 cropping season

Planting of the 2019 cereal crops is underway and expected to conclude in early January. Precipitation since the start of the main cropping season (October-July) has been generally below average, resulting in dry conditions especially in southern and western provinces, key cereal-producing areas. These conditions are expected to have had a limited impact on maize plantings and germination as crop water requirements are lower at these stages compared to following vegetative phases. Moreover, weather forecasts point to an increased probability of higher-than-normal rainfall from mid to late December that are anticipated to benefit crop development. Rains are forecast to continue to be mostly average between January and March 2019 across large parts of the country, while lower amounts are expected in southern parts towards the end of the first quarter of 2018.

Although official cereal plantings estimates are not yet available, the higher prices in 2018 and a tighter supply situation are expected to have prompted a year-on-year expansion in the area sown from the reduced level of the previous year. However, the drier conditions and forecasts for reduced rains in southern and western regions could curb the extent of the increase.

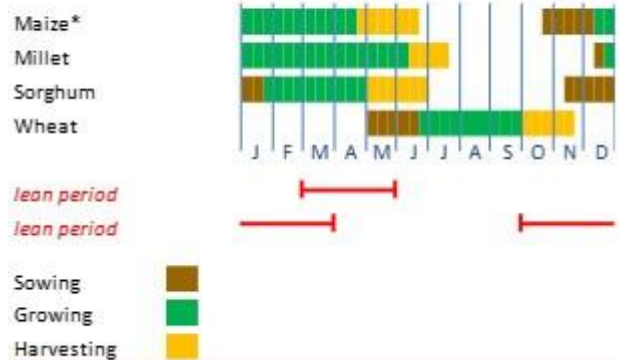
Expected decrease in stocks to compensate for reduced 2018 harvest

On account of a dry spell during a key cropping stage for the maize crop, the output in 2018 is estimated at a well below-average level of 2.4 million tonnes, about 34 percent lower year-on-year. Total 2018 cereal production, including paddy and wheat crops, is estimated at 2.6 million tonnes, a 34 percent decrease from the record high of 2017.

Zambia

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Zambia

Cereal Production

	2013-2017 average	2017	2018 estimate	change 2018/2017
	000 tonnes			percent
Maize	3 017	3 646	2 395	-34.3
Wheat	227	194	115	-40.9
Rice (paddy)	37	38	43	12.1
Others	46	52	48	-6.9
Total	3 327	3 930	2 601	-33.8

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Despite the reduced maize output in 2018, domestic consumption needs in the 2018/19 marketing year (May/April) are expected to be covered by a significant drawdown of inventories, which were built up from the previous year's record high output, plus a small increase in imports, albeit only negligible volumes. The Government implemented temporary export restrictions for maize in October, in an effort to shore-up domestic supplies.

Imports of wheat in the 2018/19 marketing year are forecast to almost double on a yearly basis, reflecting the reduced domestic output obtained in 2018.

Sharp increases in maize prices

Supply pressure, due to the reduced 2018 harvest, has exacerbated seasonal price increases of maize since July and, as of November, the average retail price of maize grain and meal products was approximately 30 percent higher on a yearly basis. An abrupt depreciation of the local currency in recent months added further inflationary pressure that underpinned prices.

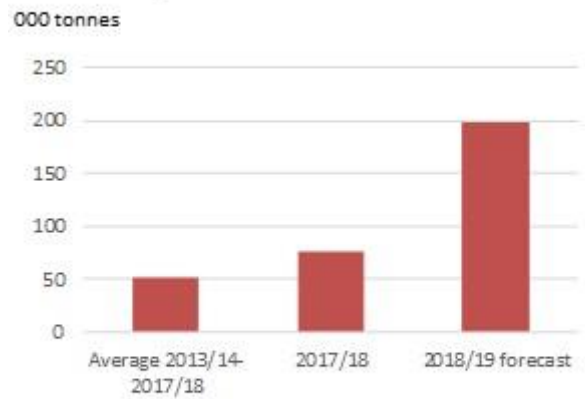
Reduced harvest aggravates food insecurity

The food security situation worsened in 2018 compared to the previous year on account of the reduced crop production. In addition, the recent acute rise in maize prices are expected to adversely impact food access. Approximately 954 000 people are estimated to be in IPC Phase 3 or worse until March 2019, just prior to the main harvest period. This figure is well above the previous year's level of 77 000 people, who were assessed to be food insecure.

Disclaimer: The designations employed and the presentation of material in this information product do not imply the expression of any opinion whatsoever on the part of FAO concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries.

Zambia

Cereals Imports

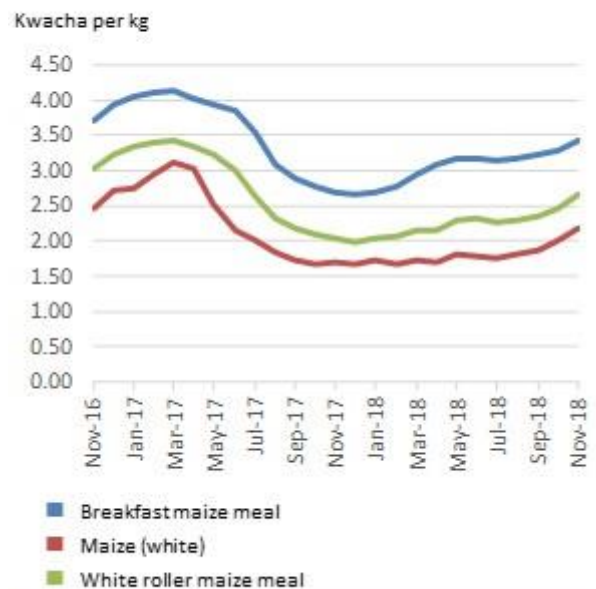


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Zambia

Retail prices of maize



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



GIEWS Country Brief Zambia

Reference Date: 08-May-2018

FOOD SECURITY SNAPSHOT

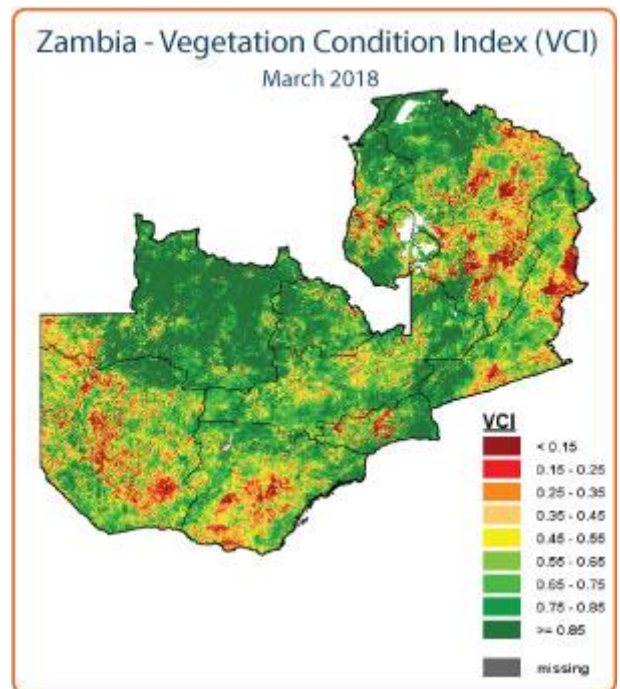
- Production of maize in 2018 forecast at well below average level due to reduced yields and plantings
- Sorghum production also foreseen to decrease, but production of other food crops expected to remain unchanged or rise
- Despite anticipated drop in maize production, national supplies forecast to be sufficient in 2018/19 marketing year (May/April)
- Production shortfalls in southern areas most affected by dry spell expected to aggravate food insecurity

Mid-season dry spell forecast to result in below-average cereal output in 2018

Harvesting of the 2018 cereal crops is underway. Despite a generally favourable start to the 2017/18 rainy season in October and November 2017, a mid-season dry spell in December 2017 and January 2018 affected southern areas, namely Southern, Western and Lusaka provinces, as well as parts of Eastern and Central provinces, causing moisture stress and, in some areas, permanent crop wilting. The dry period has likely caused a reduction in yields, while a contraction in the area sown has also negatively weighed on the production outlook. As a result, maize production in 2018 is forecast at a well below-average (previous five years) 2.4 million tonnes, a decrease by 34 percent on a yearly basis. Most of the decline would originate in the small and medium-scale farming sectors. Production from large-scale maize farmers is anticipated to decline by 50 percent on a yearly basis, although the output from this sector only represents about 5 percent of the total domestic output.

The sorghum output is forecast to remain virtually unchanged, while production of millet is foreseen to decrease by 24 percent, driven by lower plantings. Early projections for the 2018 winter wheat crop, which is currently being planted, points to a 41 percent production fall relative to the previous year, mostly based on expectations of a contraction in the sown area.

Production of beans, groundnuts and rice is, however, forecast to increase in 2018. In addition, larger plantings for tobacco crops are foreseen to drive production upwards.



Supply situation expected stable in 2018/19

Despite a reduced maize output in 2018, supplies are forecast to be sufficient in the 2018/19 marketing year (May/April). This situation reflects the country's large national stocks, following the record 2017 output, which are estimated to be around 0.8 million tonnes. Of this volume, the Food Reserve Agency is estimated to hold 0.6 million tonnes.

Prices of maize down in 2018

Although prices of maize grain have risen since the start of 2018, in April they were still below their year-earlier values, mostly on account of the good supply situation. Similarly, prices of maize meal products were also lower on a yearly basis in April.

The rise in maize prices has contributed to a small uptick in the food inflation rate, estimated at 6.5 percent in April compared to 6 percent in the corresponding month of 2017. An increase in fuel prices in February, supported by higher international oil prices and a weaker currency, also contributed to the higher inflation rate.

Food insecurity expected to intensify in some southern regions

Food insecurity is expected to intensify in southern areas that were most affected by the dry spell. The results from the annual Zambian Vulnerability Assessment Committee's evaluation are expected to be available in June/July and will provide the official estimates on the number of food insecure. In 2017, an estimated 77 000 people required food assistance, well below the 2016 level when about 1 million people were food insecure.

Disclaimer: The designations employed and the presentation of material in this information product do not imply the expression of any opinion whatsoever on the part of FAO concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries.

Zambia

Cereal production

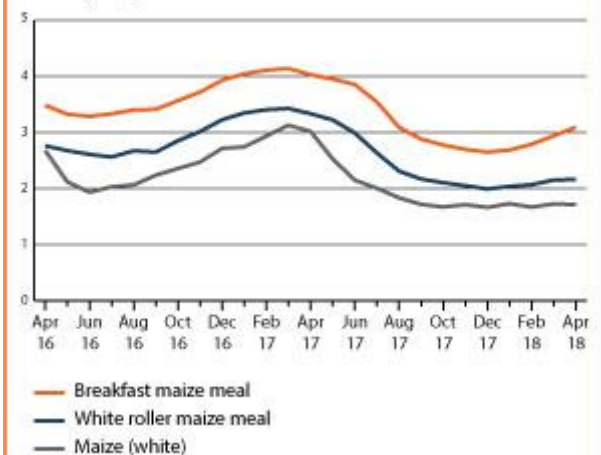
	2013-2017	2017	2018 forecast	change
	average			2018/2017
	000 tonnes			percent
Maize	3 017	3 646	2 395	-34
Wheat	227	194	114	-41
Rice (paddy)	37	38	41	8
Others	46	52	48	-8
Total	3 327	3 930	2 599	-34

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

Zambia

Retail prices of maize

Kwacha per Kg



Source: Central Statistical Office



GIEWS Country Brief Zambia

Reference Date: 01-December-2017

FOOD SECURITY SNAPSHOT

- Preliminary production prospects point to above-average cereal output in 2018
- Production of maize reached record high of 3.7 million tonnes in 2017
- Exports of maize expected to increase in 2017/18, on account of ample domestic supplies
- Following stressed situation in previous year, food security conditions improved in 2017/18, on back of larger agricultural output

Early production outlook favourable for 2018 crops

Land preparation for, and planting of, the 2018 cereal crops is underway and is expected to be completed by early next year. Most of the country has received average to above-average rainfall since the beginning of October, facilitating planting activities and early crop establishment. Forecasts for the remainder of the season, with the cereal harvest expected to begin in the second quarter of 2018, points to a higher probability of average to above-average rains in most areas. However, there is an increased likelihood of below normal rains in the Northern Province, where only small quantities of cereals are produced.

The Government is continuing its Farmer Input Support Programme (FISP), which uses an e-voucher scheme and targets 1 million small-scale farmers to help improve access to fertilizers and seeds. Based on the current weather forecasts and continued favourable access to agricultural inputs, the production outlook points to an above-average output in 2018.

Maize production in 2017 estimated at record high

Maize production in 2017 is estimated at a record high of 3.65 million tonnes, up 27 percent from the previous year. The increase is mainly reflective of beneficial weather conditions, despite a delayed start of seasonal rains, in the main maize-producing Central, Eastern and Southern provinces, which combined, contribute to approximately 60 percent to the national output.

An infestation of the invasive Fall Armyworm, which was first detected in late 2016 and reportedly affected about 22 percent of the cropped land with maize, had initially weighed on production prospects. However, the overall impact of the pest was limited,



Zambia
Cereal production

	2012-2016 average	2016	2017 estimate	change 2017/2016
	000 tonnes			percent
Maize	2,864	2,873	3,646	27
Wheat	239	250	215	-14
Rice (paddy)	38	27	38	41
Others	45	46	52	13
Total	3,186	3,196	3,951	24

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

owing to the wetter weather conditions and control operations by the Government that combined to contain the outbreak.

Overall, the 2017 cereal output is estimated at just under 4 million tonnes, well above the previous five-year average and 24 percent up on an annual basis.

Supply situation improves, increasing export potential and lowering prices

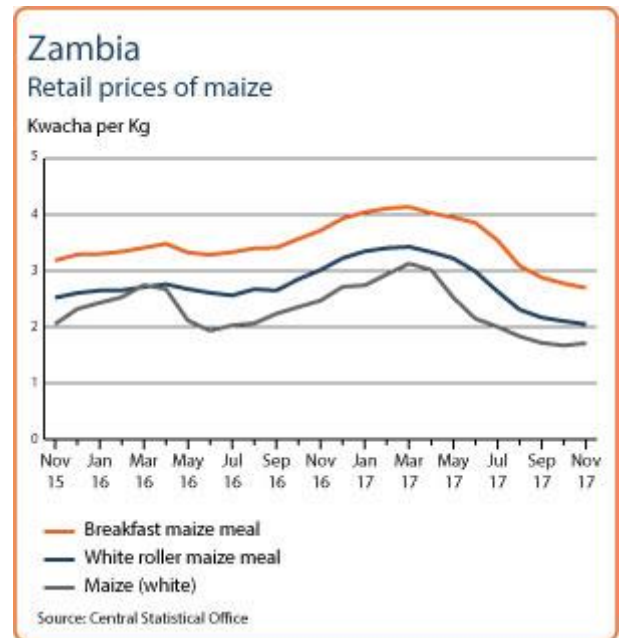
The cereal supply situation in the 2017/18 marketing year (May/April) has improved significantly compared to 2016/17, prompting the Government to reverse the export ban that had been in place earlier in the year. As a result, up to 500 000 tonnes of maize are forecast to be exported this year. However, as neighbouring countries, notably Malawi and Zimbabwe, also registered bumper maize outputs, export destinations may need to be sought outside of the subregion. The Food Reserve Agency (FRA) is also targeting the local purchase of 500 000 tonnes to replenish the national strategic reserves and is offering to buy maize at ZMK 1.2 per kg.

In November 2017, prices of maize meal and grain were almost one-third below their year-earlier value, mostly due to supply pressure.

Number of food insecure declined significantly in 2017/18

Food security conditions have improved significantly this year, mostly owing to the larger agricultural output. However, due to localized floods, pest infestations and droughts, an estimated 77 000 people will still require food assistance in 2017/18, according to the results from the annual *Zambian Vulnerability Assessment Committee's* evaluation. This is a notable improvement compared to the previous year, when almost 976 000 people (about 163 000 households) were estimated to be food insecure and required humanitarian assistance.

Disclaimer: The designations employed and the presentation of material in this information product do not imply the expression of any opinion whatsoever on the part of FAO concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries.





GIEWS Country Brief Zambia

Reference Date: 10-May-2017

FOOD SECURITY SNAPSHOT

- Production of maize expected to exceed 3 million tonnes in 2017
- Cereal supply situation forecast to improve in 2017/18, with increased potential for exports
- Following stressed situation in previous year, food security conditions anticipated to ameliorate in 2017/18 reflecting expected increase in agricultural production

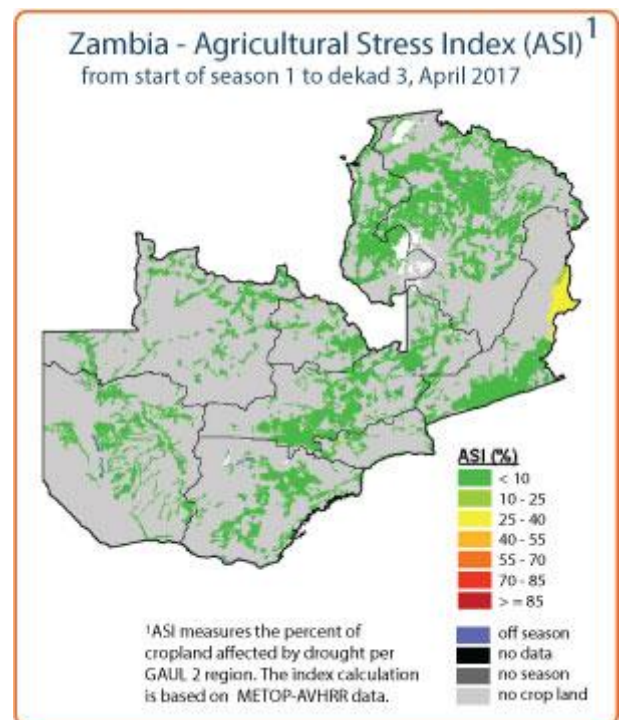
Production of maize in 2017 expected at above-average level

With the cereal harvest underway, maize production is forecast at approximately 3 million tonnes, which would mainly be reflective of beneficial weather conditions. Despite a slightly delayed start of seasonal rains, cumulative precipitation between November 2016 and April 2017 was above-average in the main maize-producing Central, Eastern and Southern provinces, which combined, contribute to approximately 60 percent to the national output. As a result, vegetation conditions in cropped areas, just prior to the harvest period, show an improvement compared to the previous year, indicating a likely increase in yields and the area harvested.

An infestation of the invasive Fall Armyworm, which was first detected in late 2016, reportedly affected just under 200 000 hectares of cropped land. Control operations by the Government contained the outbreak, however, in the infested areas production is expected to be negatively affected, although the impact at the national level is anticipated to be only minimal. Additionally, a red locust outbreak was also reported in more localized areas, but the damage is not expected to be significant.

Supply situation expected to improve, increasing export potential

Following a tighter supply situation in the 2016/17 marketing year (May/April) that prompted the Government to impose an export ban to ensure sufficient domestic availabilities, the supply situation is forecast to improve in 2017/18 on account of an anticipated bumper output. This may result in increased export opportunities. However, as neighbouring countries, notably Malawi and Zimbabwe, are also forecast to harvest bumper maize crops, export destinations may need to be sought outside of the subregion.



Regarding wheat, which is the second most consumed cereal, an import ban, implemented to protect local producers in 2015, was lifted in the first quarter of 2017. The reversal of the ban was intended to boost national supplies and to constrain potential price rises. Production of wheat, which is grown in the winter season and harvested from October, is forecast to rise in 2017, due to a combination of improved water availabilities and a more stable electricity supply (the crop is grown mostly under irrigation conditions), following the replenishment of water levels in the Kariba dam, the country's major hydropower plant.

Food security anticipated to improve in 2017/18

Food security conditions are anticipated to improve in 2017/18, mostly owing to an expected increase in the agricultural output. However, farming households affected by the outbreaks of red locusts and the Fall Armyworm may experience more stressed food security conditions as the pests had likely dampened production. The results of the annual Zambian Vulnerability Assessment Committee's evaluation are expected in June/July and will provide more information on the numbers of food insecure. In the previous year, an estimated 975 738 people (162 623 households) were food insecure and required assistance, mostly supported through the Social Cash Transfer (SCT) programme.

Disclaimer: The designations employed and the presentation of material in this information product do not imply the expression of any opinion whatsoever on the part of FAO concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries.

Zambia				
Cereal production				
	2012-2016 average	2016	2017 forecast	change 2017/2016
	000 tonnes			percent
Maize	2,864	2,873	3,100	8
Wheat	239	250	270	8
Rice (paddy)	39	27	45	67
Others	45	46	52	13
Total	3,187	3,196	3,467	8

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



GIIEWS Country Brief Zambia

Reference Date: 12-January-2017

FOOD SECURITY SNAPSHOT

- Favourable weather forecasts improved production outlook in 2017
- Tighter supplies sustain higher year-on-year maize prices
- Food security conditions remain stressed in southern parts that were most affected by prolonged dryness and poor agricultural production in 2016

Increased chance of above-average rains favours production prospects in 2017

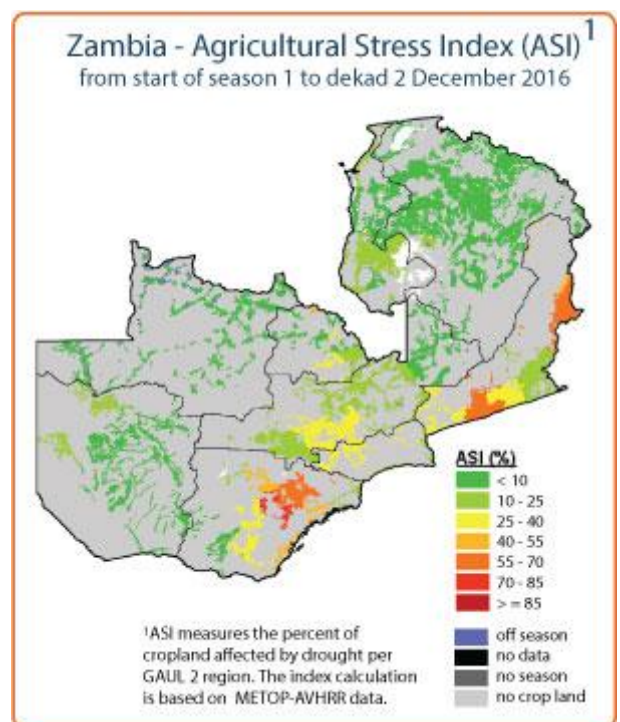
Due to a slightly delayed start of seasonal rains and below-average precipitation between October and December, about two-thirds of the average volume, planting of the 2017 cereal crops is still underway, but expected to be completed in the next weeks. Weather forecasts for the remainder of the 2016/17 main summer cropping season (November-June) indicate an enhanced chance for above-average rainfall conditions. Vegetation conditions in cropped areas are slightly below normal as of late December, reflecting reduced rains since the start of the season; however, the heavier rains at the end of year and expectations of continued normal to above-normal rains are anticipated to improve crop conditions.

Infestations of army worms have been reported in about 124 000 hectares of cropped land; if not treated this could have negative impact on production outcomes in affected areas.

Similar to previous years, the Government is continuing to support farmers' access to inputs through the Farmer Input Support Programme (FISP). This year the Government increased the number of farmers utilizing the electronic voucher system, in efforts to reduced overall administrative costs and improve the efficiency of the Programme. Based on the current conditions, the 2017 agricultural outlook is overall favourable and an above-average maize harvest is expected.

Tighter national supplies, but sufficient to meet domestic requirements

National maize supplies in the 2016/17 marketing year (May/April), including carryover stocks, are adequate to cover domestic requirements. However, to ensure sufficient supplies



until the start of the harvest and ease price pressure due to the heightened export demand from neighbouring countries, the Government revoked all maize export permits except for humanitarian purposes in mid-October; an estimated 160 000 tonnes of maize were exported to Malawi and Zimbabwe for humanitarian use.

The Food Reserve Agency (FRA), the Government parastatal mandated to manage the national strategic stock and engage in market facilitation, targeted the procurement of 0.5 million tonnes of maize in 2016/17. However, by October only about 320 000 tonnes had been purchased and the FRA issued a second tender in November, normally the end of the marketing season is October, to try to secure the additional supplies.

Maize prices rise in response to tighter supplies

Prices of maize grain and maize meal, which have been increasing since July, were up by approximately one-quarter on a yearly basis in October 2016, with meal product prices at record highs. The higher prices mostly reflect the tighter supplies, while a sharp increase in retail fuel prices in mid-October is expected to continue to sustain upward pressure.

Stressed food security situation in southern areas

Food security conditions are stressed in southern areas of the country that were most affected by the El Niño-related dryness and consequent reduced agricultural production. The Zambian Vulnerability Assessment Committee's 2016 evaluation in southern areas of the country estimated that 975 738 people (162 623 households) are food insecure and would require assistance. Between August and December 2016, humanitarian assistance targeted about 258 000 severely-affected people (approximately 43 000 households), while during the peak of the lean season (January-March 2017), the total food insecure population will be supported mainly through the Social Cash Transfer (SCT) programme. Conditions are anticipated to improve with the start of the main season harvest from April onwards.

Zambia

Cereal production

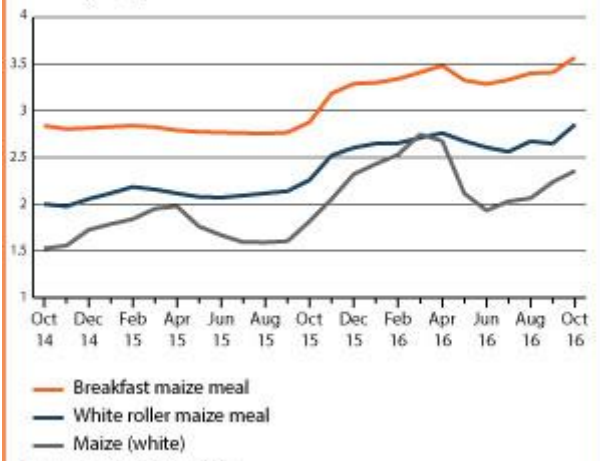
	2011-2015 average	2015	2016 estimate	change 2016/2015
	000 tonnes			percent
Maize	2 894	2 618	2 873	10
Wheat	236	214	250	17
Rice (paddy)	43	26	22	-15
Others	47	48	46	-4
Total	3 220	2 906	3 191	10

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

Zambia

Retail prices of maize

Kwacha per Kg



Source: Central Statistical Office



GIEWS Country Brief Zambia

Reference Date: 09-September-2016

FOOD SECURITY SNAPSHOT

- Production of maize recovers in 2016 due to beneficial weather between January and March, following El Niño-related dryness in late 2015
- Exports of maize expected to commence from October 2016 and forecast at approximately 0.5 million tonnes
- Maize prices rose seasonally and remained above their year-earlier levels
- Food security conditions worsen in southern parts that were most affected by prolonged dryness and poor agricultural production in 2016



Crop production recovers in 2016, following favourable rains in the second half of the cropping season

Harvesting of the 2016 main cereal crops concluded in July. Results from the Government-led crop assessment indicate a 10 percent increase in the 2016 maize crop, estimated at 2.87 million tonnes. At this level, the 2016 output is about the five-year average. The year-on-year increase results from improved yields that more than offset a 9 percent contraction in the area planted. Despite the impact of El Niño-related dryness between October and December 2015, rainfall improved between January and March, benefiting crop development particularly for the late-planted crops. However, the early dryness that especially impacted the southern parts of the country resulted in a sharp drop in maize production of nearly 50 percent in the Southern Province.

Production of sorghum, although produced on a relatively small scale, rose significantly by 74 percent. This year's increase is partly attributed to the inclusion of the crop in the Government's Farmer Input Support Programme (FISP), which provides farmers with subsidized access to agricultural inputs.

The wheat crop, to be harvested from October, is forecast at about 250 000 tonnes, slightly higher than the previous year. Total cereal production in 2016 is forecast at a near-average level of approximately 3.2 million tonnes, 10 percent up from the previous year.

Zambia Cereal production

	2011-2015 average	2015	2016 estimate	change 2016/2015
	000 tonnes			percent
Maize	2 894	2 618	2 873	10
Wheat	236	214	250	17
Rice (paddy)	43	26	22	-15
Others	47	48	46	-4
Total	3 220	2 906	3 191	10

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

Larger maize harvest and ample carryover stocks result in exportable supplies in 2016/17

National maize supplies in the 2016/17 marketing year (May/April), including carryover stocks, estimated to be close to 0.7 million tonnes, are more than sufficient to cover domestic requirements. As a result, Zambia is forecast to export more than 0.5 million tonnes of maize, of which a large proportion is expected to be supplied to Zimbabwe. However, maize exports have been suspended until the end of September.

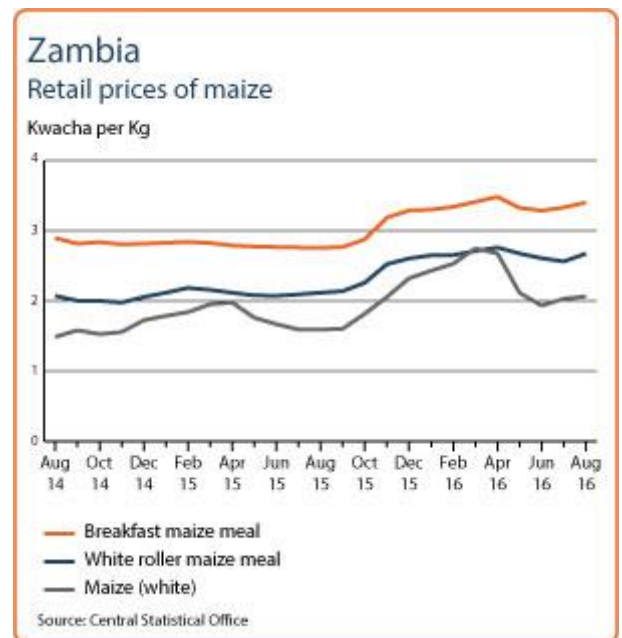
The Food Reserve Agency (FRA), the Government parastatal mandated to manage the national strategic stock and engage in market facilitation, increased the maize procurement price since an earlier announcement in May 2016 by 13 percent to ZMW 85 per 50 kg for the 2016/17 marketing year (May/April). The adjustment was made to better reflect higher maize production costs faced by farmers following the depreciation of the kwacha in 2015, which contributed to raising input prices. In the current marketing year, the FRA has targeted the procurement of 1 million tonnes of maize, the country's main staple food and grown by approximately 80 percent of smallholder farmers. As of the end of August, about 220 000 tonnes had been purchased by the FRA.

Maize prices increased and remained higher on yearly basis

Prices of maize grain increased in August and were about 30 percent up from their year-earlier level, mainly reflecting a tight supply situation.

Food security conditions worsen in southern areas

Food security conditions have deteriorated in the southern areas of the country that were most affected by the El Niño-related dryness and consequent reduced agricultural production. The Zambian Vulnerability Assessment Committee's 2016 evaluation in southern areas of the country estimated that 975 738 people (162 623 households) are food insecure and would require assistance. Between August and December 2016, humanitarian assistance will only target 257 592 severely-affected people (42 932 households), while during the peak of the lean season (January-March 2017), the total food insecure population will be supported mainly through the Social Cash Transfer (SCT) programme.





GIEWS Country Brief Zambia

Reference Date: 25-July-2016

FOOD SECURITY SNAPSHOT

- Production of maize recovers in 2016 due to beneficial weather between January and March, following El Niño-related dryness in late 2015
- Exports of maize expected to commence from October 2016 and forecast at approximately 0.5 million tonnes
- Maize prices declined seasonally, but remain above their year-earlier levels
- Food security conditions worsen in southern parts that were most affected by prolonged dryness and poor agricultural production in 2016

Crop production recovers in 2016, following favourable rains at start of year

Harvesting of the 2016 main cereal crops is expected to conclude in July. Results from the Government-led crop assessment indicate a 10 percent increase in the 2016 maize crop, estimated at 2.87 million tonnes; at this level, the output is fractionally below the five-year average. The year-on-year increase reflects improved yields that more than offset a 9 percent contraction in the area planted. Despite the impact of El Niño-related dryness between October and December 2015, rainfall improved between January and March benefiting crop development particularly for the late-planted crops. However, the early dryness that especially impacted southern parts resulted in a sharp drop in maize production of nearly 50 percent in the Southern Province.

Output of sorghum, although produced on a relatively small scale, increased significantly by 74 percent. The year-on-year production gain for this crop is partly attributed to its inclusion in the Government's Farmer Input Support Programme (FISP), which provides farmers with subsidized access to agricultural inputs.

The wheat crop, to be harvested from October, is forecast at about 250 000 tonnes, slightly higher than the previous year. Total cereal production in 2016 is forecast at a near-average level of approximately 3.2 million tonnes, 10 percent up from the previous year.



Zambia

Cereal production

	2011-2015 average	2015	2016 estimate	change 2016/2015
	000 tonnes			percent
Maize	2 894	2 618	2 873	10
Wheat	236	214	250	17
Rice (paddy)	43	26	22	-15
Others	47	48	46	-4
Total	3 220	2 906	3 191	10

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

Larger maize harvest and ample carryover stocks result in exportable supplies in 2016/17

National maize supplies in the 2016/17 marketing year (May/April), including carryover stocks estimated to be close to 0.7 million tonnes, are more than sufficient to cover the domestic requirements. As a result, Zambia is forecast to export more than 0.5 million tonnes of maize, of which a large proportion is expected to be supplied to Zimbabwe. However, maize exports have been suspended until the end of September.

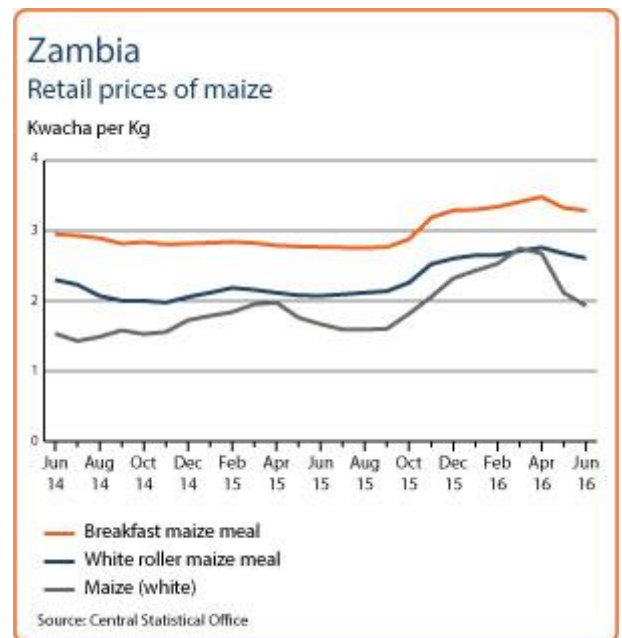
The Food Reserve Agency (FRA), the Government parastatal mandated to manage the national strategic stock and engage in market facilitation, increased the maize procurement price since an earlier announcement in May 2016 by 13 percent to ZMW 85 (USD 0.12) per 50 kg for the 2016/17 marketing year (May/April). The adjustment was made to better reflect higher maize production costs farmers faced following the depreciation of the Kwacha in 2015, which contributed to raising input prices. In the current marketing year, the FRA has targeted the procurement of 1 million tonnes of maize, the country's main staple food and grown by approximately 80 percent of smallholder farmers.

Maize prices declined seasonally, but remain higher on yearly basis

Prices of maize grain declined seasonally between April and June, with the national average price falling by about 28 percent during this period. However, in June 2016 the average grain price was 16 percent above its year-earlier value, with strong regional demand and overall tighter supplies sustaining upward pressure. Maize meal prices began to fall in response to the lower grain prices, but also remain higher than their year earlier levels.

Food security conditions worsen in southern areas

Food security conditions have deteriorated in southern areas of the country that were most affected by the El Niño-related dryness and consequent reduced agricultural production. The Zambian Vulnerability Assessment Committee's 2016 evaluation in southern areas of the country estimated that 975 738 people (162 623 households) are food insecure and will require assistance. Between August and December 2016 humanitarian assistance will only target 257 592 severely-affected people (42 932 households), while during the peak of the lean season (January-March 2017), the total food insecure population will be supported mainly through the Social Cash Transfer (SCT) programme.

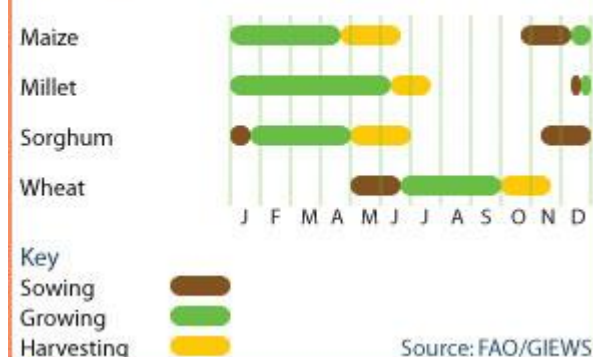


Reference Date: 26-January-2016

FOOD SECURITY SNAPSHOT

- Crop prospects in 2016 weakened by El Niño-related dry conditions, with severely suppressed rains in southern parts
- Between May and October 2015 about 0.5 million tonnes of maize were exported, mostly to Zimbabwe
- Maize prices above their year-earlier levels, following steep increases at the end of 2015
- Overall stable food security conditions, but pockets of food insecurity exist mainly in southern and western areas reflecting lower households' food supplies

Crop calendar Zambia



El Niño-associated dry conditions weaken 2016 crop prospects

Harvesting of the 2016 main cereal crop is expected to begin in April, however, due to the later-than-normal start of seasonal rains, which delayed plantings, the bulk of the harvest is only anticipated to commence in late May. Rains since October have been poorly distributed and below-average, particularly in southern areas, reflecting the influence of the prevailing El Niño episode. This has resulted in overall reduced cereal plantings, with preliminary estimates indicating a decline of up to 20 percent, with steeper contractions in the worst affected Southern and Western provinces. The insufficient rains have also retarded crop development, with many areas exhibiting below-average vegetation growth, notably in southern parts that represent some of the main producing regions. Crop conditions and prospects in the Eastern and Northern provinces are more promising, reflecting generally favourable rains.

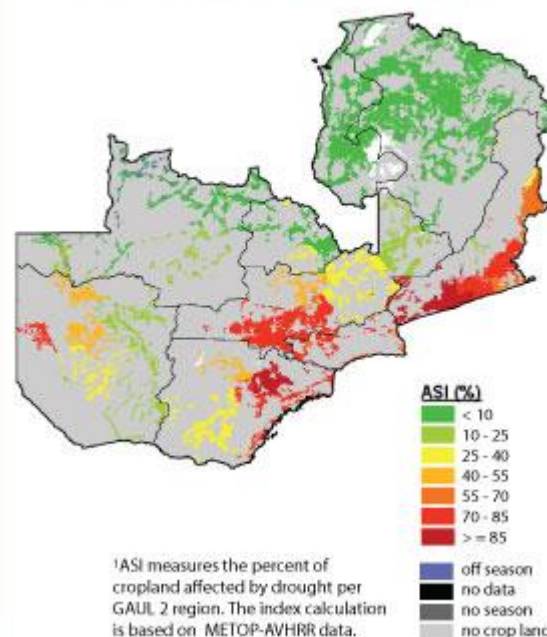
Weather forecasts, which continue to be influenced by the weakening El Niño, point to a higher probability of below-normal rains until April 2016 across large portions of the country, with higher chances of suppressed rains in southern parts.

Although only at the halfway point of the cropping season, production prospects in 2016 have been severely weakened by the persistent drier condition. A Government-led crop assessment, expect to be conducted in March-April, will deliver a more detailed estimate on 2016 plantings, which will provide a better indication on likely harvest outcomes. However, current conditions point to an increasing likelihood of a below-average 2016 maize output.

Large maize volumes exported in 2015/16, while maize imports are expected in 2016/17

National maize supplies in the 2015/16 marketing year (May/April), despite a 21 percent decrease in the 2015 output, were estimated to be more than adequate for domestic consumption requirements. This reflected the record crop of 2014 that reinforced grain stocks and resulted in large carryover supplies into 2015/16, estimated at close to 1 million tonnes. As a result, between May and October 2015 nearly 500 000 tonnes of maize were exported, the bulk of which was shipped to Zimbabwe.

Zambia - Agricultural Stress Index (ASI)¹ from start of season 1 to dekad 2 January 2016



Zambia

Cereal production

	2010-2014	2014	2015	change
	average		estimate	2015/2014
	000 tonnes		percent	
Maize	2 929	3 380	2 682	-21
Wheat	228	202	310	53
Rice (paddy)	48	50	26	-48
Others	53	45	48	7
Total	3 259	3 677	3 066	-17

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

However, on account of the expected below-average 2016 harvest, the Government has announced the creation of an inter-ministerial task force, which is tasked to develop plans to import maize, largely from South America, that will help to stabilize supplies in 2016/17.

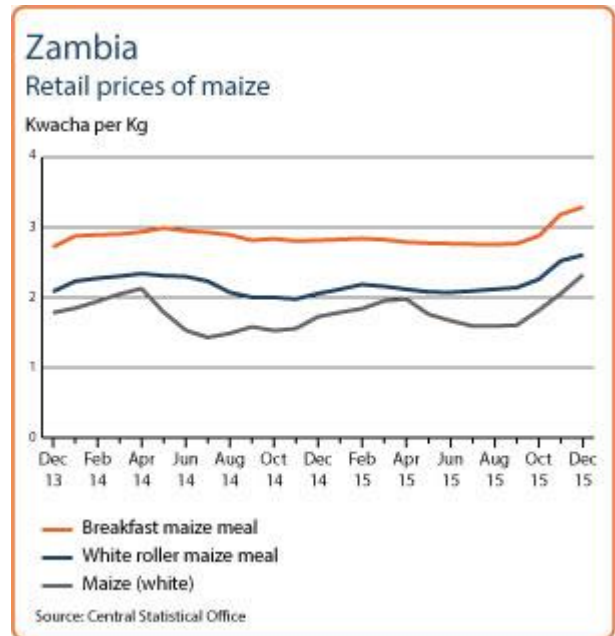
Maize prices increased steeply in last quarter of 2015

The national average maize grain prices in December 2015 were about 50 percent above their year-earlier values, driven higher by the reduced 2015 output and consequent tighter supplies, while strong export demand and the depreciation of the kwacha also provided upward support.

Maize meal prices are also higher, but have not risen as sharply as grain prices. Electricity tariffs increased at the end of 2015, partly to pay for the higher costs of importing power, due to some power outages caused by lower water supplies for hydroelectric plants. This is likely to increase production costs and, therefore, add further upward pressure on maize meal prices and other processed food products. The lower water supplies could also limit irrigation operations.

Pockets of food insecurity in southern and western areas

At the national level, food security conditions are stable; however, there are pockets of food insecurity in localized areas, mainly in Southern and Western provinces that experienced reduced 2015 harvests. Results from the 2015 Vulnerability Assessment Committee's evaluation indicated that just under 800 000 people require food assistance in a total of 31 districts. Food security conditions in 2016/17 could worsen further, if a second successive reduced cereal output transpires in 2016.



Reference Date: 25-November-2015

FOOD SECURITY SNAPSHOT

- El Niño-related dry conditions affect start of 2015/16 cropping season
- Adequate maize supplies despite 21 percent drop in 2015 production
- Maize prices above their year-earlier levels
- Reduced 2015 cereal harvests result in localized food insecurity

Poor start to 2015/16 cropping season

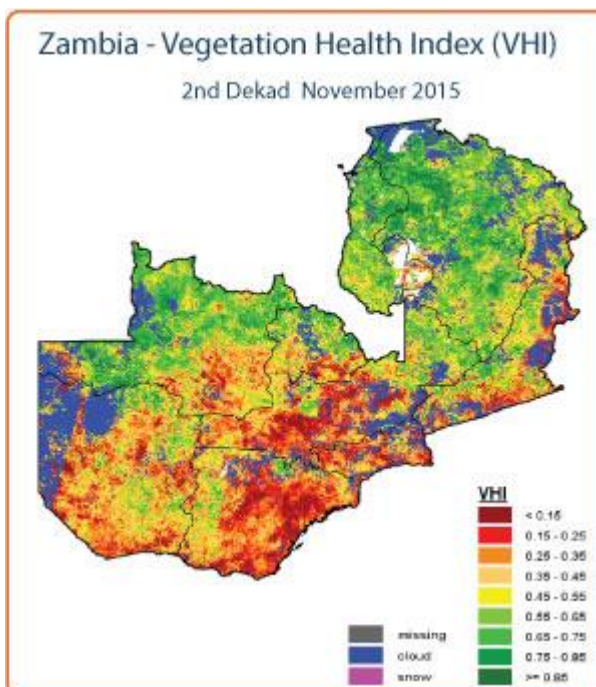
Planting of the 2016 cereal crops is ongoing under generally dry conditions following poorly-distributed and below-average rains since the start of the cropping season in October 2015. Slow vegetation growth was observed in several areas of the country, including the main producing Central and Southern provinces. By contrast, wetter conditions benefited the establishment of the early-planted crops in the two other large producing Northern and Eastern provinces. Although early to infer, weather forecasts influenced by the current El Niño episode point to a higher probability of below-normal rains until March 2016 across southern portions of the country. By contrast, a continuation of favourable rains is more likely in northeastern areas.

The Government's input subsidy programme has continued this year, targeting 1 million farmers, with about one-quarter accessing subsidized inputs through an e-voucher scheme. However, higher input costs, particularly for fertilizers that partly reflect the depreciation of the national currency (Kwacha), is restraining access and pushing up production costs. Although planting estimates will only be available at the start of 2016, the current dry conditions and higher production costs, as well as reported delays in input distributions, could result in some reductions in the planted area to cereals.

Despite reduced 2015 maize output, supplies are satisfactory in 2015/16

The 2015 maize crop, harvested earlier this year and accounting for about 90 percent of the national cereal output, is estimated at 2.7 million tonnes, nearly 21 percent below 2014's level. The decline largely reflected the impact of severe dry spells that caused a reduction in yields. Lower outputs were also estimated for sorghum and rice; however, millet production increased reflecting an expansion in plantings that more than offset lower yields. Harvesting of the mainly irrigated winter wheat crop is nearly complete and is forecast at about 310 000 tonnes, well above the previous year and the five-year average. The expected increase rests on higher yields.

Despite the lower cereal output this year, maize supplies are generally healthy. The record crop of 2014 reinforced grain stocks and resulted in large carryover supplies into the 2015/16 marketing year (May/April) estimated at close to 1 million tonnes. Given the ample stocks, about 290 000 tonnes of maize were exported between May and August 2015. The bulk of which was shipped to Zimbabwe, a pattern expected to continue until the close of the current marketing year in April 2016.



Zambia Cereal production

	2010-2014 average	2014	2015 estimate	change 2015/2014
	000 tonnes		percent	
Maize	2 929	3 380	2 682	-21
Wheat	228	202	310	53
Rice (paddy)	48	50	26	-48
Others	53	45	48	7
Total	3 259	3 677	3 066	-17

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

By the end of October, the Food Reserve Agency (FRA) purchased about 600 000 tonnes of maize from the 2015 harvest, above the initial target of 0.5 million tonnes.

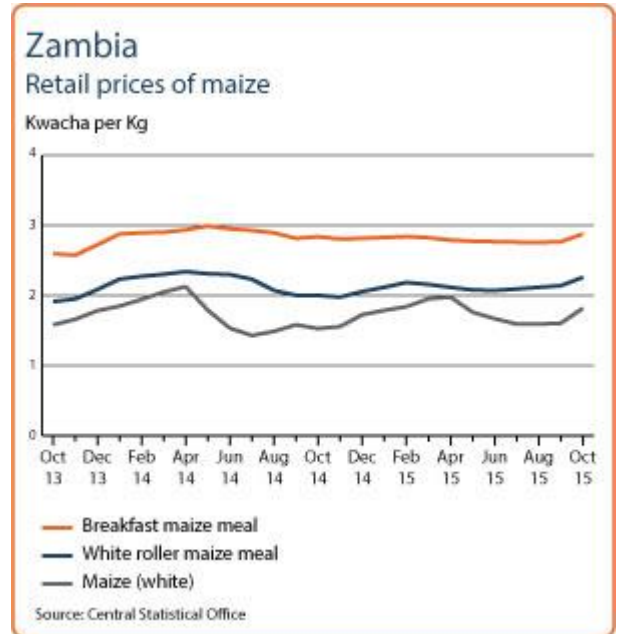
Prices of maize higher than previous year

Despite ample national maize supplies, the reduced 2015 crop put upward pressure on prices and resulted in a 15 percent year-on-year increase in the national average maize grain price in October. These price gains have contributed to recent rises in maize meal prices, which are also trading slightly above their year-earlier levels in October. Moreover, the depreciation of the Kwacha in 2015 has added general inflationary pressure, while also increasing milling production costs, with power rationing resulting in increased use of imported diesel.

The start of FRA seasonal sales, at a reported price of ZMK 85 per 50 kg, slightly below the October retail price, is expected to exert some downward pressure on prices in the coming weeks.

Food security conditions worsened in 2015 reflecting lower maize crop

As a result of the drop in maize production and consequently tighter household supplies, the food security situation worsened in 2015. Results from the 2015 Vulnerability Assessment Committee's evaluation indicate that just under 800 000 people require food assistance in a total of 31 districts, mostly located in the Western and Eastern provinces. At this level, the number of people in need of assistance is more than twice that of 2014. Food assistance provisions commenced in September.



Reference Date: 26-May-2015

FOOD SECURITY SNAPSHOT

- Maize production declined by 21 percent in 2015 as a result of unfavourable weather conditions
- Despite lower production, national stock levels still remain high following record 2014 output
- Food security conditions generally stable, but expected to worsen in some areas on account of lower cereal harvests

Maize production in 2015 estimated at well below last year's record output

Harvesting of the 2015 cereal crops is expected to be finalized in July. Maize production, which accounts for about 90 percent of the cereal output, is estimated to have decreased by 21 percent in 2015 from the record output of the previous year, mainly reflecting erratic rainfall. Dry spells in February and March, during a critical period for maize grain development, resulted in lower yields that more than offset a 5 percent expansion in plantings. Large production declines of over one-third were estimated in the main producing Central and Southern provinces, while a moderate production gain was estimated in North-Western province, on account of generally good rains, preventing further decreases at the national level. Lower outputs were also estimated for sorghum and rice; however, millet production increased reflecting an increase in plantings which outweighed reduced yields. The winter wheat crop, to be harvested from October, is preliminarily forecast to increase from the reduced output of 2014.

Overall, 2015 cereal production stands at just under 3 million tonnes, 19 percent below the record output of 2014 and about 9 percent lower than the average of the previous five years.

Sufficient maize supplies and export availabilities in 2015/16

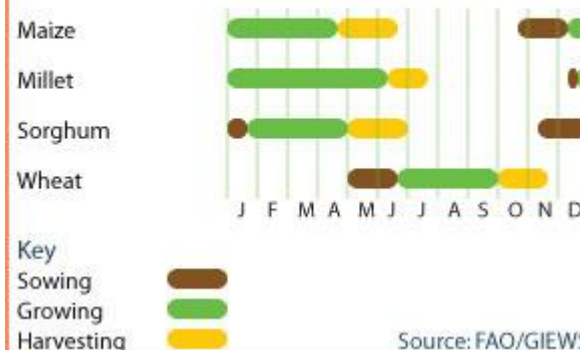
Despite the production decrease in 2015, export availabilities are still estimated at over 800 000 tonnes for the 2015/16 marketing year (May/April), on account of the bumper output in 2014 and consequently large carryover stocks. Export opportunities are expected to increase in 2015/16, following the sharp reduction in South Africa's 2015 maize output, which normally supplies the bulk of the import needs in the subregion, and the forecast increase in import requirements for several countries, reflecting reduced domestic harvests. As in previous years, the Food Reserve Agency (FRA) is planning to procure 500 000 tonnes of maize for the national strategic reserves in 2015/16.

In an effort to stabilize maize meal prices, the Government, through the FRA, sold 150 000 tonnes of maize grain to millers at a subsidized price of ZMW 65 per 50 kg bag. However, the recent increase in fuel prices in May, by up to 15 percent, following several downward revisions earlier this year, may limit the impact on retail prices.

Food security expected to worsen in some areas, reflecting reduced harvests

The food security situation is reported to be generally stable; however, in areas where 2015 cereal production declined sharply, conditions may

Crop calendar Zambia



Zambia

Cereal production

	2010-2014 average	2014	2015 estimate	change 2015/2014
	000 tonnes		percent	
Maize	2 929	3 380	2 682	-21
Wheat	228	202	215	6
Rice (paddy)	48	50	50	0
Others	53	45	42	-7
Total	3 259	3 677	2 989	-19

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

worsen. The 2015/16 national vulnerability assessment is underway. The report, which is scheduled to be released in June, is expected to provide detailed information on the impact of the reduced harvest and possible food assistance needs. In 2014, the Vulnerability Assessment Committee (VAC) estimated that 351 267 people (4 percent of the rural population) required food assistance. This compares with 209 498 vulnerable people in 2013.

Reference Date: 18-May-2015

FOOD SECURITY SNAPSHOT

- **Poor maize production prospects in 2015 due to delayed and below-average rains together with dry spells over most parts of southwestern and eastern parts of the country**
- **Food security conditions are generally stable**

Maize production in 2015 forecast to be significantly lower than last year

Harvesting of the 2015 cereal crops commenced in April. According to initial assessments, the maize harvest is likely to be much lower than last year's bumper crop. Following a delayed start of seasonal rains, up to one month later-than-normal in the main producing Eastern, Southern and Central provinces, rainfall was below average with dry spells over most parts of the southwestern and eastern parts of the country. The maize crop is estimated to drop by more than 13 percent relative to last year's record crop harvest. Rainfall in April was beneficial to pasture regeneration and water tables, however, they were too late to provide relief for late-planted crops which are reaching a permanent wilting point.

Large national stocks in 2014/15

Following the record maize crop in 2014, the Food Reserve Agency (FRA) increased its maize procurement target in 2014 from 500 000 tonnes to about 1 million tonnes. In 2014, total cereal production amounted to about 3.7 million tonnes, some 26 percent higher than average, allowing for FRA to hold more than 1 million tonnes of maize. Given the generally favourable production outcomes in 2014 across Southern Africa and the competitive South African maize prices, there were limited export opportunities for Zambia in 2014/15. However, the forecast sharp reduction in South Africa's 2015 maize production, with lower expected exports, could result in improved export opportunities in the 2015/16 marketing year. However, the extent of the country's engagement in the export market will also largely depend on the final outcome of the 2015 production.

The low wheat production in 2014, which was not sufficient to cover domestic requirements, prompted the Government to approve an import quota of no more than 75 000 tonnes in February, to be imported before August 2015.

Food security conditions stable

The food security situation is reported to be generally stable. The 2014/15 national vulnerability assessment (VAC) estimated that 351 267 people (4 percent of the rural population), up 68 percent from the previous year, required food assistance. Most of these households are located in the western parts, which experienced reduced crop production in 2014. Currently, about 120 000 people in the Western Province are receiving food assistance and no formal request for food assistance has been made from the other districts identified in the VAC, indicating stable conditions.



Zambia Cereal production

	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes			percent
Maize	2 929	3 380	2 900	-14
Wheat	228	202	200	-1
Rice (paddy)	48	50	46	-8
Others	53	45	45	0
Total	3 259	3 677	3 191	-13

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

Reference Date: 05-March-2015

FOOD SECURITY SNAPSHOT

- Maize production prospects for 2015 are satisfactory, following improved rains since December after a delayed start
- Record maize output estimated in 2014, resulting in large national stocks, including a sizeable exportable surplus
- Maize prices continued to rise seasonally, but at subdued rate, reflecting ample supplies
- Food security conditions are generally stable

Production prospects for 2015 maize crop are satisfactory

Harvesting of the 2015 cereal crops is expected to commence from April and crop conditions are overall satisfactory. Following a delayed start of seasonal rains, up to one month later-than-normal in the main producing Eastern, Southern and Central provinces, generally favourable precipitation has been recorded since December 2014, benefiting crop development. Vegetation conditions across most of the country were normal as of February 2015, however, the early seasonal moisture deficits on account of the delayed start of the rains are likely to weigh on yields, which are forecast to decline from their high levels of last year. With the area planted to maize likely to remain similar to that of the previous year and yields forecast to return to near-average levels, the maize crop is expected to decline modestly, but remain above-average.

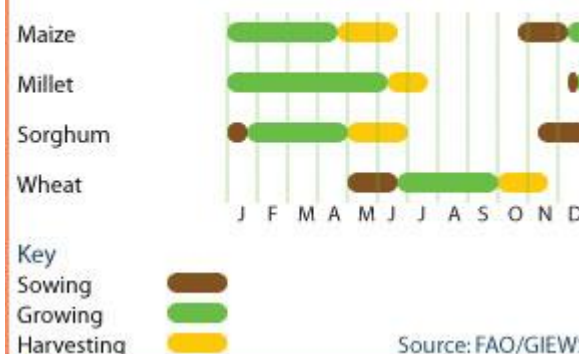
Record maize crop harvested in 2014

Maize production in 2014 was estimated at a record of about 3.4 million tonnes, about 32 percent higher than last year's below-average output, reflecting both higher yields and a larger planted area. Good rains and the continued input support from the Farmer Input Support Programme (FISP), contributed to the increase. For other crops, mixed outputs were estimated for sorghum (-23 percent) and millet (+27 percent) compared to 2013, while a small increase is estimated for rice. The winter wheat crop was estimated at about 200 000 tonnes, 26 percent below 2013's output, reflecting a decline in plantings. Overall, cereal production in 2014 is estimated at 3.7 million tonnes, 26 percent higher than 2013's average output.

Large national stocks in 2014/15

The Food Reserve Agency (FRA) increased its maize procurement target in 2014 from 500 000 tonnes to about 1 million tonnes and is estimated to hold about 1.3 million tonnes of maize. During the current 2014/15 marketing year (May/April), about 113 000 tonnes of maize was exported up until December 2014, of which about one-third was delivered to Zimbabwe. Given the generally favourable production outcomes in 2014 across Southern Africa and the competitive South African maize prices, there were limited export opportunities for Zambia in 2014/15. However, the forecast sharp reduction in South Africa's 2015 maize production, with lower expected exports, could result in improved export opportunities in the 2015/16 marketing year. However, the extent of the country's engagement in the export market will also

Crop calendar Zambia

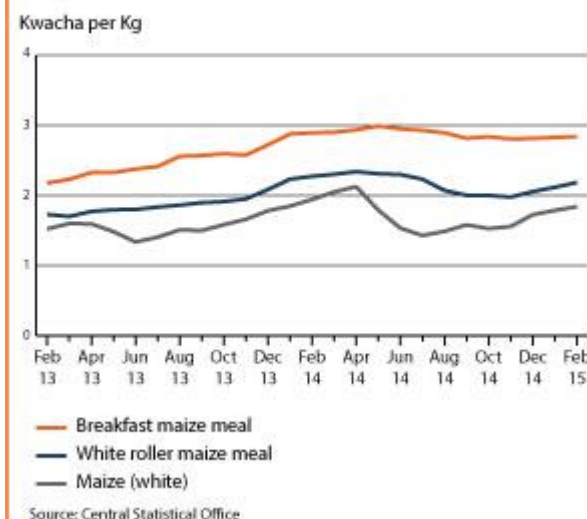


Zambia Cereal production

	2009-2013 average	2013	2014 estimate	change 2014/2013
	000 tonnes		percent	
Maize	2 631	2 568	3 380	32
Wheat	226	274	202	-26
Rice (paddy)	47	45	50	11
Others	59	41	45	10
Total	2 963	2 928	3 677	26

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

Zambia Retail prices of maize



largely depend on 2015 production this year, which is currently expected to be above-average, if good weather conditions persist until the harvest period in April.

The low wheat production in 2014, which was not sufficient to cover domestic requirements, prompted the Government to approve an import quota of no more than 75 000 tonnes in February, to be imported before August 2015.

Maize prices increased seasonally, but remain lower than a year earlier

Maize grain prices continued to increase seasonally in February, but at a generally muted rate, as the buoyant national supplies limited larger gains. The third reduction in fuel prices in January, since November 2014, has also contributed to containing larger price increases. In February, the Government also announced the reduction of the maximum wholesale price for breakfast and roller meal, which have been lowered to ZMW 61 (-6 percent) and ZMW 44 per 25 kg (-15 percent). This intervention is expected to help curb strong increases in retail prices for maize products.

Food security conditions stable

The food security situation is reported to be generally stable. The 2014/15 national vulnerability assessment (VAC) estimated that 351 267 people (4 percent of the rural population), up 68 percent from the previous year, required food assistance. Most of these households are located in the western parts, which experienced reduced crop production in 2014. Currently, about 120 000 people in the Western Province are receiving food assistance and no formal request for food assistance has been made from the other districts identified in the VAC, indicating stable conditions.

Reference Date: 04-November-2014

FOOD SECURITY SNAPSHOT

- Planting of 2015 crops is underway, with generally favourable rainfall forecast for 2014/15 cropping season (October-June)
- The maize output in 2014 was estimated at record 3.35 million tonnes, significantly improving supplies in 2014/15 marketing year
- Maize prices continued to rise in September, following strong declines in the previous month
- Food security conditions remained stable; however, approximately 350 000 people require food assistance as a result of localized food shortages

Favourable rains forecast for 2014/15 cropping season

Planting of the 2015 cereal crops is underway. Despite earlier concerns of an El Niño-affected 2014/15 rainy season (October-March), which is normally associated with drier-than-normal conditions, seasonal forecasts indicate overall favourable precipitation until March 2015. The Government will continue to support input access through the Farmer Input Support Programme (FISP), aiming to further diversify crop production. The recently-released 2015 national budget also indicated the allocation of funds to increase the number of agricultural extension officers by 500 people, expand the area under irrigation and to purchase 500 000 tonnes of maize through the Food Reserve Agency (FRA) for national strategic reserves.

Record maize crop harvested in 2014

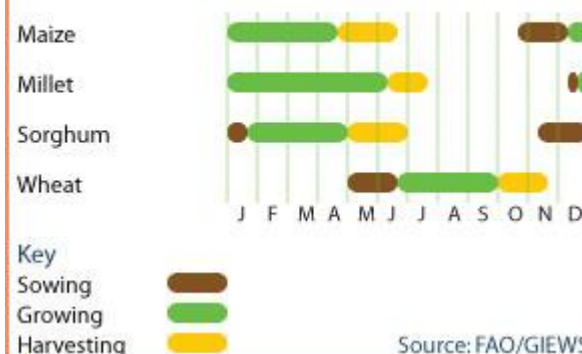
Maize production in 2014 is estimated at a record 3.35 million tonnes, about 30 percent higher than last year's below-average output, reflecting both higher yields and a larger planted area. Good rains and input support from the FISP, which targeted 900 000 beneficiaries, contributed to the increase.

For other crops, mixed outputs were estimated for sorghum (-23 percent) and millet (+27 percent) compared to 2013, while a small increase is estimated for rice. The winter wheat crop, with the harvest expected to be completed in November, is forecast to decrease sharply to just over 200 000 tonnes, reflecting a decline in plantings. Overall, cereal production in 2014 is forecast to increase by 25 percent compared to 2013's near-average output.

Large surplus maize supplies estimated in 2014/15

The Government increased the purchases of maize through the Food Reserve Agency (FRA) from the original target of 500 000 to about 1 million tonnes. Combined with its carryover stock, the FRA is estimated to hold approximately 1.35 million tonnes. Given the ample supplies and export surplus, the Government revoked the export ban earlier this year. However, there are comparatively limited export opportunities in the region, as most countries, including Zimbabwe which imported Zambian maize in the last two years, recorded sizeable production gains in 2014. Furthermore, the comparatively low prices in South Africa are also partly limiting Zambia's competitiveness in the

Crop calendar Zambia

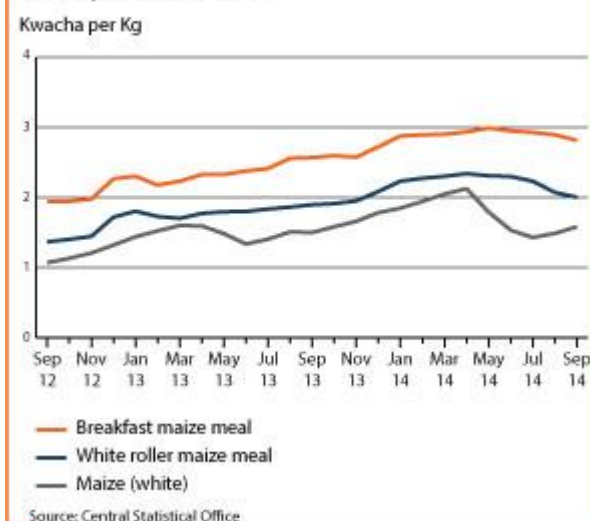


Zambia Cereal production

	2009-2013 average	2013	2014 estimate	change 2014/2013
	000 tonnes		percent	
Maize	2 631	2 568	3 351	30
Wheat	226	274	202	-26
Rice (paddy)	47	45	49	9
Others	59	41	45	10
Total	2 963	2 928	3 647	25

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

Zambia Retail prices of maize



region.

Maize grain prices increased seasonally, but milled prices continued on gradual decline

Maize grain prices increased seasonally in August and September, after sharp declines in preceding months that followed the record 2014 harvest. The national average grain price was about 5 percent above its year earlier level. Prices of milled maize have been more stable this year, but continued their steady declining trend in September and remained between 6 and 10 percent higher than the previous year. The removal of maize and fuel subsidies in 2013, limited stronger losses this year and partly contributed to the slightly higher year-on-year levels.

Food security conditions stable

The 2014/15 national vulnerability assessment estimated that 351 267 people (4 percent of the rural population), up 68 percent from the previous year, require food assistance. Most of these households are located in the western parts, which experienced a dry spell earlier in the year resulting in reduced crop production. However, reports indicate that no formal request for food assistance has been made, except from one district in the Central province, pointing to a continuation of generally stable conditions.

Reference Date: 22-September-2014

FOOD SECURITY SNAPSHOT

- Forecasts point to overall favourable rains for the 2014/15 cropping season (October-June)
- Record maize crop harvested in 2014, significantly improving supplies in the 2014/15 marketing year (May/April)
- Maize prices rise marginally in August, following strong declines in previous month
- Overall, food security conditions stable, however, approximately 350 000 people require food assistance as a result of reduced food production

Favourable rains forecast for the 2014/15 cropping season

Planting of the 2015 cereal crops is expected to commence in October. Despite earlier concerns of an El Niño-affected 2014/15 rainy season (October-March), which is normally associated with drier-than-normal conditions, the latest forecasts released in August indicate overall favourable precipitation.

Record maize crop harvested in 2014

Maize production in 2014 is estimated at a record 3.35 million tonnes, about 30 percent higher than last year's above average output, reflecting both higher yields and a larger planted area. Good rains and continued input support from the Government's Farmer Input Support Programme (FISP), which targeted 900 000 beneficiaries, contributed to the increase.

For other crops, mixed outputs were estimated for sorghum (-23 percent) and millet (+27 percent) compared to 2013, while a small increase is estimated for rice. The winter wheat crop, to be harvested this October, is forecast to decrease sharply to just over 200 000 tonnes, reflecting a decline in plantings. Overall, cereal production in 2014 is forecast to increase by 25 percent compared to 2013's near-average output.

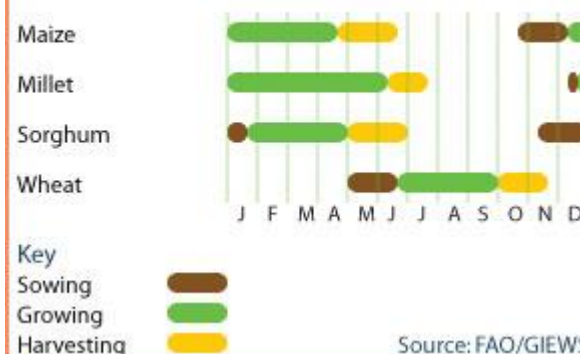
Surplus maize supplies estimated in 2014/15

Following the record harvest, large surplus supplies of maize are estimated for the 2014/15 marketing year (May/April). Deducting national requirements, including that of the strategic grains reserves of about 500 000 tonnes, there is a potential exportable surplus of about 1 million tonnes, which prompted the Government to reverse the maize export ban in May 2014. The main destinations for maize exports are likely to be neighbouring countries, particularly Zimbabwe; however, the generally favourable production levels in the subregion are expected to limit import demand compared to the previous marketing year.

Small seasonal price increases, following sharp declines in previous months

Seasonal price increases for maize grain were observed in August, after sharp declines in the previous months that followed the record 2014 harvest. Prices were still marginally below (-1 percent) their year-

Crop calendar Zambia

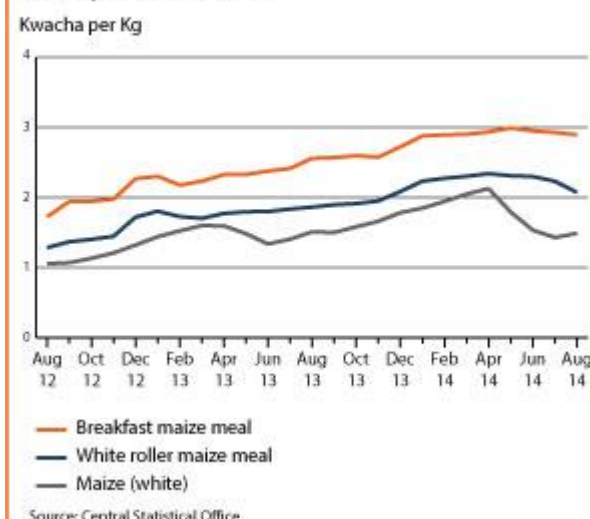


Zambia Cereal production

	2009-2013 average	2013	2014 estimate	change 2014/2013
	000 tonnes		percent	
Maize	2 631	2 568	3 351	30
Wheat	226	274	202	-26
Rice (paddy)	47	45	49	9
Others	59	41	45	10
Total	2 963	2 928	3 647	25

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

Zambia Retail prices of maize



earlier levels mainly attributed to this year's large national supplies. By contrast, maize meal prices, which had remained more stable in previous months, continued their decline in response to lower grain prices. The removal of the maize and fuel subsidies in 2013, however, limited stronger losses.

Food security conditions stable

The 2014/15 national vulnerability assessment estimated that 351 267 people (4 percent of the rural population), up 68 percent from the previous year, require food assistance. Most of these households are located in the western parts, which experienced a dry spell earlier in the year resulting in reduced crop production. The Disaster Management and Mitigation Unit (DMMU) is providing assistance through a number of modalities, including food-for-work as well as direct food distribution, and plans to assist the households through to March 2014.

Reference Date: 15-May-2014

FOOD SECURITY SNAPSHOT

- Record maize crop forecast in 2014
- Improved supply outlook in the 2014/15 marketing year (May/April) with a possible exportable surplus close to 1 million tonnes
- Maize prices are about one-third above last year but remain relatively stable
- Overall, food security conditions expected to improve with new food supplies from the ongoing 2014 harvest

Record maize crop expected in 2014

Harvesting of the 2014 maize crop is well underway and is expected to be concluded in June. A record maize output of approximately 3.35 million tonnes, about 30 percent higher than last year's above average harvest, is forecast by the Ministry of Agriculture and Livestock, due to both improved yields and an expansion in area planted. Seasonal rains generally started in November/December 2013, with some delays in southeastern parts that prompted some farmers to plant early maturing maize varieties. However, good rains followed in the successive months with sufficient moisture levels throughout the growing season (December-April). Some moisture deficits in southwestern parts, following a short, dry period in January, led to some crop wilting with possible lower yields.

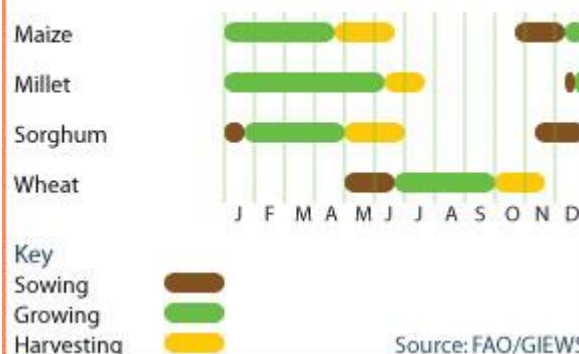
The continued support from the Government to improve the use of inputs through the Farmer Input Support Programme (FISP), which targeted 900 000 beneficiaries, further contributed to the favourable output.

For other crops, mixed outputs were estimated for sorghum (-23 percent) and millet (+27 percent) relative to last year, while a small increase is estimated for rice. The winter wheat crop, to be harvested this October, is provisionally projected to decline sharply to just over 200 000 tonnes, given an estimated contraction in plantings. For cash crops, tobacco production is expected to increase by nearly 20 percent, while a decrease in cotton production is foreseen.

Sufficient maize supplies in 2014/15 to cover domestic requirements and enhance exports

The expected record maize output this year has improved the supply outlook for the 2014/15 marketing year (May/April). With consumption requirements estimated at about 1.4 million tonnes, the production forecast is well above the national needs. Deducting the total national requirements, including that of the strategic grains reserves of about 500 000 tonnes, there is a potential exportable surplus of about 1 million tonnes. Consequently the Government reversed the maize export ban in May 2014. It is likely that most exports will be traded with neighbouring countries, particularly Zimbabwe; however, the overall favourable production forecasts in the subregion will limit import demand compared to the previous marketing year when national supplies were generally tighter. Despite the larger rice harvest, the national requirements will still need to be satisfied with a small quantity of imports, estimated between 15 000 and 20 000 tonnes. In regards to

Crop calendar Zambia

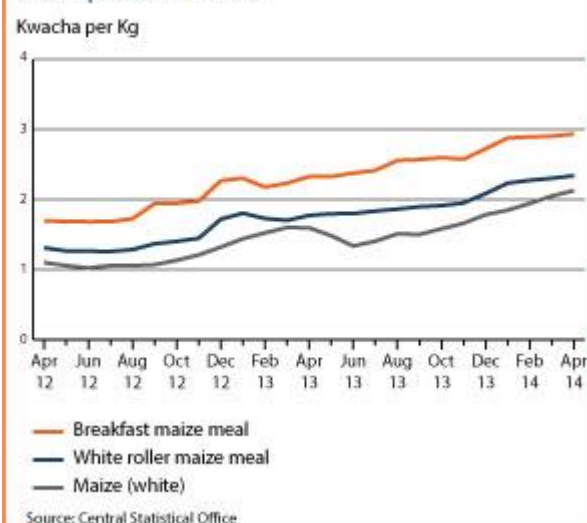


Zambia Cereal production

	2009-2013 average	2013	2014 estimate	change 2014/2013
	000 tonnes		percent	
Maize	2 631	2 568	3 351	30
Wheat	226	274	202	-26
Rice (paddy)	47	45	49	9
Others	59	41	45	10
Total	2 963	2 928	3 647	25

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

Zambia Retail prices of maize



wheat, if the projection for the 2014 crop of 202 000 tonnes is realized, both a draw-down in stocks and a small volume of imports (to maintain adequate stock levels) would be required to meet the annual domestic demand, estimated at about 250 000 tonnes.

Maize meal prices remain above last year's levels

Price of maize meal increased marginally since January 2014, while larger price gains were observed for maize grain as supplies tightened before the start of the main harvest in May. In April, prices of maize meal were about one-third above their year-earlier levels. Tighter national supplies, on account of the reduced 2013 harvest and strong regional demand, in addition to the removal of government subsidies for maize and fuel, contributed to elevated levels. Improved domestic production this year is expected to exert downward pressure on prices in the coming weeks. However, the recent upward revision to fuel prices, prompted by the continuing depreciation of the national currency (Kwacha), may limit the declines, particularly for more remote markets.

Food security conditions expected to improve

The current high maize prices are negatively impacting on households' access, particularly for vulnerable groups. However, the projected increase in national maize supplies is expected to lower prices improving urban and market-dependent households' access, in particular. Details on household food security situation together with any assistance needs would be made available once the National Vulnerability Assessment is carried out in the next few months.

Reference Date: 15-January-2014

FOOD SECURITY SNAPSHOT

- Good rains received in key maize growing regions of the west, but some water deficits observed in the eastern producing zones during the first quarter of the 2013/14 cropping season
- Maize supplies sufficient for domestic requirements in the 2013/14 marketing year, but exportable surplus reduced following a lower 2013 harvest
- Maize prices up to one third above their levels of a year earlier, supported by lower national production
- Food security situation remains stable

Mixed rains received so far, but overall production outlook remains favourable

Planting of the 2014 maize crop was completed at the end of 2013. Rains in the key maize growing Southern, Central and Western provinces have been mixed since the beginning of the rainy season in October; above average rains were recorded in western parts, while cumulative precipitation in eastern areas has been below average. However, crops are only at the vegetative stage and therefore the early seasonal rainfall deficits are expected to have only a limited impact on crop performance, particularly if favourable rains are received in the coming weeks.

The government allocated ZMK 500 million to the Farmer Input Support Programme (FISP), targeting 900 000 beneficiaries, as in the previous season, to help improve small-scale farmers' access to inputs. However, the fertilizer subsidy rate this year has been reduced from 75 percent to 50 percent. The 2014 budget also included increased investment to rehabilitate feeder roads in rural areas, to help facilitate improved trade of agricultural inputs and outputs.

Sufficient cereal supplies, but lower exportable surplus

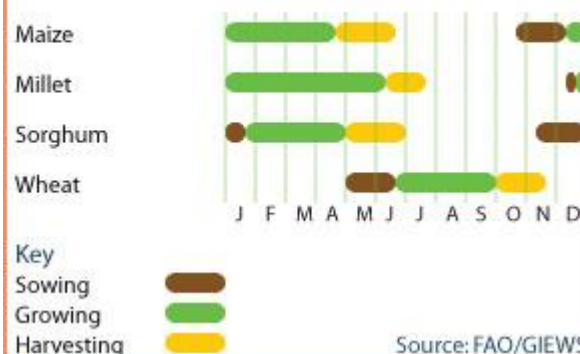
Maize production in 2013 was estimated at about 2.6 million tonnes, 11 percent below the bumper output of 2012. Despite this reduction, maize supplies for the 2013/14 marketing year (May/April) are estimated to still be sufficient to cover domestic requirements, as well as providing a limited exportable surplus. However, given the reduced national supply, the government introduced trade restrictions, authorizing only government-to-government trade agreements and exports by the WFP.

The Food Reserve Agency (FRA) purchased approximately 426 000 tonnes of maize for the national strategic reserves in 2013 (below the target of 500 000 tonnes), at a cost of ZMK 65 per 50 kg (or ZMK 1.3 per kg), while 2 100 tonnes of paddy rice was also purchased (ZMK 1.5 per kg).

Prices of maize meal strengthened further

Maize meal prices strengthened further at the end of 2013, supported by the removal of maize and fuel subsidies, and reduced national supplies. By December prices were about one fifth higher than their

Crop calendar Zambia

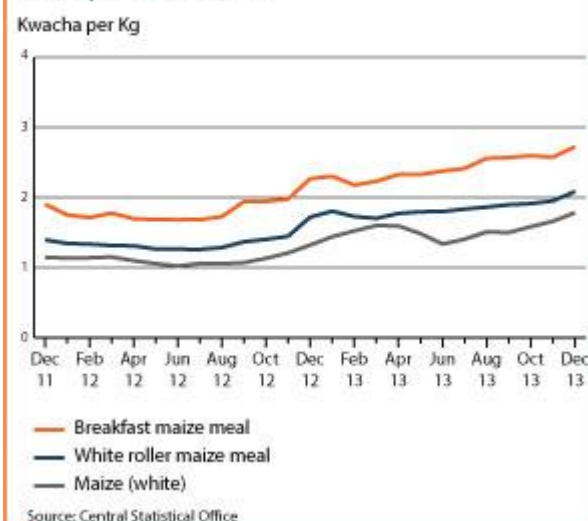


Zambia Cereal production

	2008-2012 average	2012	2013 estimate	change 2013/2012
	000 tonnes		percent	
Maize	2 407	2 883	2 568	-11
Wheat	209	254	274	8
Rice (paddy)	44	45	45	0
Others	61	45	41	-9
Total	2 720	3 227	2 928	-9

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

Zambia Retail prices of maize



year earlier levels. To temper price increases and ease potential supply constraints, the government began to sell limited volumes of maize from the strategic grain reserves at the end of 2013. The maize will be sold at ZMK 1 700 per tonne to millers. Grain prices have shown slightly stronger increases during the last quarter of 2013, compared to those of maize meal, and increased by 35 percent on an annual basis.

Food security conditions stable

Overall, food security conditions are stable. However, the higher maize prices are expected to negatively impact household' access.

Government assistance is being provided an estimated 209 000 households that were assessed to be at risk of food insecurity, mostly located in the Southern province, according to the 2013 vulnerability assessment.

Reference Date: 25-November-2013

FOOD SECURITY SNAPSHOT

- Planting of the 2014 crops is underway, with overall favourable rains forecast for the 2013/14 cropping season (October-July)
- Maize production in 2013 estimated at an above average 2.6 million tonnes
- Maize supplies sufficient for domestic requirements in the 2013/14 marketing year, but exportable surplus reduced
- Food security situation remains favourable

Planting of the 2014 crop underway

Planting activities for the 2014 crop commenced in November. Although good rains were received in western areas, the main maize growing regions in the east and south have recorded only sporadic precipitation, which is likely to have delayed planting activities. Forecasts for the 2013/14 rainy season (October-March) however, indicate that the country will receive average to above average rains.

The government has allocated ZMK 500 million to the Farmer Input Support Programme (FISP), targeting 900 000 beneficiaries, as in the previous year, to help improve small-scale farmers' access to inputs. However, the fertilizer subsidy rate this year has been reduced from 75 percent to 50 percent. The 2014 budget also includes increased investment to rehabilitate feeder roads in rural areas. The investment in rural infrastructure aims to facilitate improved trade of agricultural inputs and outputs.

Maize production in 2013 remains above average, but below previous year's output

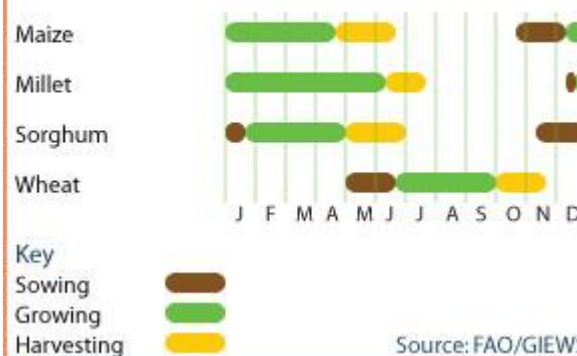
Maize production in 2013 is estimated at 2.6 million tonnes, 11 percent lower than last year but above the short-term average. Production of rice, sorghum and millet are also estimated to be lower than 2012, due to reduced yields; however, increased plantings for rice helped off-set a larger reduction. In regard to cash crops, the lower prices of cotton last year contributed to a contraction in plantings and production consequently fell by about 50 percent to 140 000 tonnes. By contrast, soybean production increased significantly by 30 percent.

Sufficient cereal supplies, but lower exportable surplus

National maize supplies for the 2013/14 marketing year (May/April) are estimated to be more than sufficient to cover domestic requirements. The Food Reserve Agency (FRA) completed its public procurement programme, purchasing approximately 426 000 tonnes for the national strategic reserves (below the target of 500 000 tonnes), at a cost of ZMK 65 per 50 kg (or ZMK 1.3 per kg), while 2 100 tonnes of paddy rice was also purchased (ZMK 1.5 per kg).

Given the lower the production in 2013, the government introduced trade restrictions to control supplies, authorizing only government-to-government trade agreements and exports by the WFP. Between May and September only about 75 000 tonnes of maize has been exported, roughly one-third of the quantity of the previous year.

Crop calendar Zambia

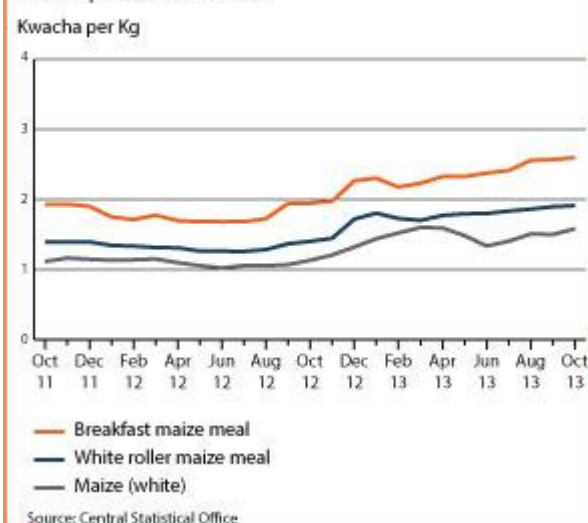


Zambia Cereal production

	2008-2012 average	2012	2013 estimate	change 2013/2012
	000 tonnes		percent	
Maize	2 407	2 883	2 568	-11
Wheat	209	254	274	8
Rice (paddy)	44	45	45	0
Others	61	45	41	-9
Total	2 720	3 227	2 928	-9

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

Zambia Retail prices of maize



The country is self sufficient in all cereals, except rice and is expected to import approximately 20 000 tonnes to cover the national deficit.

Maize meal prices continue to increase

Maize meal prices continued their steady rise since the first quarter of 2013 and in October exceeded the previous year's level by more than a third. Similarly, maize grain prices are equally high, but experienced a temporary decline in the post-harvest period between April and June. The reduction in the 2013 harvest underpinned the higher prices, while the removal of the maize and fuel subsidies added further support. The purchase of maize by the FRA also increased upward price pressure. However, unlike 2012, exports are significantly reduced this year, following the implementation of trade restrictions, which has helped to maintain stable domestic supplies and lessen pressure on prices.

Food security conditions stable

Overall, food security conditions are stable, reflecting adequate national supplies from the 2013 harvest. However, higher maize meal prices are expected to have negatively affected household' access, while erratic rains resulted in crop losses in southern areas, particularly in the Southern Province. An estimated 209 000 were assessed to be at risk of food insecurity, mostly located in the Southern province, according to the 2013 vulnerability assessment report. Government assistance is being provided to affected households up until March 2013.

Reference Date: 03-June-2013

FOOD SECURITY SNAPSHOT

- Maize production in 2013 forecast at an above average 2.6 million tonnes
- Maize supplies sufficient for domestic requirements in the 2013/14 marketing year, but exportable surplus expected to decrease
- Food security situation remains favourable

Maize production declines in 2013, but remains above average

Harvesting of the main 2012/13 season's cereal crops is nearing completion. Relatively normal rainfall patterns were recorded between November and April in most of the country. However, in southwestern areas, rains were below average between February and April. The water deficits that developed corresponded with the critical seed formation stage, adversely affecting yields in some locations. An outbreak of army worms in 2012 also contributed to some crop losses, although seeds and fertilisers were distributed, following the infestation, to enable farmers to replant damaged crops, partly mitigating the impact.

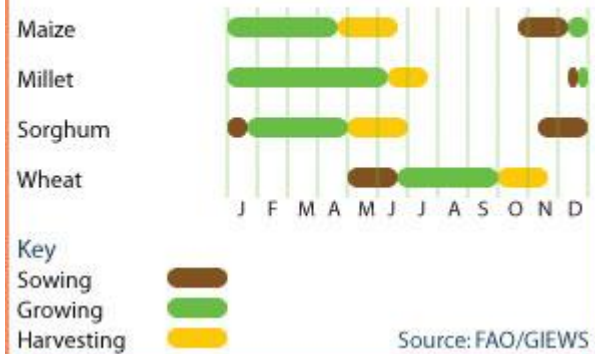
Maize production in 2013 is forecast at 2.6 million tonnes, 11 percent lower than last year but above the short-term average. Production of rice, sorghum and millet are also estimated to be lower than 2012, due to reduced yields; however, increased plantings for rice helped off-set a larger reduction in the rice output. In regard to cash crops, the lower prices of cotton last year contributed to a contraction in plantings and production consequently fell by about 50 percent to 140 000 tonnes. By contrast, soybean production increased significantly by 30 percent.

Sufficient cereal supplies, but lower exportable surplus

Domestic grain supplies, including carryover stocks, for the 2013/14 marketing year (May/April) are estimated to be sufficient for national requirements, except rice, with imports forecast between 15 000 to 20 000 tonnes. However, the lower maize production has decreased the exportable surplus.

The Government has initiated several reforms aimed at modifying the marketing arrangements of the Food Reserve Agency (FRA) in 2013/14. Unlike previous years, the FRA will focus on maize procurement primarily for the strategic grains reserves, while maintaining the previously established floor price of ZMW 65 per 50 kg. In addition, it will remove the subsidy of its sell-on price, which is expected to put upward pressure on maize meal prices. The Government has also removed a fuel subsidy and approved the increase in petrol and diesel prices. The removal of these subsidies is intended to lower the burden on fiscal resources, allowing funds to be directed towards public capital investment. While the Farm Input Support Programme (FISP) will continue to subsidise production costs for over 900 000 farmers, the modalities of the programme have changed, including the introduction of an e-voucher scheme and an

Crop calendar Zambia

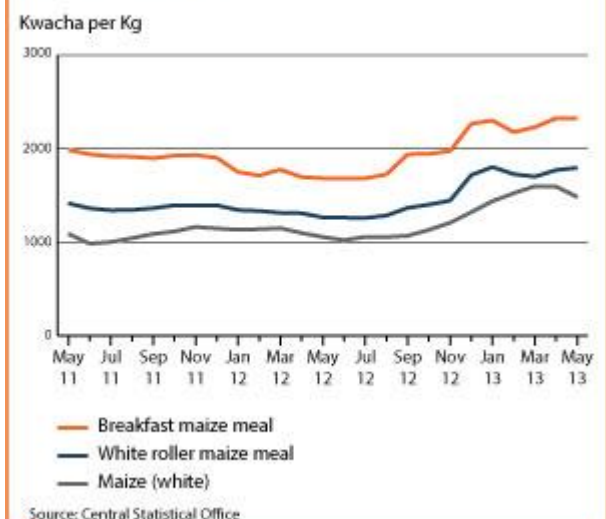


Zambia Cereal production

	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes		percent	
Maize	2,407	2,883	2,577	-11
Wheat	209	254	274	8
Rice (paddy)	44	45	45	0
Others	61	45	41	-9
Total	2,720	3,227	2,937	-9

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

Zambia Retail prices of maize



increase in the contribution by the farmer from ZMW 50 to ZMW 100.

Maize meal prices remain stable

Maize grain prices decreased moderately in May, as the 2013 harvest increases market supplies. Prices of breakfast maize meal remained virtually unchanged, after increasing in March and April following the government's intervention to raise the ceiling price to ZMW 55 per 25 kg (up ZMW 5). The increase was implemented to improve internal trade to remote areas, which was previously impeded by high transportation costs and comparatively low retail prices.

Food security conditions currently favourable

Overall, food security conditions are improving as supplies from the 2013 harvest increases households' food availability. However, the higher maize meal prices are expected to have affected household' access, particularly in urban areas where there is limited productive capacity. The release of the Zambia vulnerability assessment report, expected in July, will provide more detailed information on the food security situation and necessary interventions.

Reference Date: 18-April-2013

FOOD SECURITY SNAPSHOT

- Production prospects for the 2012/13 cropping season (October/June) are about average
- Widespread outbreak of armyworms damages crops in late 2012, but infestation was contained
- Food security situation remains stable, but high maize prices and poor production prospects in southern parts is a concern

Average production prospects for cereal crops in 2013

Harvesting of the main 2012/13 season's cereal crops is about to begin. Relatively normal rainfall patterns were recorded between November and March in most of the country. However, in southwestern areas, rains were below average during much of February and March. The water deficits that developed corresponded with the critical seed formation stage and together with the reported late distribution of fertiliser inputs through the national Farmer Input Support Programme (FISP), may impact negatively on the area's yields.

Although 2013 maize production estimates are yet to be made available, preliminary indications point to a smaller crop than last season, but the harvest is expected to remain above 2 million tonnes and near the short-term average.

Outbreak of army worms causes crop damage in late 2012

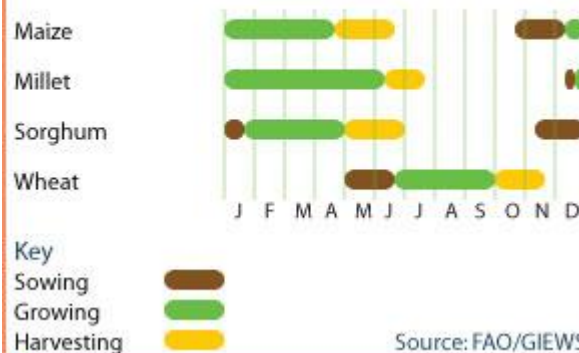
An outbreak of army worms in late 2012 affected seven provinces and approximately 100 000 hectares of cropped land. Following a joint response from the Government and partner institutions, the infestation was contained. Approximately 110 000 smallscale farmers were estimated to have been affected by the outbreak, but seeds and fertilisers were distributed to enable farmers to replant damaged crops. The impact may have been potentially greater if the late onset of rains had not transpired, which delayed plantings and, therefore, limited damage to standing crops.

Maize prices rise moderately in early 2013

Following a sharp increase in the price of maize meal during the last quarter of 2012, on account of strong export demand and localized supply shortages, the Government introduced a price ceiling at ZMW 50 per 25 kg in December 2012 for breakfast meal. This resulted in a moderate decline in February 2013, but high transportation costs rendered trade to remote parts of the country unprofitable thus restricting supplies and contributing to an upward price pressure for maize meal products. In response, the Government increased the ceiling price for breakfast maize meal to ZMW 55 per 25 kg in March 2013 with retail prices following this increase. The ceiling price of roller meal was also raised to ZMW 35-37 per 25 kg, although the average retail prices remained higher.

The Food Reserve Agency (FRA) is expected to continue to release stocks onto the market until the end of April. As of March 2013, FRA

Crop calendar Zambia

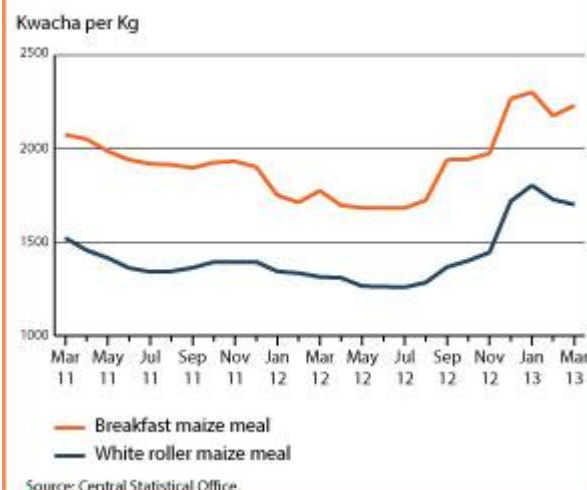


Zambia Cereal production

	2007-2011 average	2011	2012 estimate	change 2012/2011
	000 tonnes		percent	
Maize	2,103	3,020	2,853	-6
Wheat	181	237	254	7
Millet	39	38	28	-26
Others	59	69	62	-10
Total	2,382	3,364	3,197	-5

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

Zambia Retail prices of maize meal



was estimated to hold approximately 700 000 tonnes of maize, some of which was designated for export following agreements with the Democratic Republic of Congo, the United Republic of Tanzania, Malawi and Zimbabwe.

Food security conditions currently stable

Overall, food security conditions are stable. However, the sharp price increase of maize meal at the end of 2012 is expected to have affected household' access to food. The 2013 maize production is expected to cover national requirements for the 2013/14 marketing year (May/April), but localized production shortfalls in southwestern areas and the parts affected by army worms could face food security difficulties. The expected release of the Zambia vulnerability assessment report in June/July will provide more detailed information on household food security situation.

Reference Date: 15-October-2012

FOOD SECURITY SNAPSHOT

- Land preparation for 2012/13 cropping season began in October
- Rainfall forecasts indicate generally average conditions for the season
- Maize prices begin to rise in August, following stable period since the start of 2012
- Food security situation generally favourable

Rainfall forecasts point to generally normal conditions for 2012/13 cropping season

Land preparation for 2012/13 cropping season (October-June) is underway with the bulk of planting expected to begin from November onwards. The seasonal forecast indicates that most of the country is expected to receive normal rains between October and December 2012, apart from the far south-east and north-east, where normal to below-average rains are predicted. During the second half of the rainy season (January-March) higher rainfall amounts are forecast across the country, with potential heavy rains in northern regions.

As in previous years, large numbers of farmers will be able to access subsidised inputs (seeds and fertilisers) through the Farmer Input Support Programme (FISP), which will target 900 000 farmers for the 2012/13 season. In efforts to improve crop production diversity and broaden farmers' income sources, the FISP will also include inputs for sorghum, groundnuts and cotton. Approximately 10 000 cotton farmers have been identified to receive support.

Government increases strategic reserves

The large maize output from the 2012 harvest enabled the country to retain a significant national surplus, estimated at over 1 million tonnes, for the current 2012/13 marketing year (May/April). In efforts to counter-act potential upward price pressure from international markets and foreign traders, as well as maintain stable supplies, the government doubled the procurement of maize by the Food Reserve Agency (FRA) to 1 million tonnes for the strategic reserves (still less than the 1.75 million purchased in the previous marketing year). In addition, the government centralized the issuance of export permits in order to regulate the level of exports and manage national supplies.

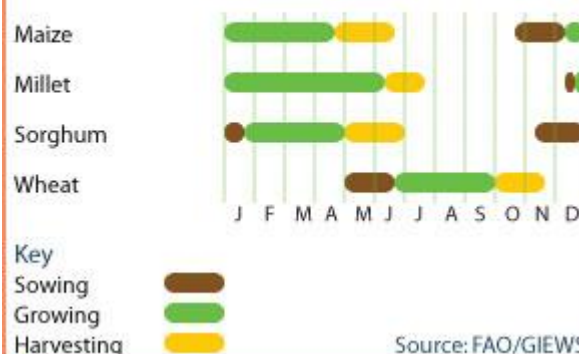
Maize prices begin to climb slightly

The country's ample maize supplies have helped to contain price increases during much of 2012. However, pressure from foreign traders has led to some rises in recent months, particularly in border markets, while the enlargement of the public procurement programme underpinned seasonable price growth. In August and the start of September prices rose month-on-month by 11 and 7 percent respectively, and were slightly above their levels of one year earlier.

Food security conditions currently stable

Stable food security conditions are reported across the country. The

Crop calendar Zambia

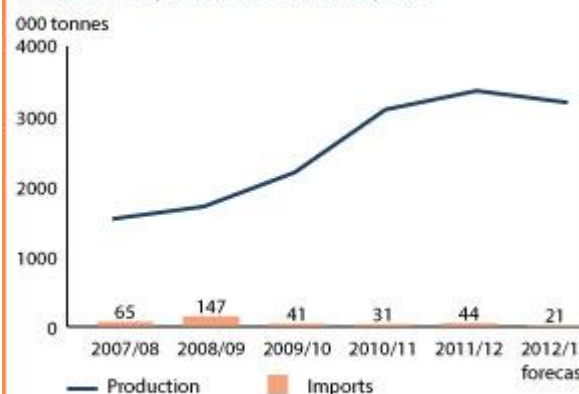


Zambia Cereal production

	2007-2011 average	2011	2012 estimate	change 2012/2011
	000 tonnes		percent	
Maize	2,103	3,020	2,853	-6
Wheat	181	237	254	7
Millet	39	38	28	-26
Others	59	69	62	-10
Total	2,382	3,364	3,197	-5

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

Zambia 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

above average 2012 cereal production and good national supplies of the main food staple maize have had a positive impact. However, current price rises are a concern especially with the approaching lean season (December-February), where food security conditions generally get tighter as households' reliance on market purchases increase.

Reference Date: 26-June-2012

FOOD SECURITY SNAPSHOT

- Another bumper maize harvest estimated for the 2011/12 cropping season
- Maize prices remain at low levels, due to abundant national supplies
- Overall food security situation is stable

Favourable maize harvest in 2012

The cereal harvesting period for the 2011/12 cropping season is drawing to a close. Latest official estimates point to a maize harvest of about 2.85 million tonnes, well above the five-year average (although 6 percent lower than last season's record output). Rainfall was generally satisfactory throughout the cropping season (October - April), although a period of below average rains in February caused crop wilting. This was cited as the primary reason for some unharvested fields in the southern provinces of Lusaka, Eastern and Southern. Sorghum, millet and rice production also registered some decline, while the winter wheat crop, for harvest from next October-November, is expected to increase by 6 percent over last year to 254 000 tonnes.

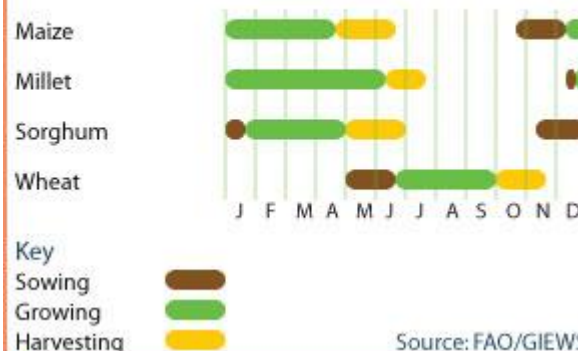
The lower maize plantings in 2011/12, compared to last year, was primarily a result of a shift to cash crop production. Growing demand for feedstock from the poultry industry prompted many large scale farmers to expand soybean production in 2011/12, as an alternative to maize. As a result, soybean production, estimated at 203 000 tonnes, grew by a significant 74 percent compared to last year. In addition, cotton production, predominantly grown by small scale farmers, more than doubled compared to last season, estimated at 270 000 tonnes.

Maize supplies more than sufficient to cover national requirements

Given the 2012 production levels, the country is estimated to have an exportable surplus of over 1 million tonnes in the 2012/13 marketing year (May/April). In the previous marketing year, an estimated 500 000 tonnes of maize were exported, including some 128 000 tonnes to South Africa. About 300 000 tonnes have been earmarked for export to Zimbabwe, following an recent agreement between the two countries. Similarly, if wheat production forecasts are realized, the national surplus will reach nearly 100 000 tonnes.

The Food Reserve Agency (FRA) will continue to purchase maize in the current marketing year, mainly from small scale farmers, while also maintaining the floor price at ZMK 65 000 per 50 kg bag. The FRA has planned to procure 500 000 tonnes of maize, designated for the strategic reserves, marking a reduction compared to the 1.75 million tonnes purchased in the previous marketing year. In addition, the FRA will purchase 2 100 tonnes of rice. The size of maize supplies handled by FRA still poses a problem in relation to their storage capacity. An estimated 190 000 tonnes were reported to have been lost in 2012 due to inadequate storage facilities; however, the country is expanding their capacity to mitigate against future losses.

Crop calendar Zambia

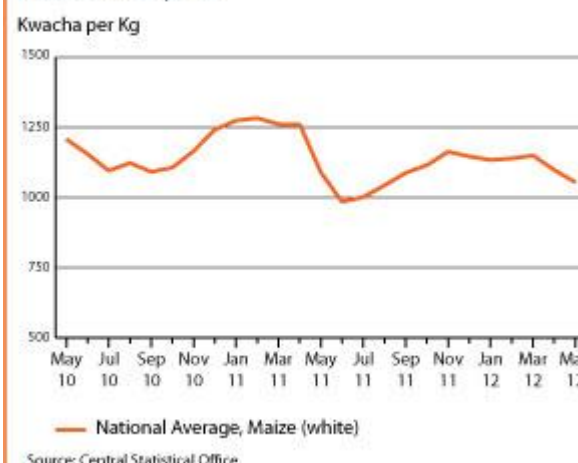


Zambia Cereal production

	2007-2011 average	2011	2012 forecast	change 2012/2011
	000 tonnes		percent	
Maize	2 103	3 020	2 853	-6
Wheat	181	237	254	7
Millet	39	38	28	-26
Others	59	69	62	-10
Total	2 382	3 364	3 197	-5

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

Zambia Retail maize price



Low maize prices remain

Maize prices remained at low and stable levels during 2011 and the first half of 2012, continuing the decreasing trend that began in early 2009. Between January and May 2012 prices were about 10 percent below levels of last year for the same period. Correspondingly, prices of maize meal products are equally low in relation to last year. For example, roller meal and breakfast meal prices registered a year-on-year decrease of 16 and 12 percent, respectively, in May 2012.

Satisfactory food security conditions

Favourable food security conditions are reported across the country. The above average 2012 cereal production and continuing low prices of the main food staple maize are expected to have a positive impact on conditions in the next few months. However, in southern parts which were affected by a prolonged dry spell in early 2012, households that suffered production losses may be forced to access market supplies earlier than normal, which could aggravate food security conditions of resource poor households.

Reference Date: 21-March-2012

FOOD SECURITY SNAPSHOT

- Rains improve for second half of the rainy season (January-March 2012)
- Abundant maize supplies contribute to low and falling prices
- Overall food security situation is stable

Improved rains since the start of 2012 benefit crop development

Since the start of 2012, rains have been generally normal to above normal across the country, benefiting crop development, in contrast to the erratic rains received during first three months (October-December 2011) of the 2011/12 rainy season (October-March). The low moisture levels recorded at the start of the cropping season hindered early crop development and consequently replanting was required in some affected areas. However, remotely sensed data, as of the first dekad of March 2012, confirms satisfactory vegetation conditions in much of the country. In parts of the Southern province however, localised dry spells since the beginning of 2012 has resulted in crop stress, which may impact production.

Given the high volume of maize supplies in the country and increased costs of fertiliser, many commercial farmers opted to reduce maize plantings in favour of alternative crops, including soya-beans, sunflower and cotton. However, small farmers continue to dedicate a large proportion of their land to maize, given the continued support from the Farmer Input Support Programme (FISP). Although no official forecasts are available, production is preliminarily forecast to be below the level of 2011, but well above the previous five-year average, given a probable reduction in plantings.

Satisfactory supplies help to maintain low prices

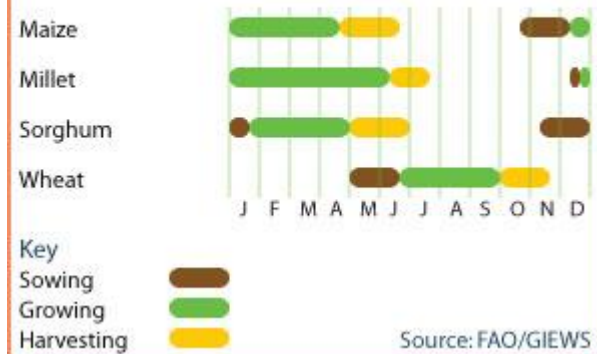
Following the record maize output in 2011, good national maize supplies have kept prices at low levels during 2011 and into the start of 2012. In contrast to normal seasonal trends, the national average price of maize grain declined moderately in December and January to about ZMK 1 750 per kg, some 11 percent lower than in January 2011. Similarly, maize meal products decreased during these months.

During 2011, the Food Reserve Agency (FRA) exceeded its procurement target of 1.3 million tonnes of maize, by about 35 percent, purchasing approximately 1.75 million tonnes by the end of October 2011. Given the ample national supplies, the government approved the sale of 1 million tonnes from the FRA stock, including 600 000 tonnes designated for the export market. However, current estimates indicate that only about 500 000 tonnes have been sold on the domestic and export markets, leaving a large carry-over stock levels for the 2012/13 marketing year (May/April). This could put pressure on national storage facilities, and may impact marketing operations in the subsequent year.

Food security conditions generally favourable

Overall, national food security conditions remain favourable in most areas of the country, benefiting from ample supplies and comparatively

Crop calendar Zambia

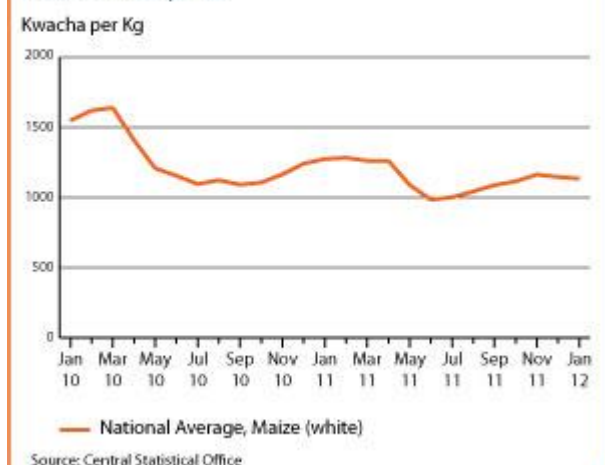


Zambia Cereal production

	2006-2010 average	2010	2011 estimate	change 2011/2010
	000 tonnes		percent	
Maize	1 784	2 795	3 020	8
Wheat	152	172	237	38
Millet	41	48	38	-21
Others	52	82	69	-16
Total	2 030	3 097	3 364	9

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

Zambia Retail maize price



stable and low maize prices. Localised areas affected by heavy rains and prolonged dry periods in Southern and Eastern provinces may suffer from localised production shortfalls, with negative implications for the food security conditions of the affected households during the next marketing year.

Reference Date: 17-January-2012

FOOD SECURITY SNAPSHOT

- Poor rains in central and eastern regions at the start of the 2011/12 cropping season delay planting activities
- Maize prices climb moderately, but remain at relatively low levels
- Overall food security situation is stable

Uneven rains at the beginning of 2011/12 cropping season

Due to the late start of effective rains at the beginning of the 2011/12 agricultural season (normally beginning in October) in southern and eastern parts of the country, planting activities were delayed and continued into January 2012. As a result of the potential shorter growing period, this induced some farmers to opt for early maturing maize varieties. The low moisture levels recorded at the start of the cropping season also hindered early crop development and consequently replanting was required in some affected areas. Cumulative rainfall levels in the large maize producing provinces of Central and Eastern were about 10 to 20 percent below average levels between October and December 2011. However, in northern and western regions, generally favourable rains have been observed over the same period. Forecasts point to increased chances of normal to above normal rains for the remainder of January and February, which should help ease early season water deficits and benefit crop development.

The Farmer Input Support Programme (FISP), which expanded its coverage for the current cropping season, is expected to continue boosting production, particularly for maize, if favourable weather conditions prevail during the second half of the cropping season. The government has announced that the focus of the FISP towards supporting a larger variety of crops other than maize will be broadened in subsequent cropping seasons.

Record maize crop for 2011

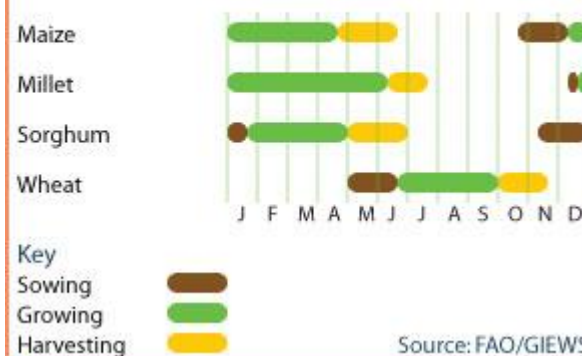
Aggregate cereal production in 2011 was estimated at about 3.4 million tonnes, which includes a record maize harvest of just over 3 million tonnes, 8 percent larger than the bumper 2010 output. Generally favourable rainfall and continued input assistance, which supported larger plantings, are attributed to the increased production. However, flooding and a dry spell led to some localised crop losses in southern and south-western regions.

Adequate supplies support low maize prices

Favourable national maize supplies resulted in relatively low prices during 2011 with some moderate increases observed since August 2011. Based on data released by the Bank of Zambia prices hovered at about ZMK 845 at the end of 2011 compared to about ZMK 980 in December 2010.

During 2011 the Food Reserve Agency (FRA) exceeded its procurement target of 1.3 million tonnes of maize, by about 35 percent,

Crop calendar Zambia

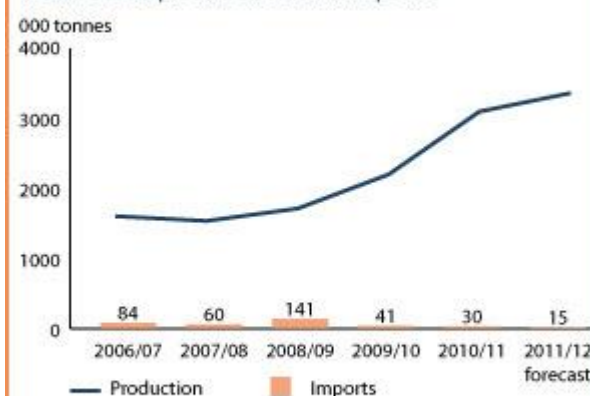


Zambia Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes		percent	
Maize	1 784	2 795	3 020	8
Wheat	152	172	237	38
Millet	41	48	38	-21
Others	60	76	56	-26
Total	2 030	3 097	3 360	8

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

Zambia 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

purchasing approximately 1.75 million tonnes by the end of October 2011. Given the ample national supplies the government approved the sale of 1 million tonnes from the FRA stock, including 600 000 tonnes designated for the export market.

Food security conditions generally favourable

Overall, national food security conditions remain favourable in most areas of the country. However, the vulnerability assessment committee indicated that an estimated 74 804 persons remain food insecure, as a result of localised production short-falls in 2010/11. The relatively low and stable price levels however, are expected to benefit low income households and help stabilize national food security conditions.



Reference Date: 10-September-2011

FOOD SECURITY SNAPSHOT

- Record maize crop for 2011, supported by favourable rains and continued input assistance
- Abundant maize supplies maintain low and stable prices
- Food security situation is stable, but areas that were affected by floods and a dry-spell suffer localised production short-falls

Record maize crop for 2011

A record maize harvest of just over 3 million tonnes is estimated in 2011, 8 percent larger than the previous season's output. Generally favourable rainfall and continued input assistance through the Farmer Input Support Programme (FSIP), which supported an estimated 900 000 beneficiaries, are attributed to an expansion in plantings and consequently a larger harvest in 2011. However, flooding and a dry spell led to some localised crop losses in southern and south-western regions. Reports indicate that permanent wilting and flood damage were the main cause for unharvested crops, with Southern and Western provinces registering the largest proportions of unharvested land relative to the area planted to maize.

In contrast to the good maize performance, production of millet and sorghum fell in 2011 relative to last season, attributed to a fall in the area planted and lower yields. Similarly, the area planted to rice declined, but improved yields (an increase of 22 percent relative to last year) compensated for the contraction and consequently production is estimated to have only fallen marginally compared with last season's output. Preliminary forecast of winter wheat production indicate an increase of 38 percent compared to last year, due to increased plantings. Harvesting of the winter wheat crop is scheduled to commence in October.

Plentiful supplies support low maize prices

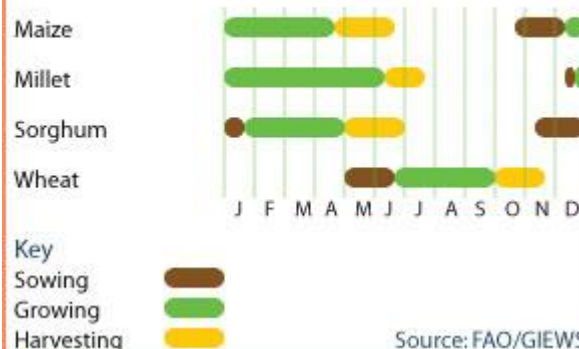
Low prices prevail across most of the country, reflecting abundant supplies from the 2011 harvest and favourable stock levels, built-up from last year's good crop. The national average price of maize in August 2011, at ZMK 1 040 per kg, is at its lowest level compared to the last three years for the same month, but prices increased moderately by 6 percent from a seasonal low in June.

For the 2011/12 marketing year (May/April) the government's Food Reserve Agency (FRA) has set a procurement target of 1.3 million tonnes of maize, to be purchased between June and October 2011, at a cost of ZMK 1 300 per kg. The FRA has also planned to purchase 5 000 tonnes of rice, at a price of ZMK 1 500 per kg.

Food security conditions mostly favourable

Overall, national food security conditions remain favourable in most areas of the country. However, the vulnerability assessment committee indicates that an estimated 74 804 persons remain food insecure, following localised production short-falls, due a combination of floods and dry weather conditions. The areas affected are located in Western, Southern, North-Western and Lusaka provinces.

Crop calendar Zambia

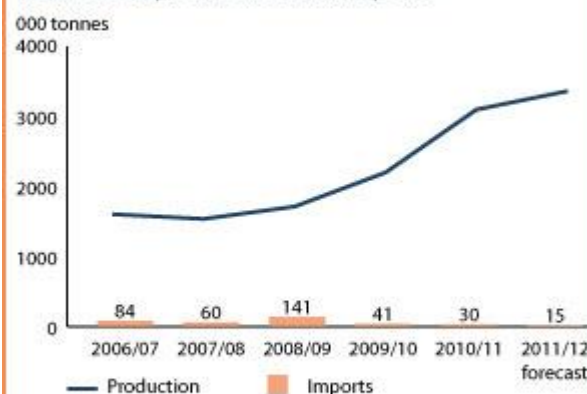


Zambia Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes		percent	
Maize	1 784	2 795	3 020	8
Wheat	152	172	237	38
Millet	41	48	38	-21
Others	60	76	56	-26
Total	2 030	3 097	3 360	8

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

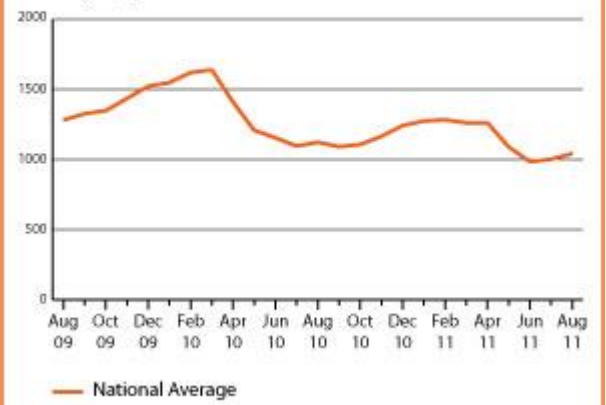
Zambia Total cereal production and imports



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

Zambia Retail maize price

Kwacha per Kg



Source: Central Statistical Office

Reference Date: 26-May-2011

FOOD SECURITY SNAPSHOT

- Generally favourable rains support a bumper maize crop in 2011
- Maize prices remain low and stable, as a result of abundant national supplies and favourable crop prospects
- Food security situation is stable, but areas that were affected by floods and a dry-spell may suffer localised production short-falls

Bumper maize harvest estimated for 2011 crop

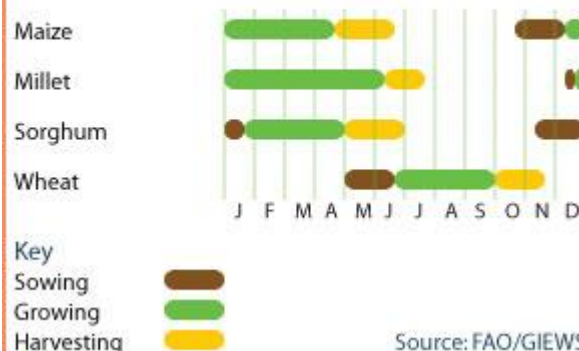
Harvesting of the main maize crop is currently underway. The Government's crop estimates indicate a record harvest of just over million tonnes for the 2011 maize crop, 8 percent larger than the previous season's output. Favourable rains and continued assistance to agriculture through the Farmer Input Support Programme (FSIP), which supported an estimated 900 000 beneficiaries, are attributed to an expansion in plantings. Rainfall patterns were generally favourable from October to April across the country, but periods of heavy rains in January and deficits during February were observed. The heavy rains at the beginning of the year were predominantly concentrated in areas along the Zambezi basin, affecting Western, Southern and Lusaka provinces. A report by the Zambia Vulnerability Assessment Committee (VAC) indicates that up to 25 percent of some staple crops could be affected by water logging in the worst affected districts. The dry-spell, which had an impact on staple crops in south-eastern areas of the subregion, caused wilting in Mambwe Kaoma, Sesheke and Senanga districts. Production of millet and sorghum fell this year relative to last, attributed to a fall in the area planted and lower yields. Similarly, the area planted to rice declined, but owing to improved yields (increase of 22 percent), production is estimated to have only fallen marginally compared with last season's output. Winter wheat production is forecast to increase by 39 percent, due to increased plantings. Harvesting of the winter wheat crop is scheduled to commence in October.

Country forecast to retain a large national stock in 2011/12 marketing year

The substantial 2010 maize harvest resulted in a national surplus estimated at just over 1 million tonnes for the 2010/11 marketing year (May/April). Consequently, the (FRA) purchased just under 900 000 tonnes of maize and as of February 2011 163 600 tonnes had been exported, mainly to Zimbabwe and the Democratic Republic of Congo. Given the bumper harvest in 2011, the country is expected to end up with substantial amount of surplus.

Informal trade between Zambia and the Democratic Republic of Congo (DRC) rose significantly during the 2010/11 marketing year compared to the previous marketing year. WFP/FEWSNet estimate that just under 13 000 tonnes of maize grain crossed the Kasumba border point with DRC between April and March 2011, exceeding the previous year's level by about 3 000 tonnes. The abundant national supplies and price differentials between the two countries supported the cross border exports.

Crop calendar Zambia

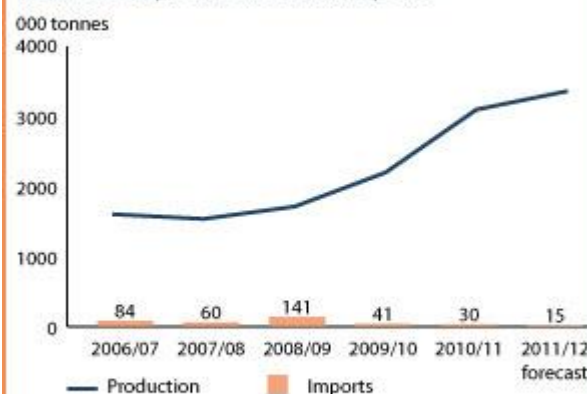


Zambia Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes		percent	
Maize	1 784	2 795	3 020	8
Wheat	152	172	237	38
Millet	41	48	38	-21
Others	60	76	56	-26
Total	2 030	3 097	3 360	8

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

Zambia Total cereal production and imports



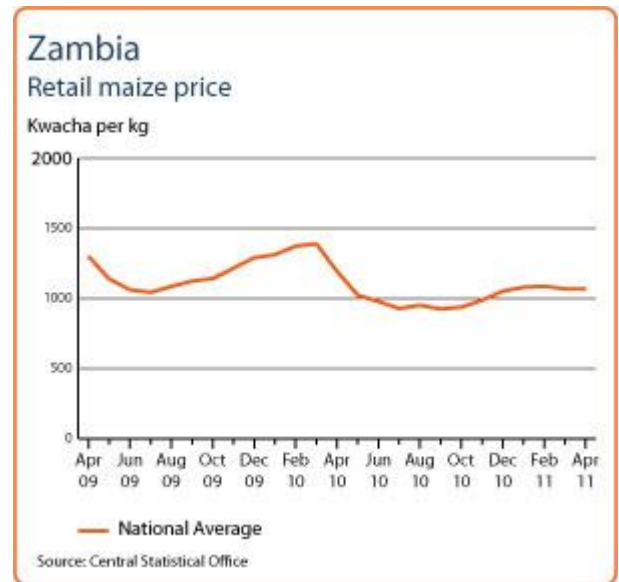
Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Price levels remain low

The national average price of maize fell sharply since the bumper harvest in 2010 and remained low since. Maize grain prices usually conform to annual patterns, with peak prices observed in March prior to the harvest, followed by a decline until June/July. Although the national average maize price followed this trend during the 2010/11 marketing year, the large domestic supplies contributed to limiting the seasonal price rise. Between July 2010 and March 2011 grain prices increased by only 15 percent, compared to 33 percent over the same period in the previous year. The Government's Food Reserve Agency (FRA) issued a directive in March setting the price of maize for millers at USD 160 per tonne, down from USD 200. This is expected to exert a downward pressure on milled prices,

Food security conditions mostly favourable

Overall, national food security conditions remain favourable in most areas, owing to comparatively low and stable maize prices, and adequate national supplies. However, areas that were affected by floods and dry weather may suffer localized production short-falls, with regard to both food and cash crops, mainly in areas in Western, Southern and Lusaka provinces.



Reference Date: 18-April-2011

FOOD SECURITY SNAPSHOT

- Generally favourable rains support an anticipated bumper 2011 maize harvest
- Maize prices low, as a result of abundant national supplies
- Food security situation is stable, but areas that were affected by floods and a dry-spell may suffer localised production short-falls

Bumper maize harvest expected in 2011

Harvesting of the main maize crop will commence in this month of April. The Government's preliminary crop forecast indicates a bumper harvest of over 3 million tonnes for the 2011 maize crop. Favourable rains and continued assistance through the Farmer Input Support Programme (FSIP), supporting an estimated 900 000 beneficiaries, are attributed to an expansion in plantings and expected yield increases; however, a detailed crop report is not yet available. Rainfall patterns have been generally favourable from October to March across the country, but this weather pattern was punctured by periods of heavy rains in January and deficits during February. The heavy rains at the beginning of the year were predominantly concentrated in areas along the Zambezi basin, affecting Western, Southern and Lusaka provinces. A report by the Zambia Vulnerability Assessment Committee (VAC) indicates that up to 25 percent of some staple crops could be affected by water logging in the worst affected districts. The dry-spell, which had an impact on staple crops in south-eastern areas of the subregion, caused wilting in Mambwe Kaoma, Sesheke and Senanga districts.

Country retains large national stock, but exports increase

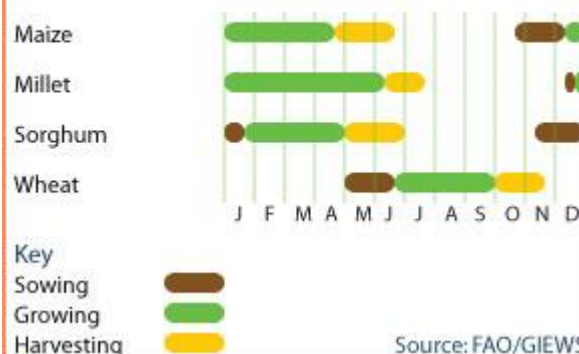
The substantial 2010 maize harvest resulted in a national surplus estimated at just over 1 million tonnes for the 2010/11 marketing year (May/April). Consequently, the (FRA) purchased just under 900 000 tonnes of maize and as of February 2011 163 600 tonnes had been exported, mainly to Zimbabwe and the Democratic Republic of Congo. It is expected that this figure will increase as additional quantities are exported before the end of the marketing year.

Informal trade between Zambia and the Democratic Republic of Congo (DRC) rose significantly compared to the previous marketing year. WFP/FEWSNet estimate that just over 12 000 tonnes of maize grain crossed the Kasumba border point with DRC between April and February, exceeding the previous year's level by 3 000 tonnes. The abundant national supplies and price differentials between the two countries have supported the grain flows out of Zambia to DRC.

Prices continue to remain at low levels

The national average price of maize has fallen sharply since the record harvest in 2010, and low price levels have been maintained during the current marketing year. Based on figures from the national Bank of Zambia, milled maize prices declined from mid-January to mid-March, in contrast to seasonal patterns. The Government issued a directive in March setting the Food Reserve Agency (FRA) maize price for millers at USD 160 per tonne, down from USD 200. This is expected to exert

Crop calendar Zambia

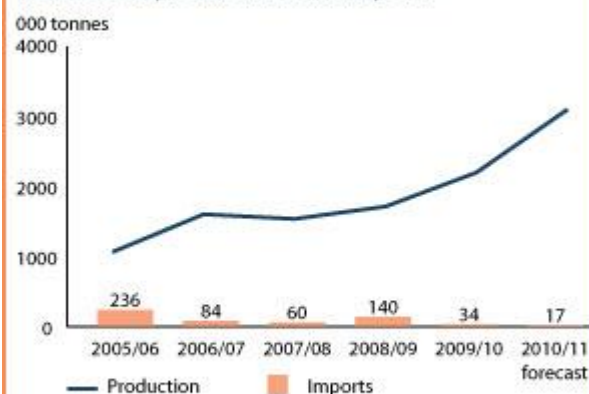


Zambia Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Maize	1398	1889	2796	48
Wheat	145	196	172	-12
Millet	38	49	48	-2
Others	43	66	83	26
Total	1624	2199	3099	41

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

Zambia 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

downward pressure on milled prices.

Food security conditions mostly favourable

Overall, national food security conditions remain favourable in most areas, owing to comparatively low and stable maize prices, and adequate national supplies. However, areas that were affected by floods and dry weather may suffer localized production short-falls, in regard to both food and cash crops, mainly in areas in Western, Southern and Lusaka provinces.

Reference Date: 03-January-2011

FOOD SECURITY SNAPSHOT

- Good rains during November and early December have favoured plantings of 2011 crops
- After a sharp decline since early-2010, maize grain prices have strengthened slightly, but remain lower than last year
- Food security situation is favourable, with only localised pockets of food insecurity

Favourable rains support seasonal cropping activities

Planting activities for the 2010/11 season are complete in most areas across the country and were supported by sufficient rainfall during November and early December in most areas. In Lundazi district, in the eastern region, planting was delayed due to erratic rains at the beginning of the season. In the major southern producing provinces, substantial rains fell in the last dekad of November and early December; but rainfall deficits were observed in late November in eastern and western regions. Overall, meteorological reports indicate good crop growth. The Government of Zambia has expanded the Farmer Input Support Programme (FSIP) for the current agricultural season, targeting an estimated 900 000 beneficiaries, up from 500 000 in the previous season. The Government has also proposed to allocate increased funding to expand the area under irrigation, as a means to reduce the country's reliance on rain-fed agriculture.

2010 maize harvest reaches record level

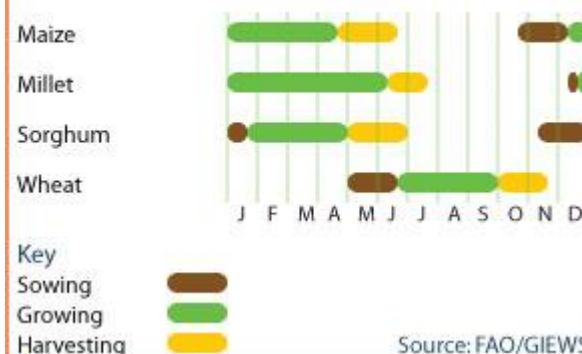
Latest figures indicate that the 2009/10 season's maize crop reached an estimated 2.8 million tonnes; this represents a record crop and marks a 48 percent increase over the previous year's harvest. The increase is attributed to favourable prices received by farmers last season that encouraged an expansion in the area planted with maize by 14 percent over the previous year's level, as well as good rainfall and an improvement in the availability of inputs. Total cereal production is estimated at 3.1 million tonnes for the 2009/10 agricultural season.

Significant national surplus of maize

The substantial 2010 maize harvest has resulted in a national surplus estimated at just over 1 million tonnes for the 2010/11 marketing year (May/April). Consequently, the Food Reserve Agency (FRA) has purchased just under 900 000 tonnes of maize and signed agreements to export 82 000 tonnes. It is anticipated that more maize will be exported; however, the quantity of exports will also depend on regional price differences which will determine Zambia's export competitiveness. Overall, it is estimated that 43 percent of maize production from smallholders will be sold on the market, with the largest proportion supplied from the Central province. Domestic sales of maize by FRA are expected to start shortly as the lean season progresses, which will assist in supporting market supplies and maintaining stable prices.

Informal trade between Zambia and the Democratic Republic of Congo (DRC) has increased significantly compared to the previous two seasons. WFP/FEWSNet estimated that 8 280 tonnes of maize grain

Crop calendar Zambia

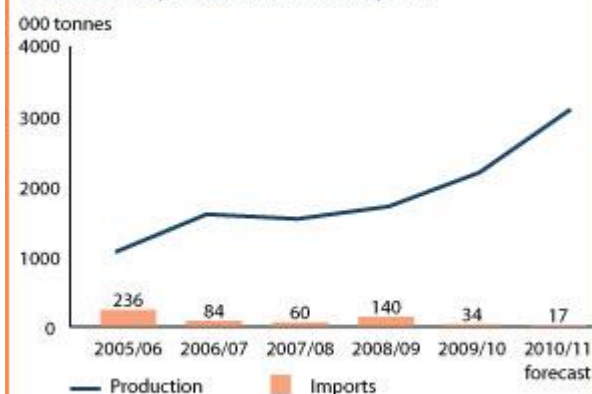


Zambia Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Maize	1398	1889	2796	48
Wheat	145	196	172	-12
Millet	38	49	48	-2
Others	43	66	83	26
Total	1624	2199	3099	41

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

Zambia 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

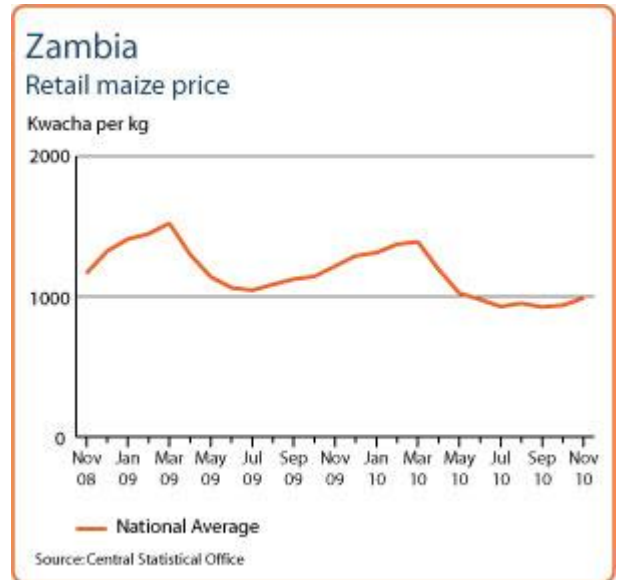
has crossed the Kasumba border point between April and October; this quantity is more than three times the amount recorded in the previous year for the same period. Informal outflows have been supported by ample national supplies and price differentials between the two countries.

Large market supplies depress maize prices

The national average price of maize grain has fallen sharply since the harvest of the record crop earlier in 2010. However, there has been some increase in the last two months, but maize grain prices, as of November, remain 19 percent lower than at the same time last year. Prices of white roller maize meal have also increased in line with the movement of grain prices, while, by contrast, the average price of breakfast maize meal has continued to fall.

Food security conditions mostly favourable

Overall, national food security conditions remain favourable in most areas. Notable exceptions are the districts of Luangwa, Lukulu, Namwala and Sesheke, where 54 000 people, are estimated by the Zambia's Vulnerability Assessment Committee (VAC) to require assistance for the 2010/11 marketing year. These districts received insufficient rains during January and February 2010, leading to production short-falls in the affected area.



Reference Date: 14-September-2010

FOOD SECURITY SNAPSHOT

- Record maize crop for the 2009/10 agricultural season, but lower wheat output anticipated.
- Maize grain and meal prices have declined sharply, reflecting improved market supplies.
- Food security situation improves across the country, but some 54 000 people in areas affected by prolonged dry conditions during January and February will require food assistance.

2010 maize harvest reaches record level

The 2009/10 season's maize crop is estimated at 2.8 million tonnes; this represents a record crop and marks a 48 percent increase over last year's harvest. The increase is attributed to favourable prices received by farmers last season that encouraged them to expand the area planted with maize, as well as the good rainfall received in most parts of the country, and an improvement in the availability of inputs. Under the Government's Farmer Input Support Programme (FISP), 500 000 beneficiaries were provided with agricultural inputs that were sufficient to cover approximately half a hectare. Overall, the area planted grew by 14 percent relative to last season, in addition, productivity of small-scale – the largest contributors to national output – and medium-scale farmers increased, with yields averaging 2.1 tonnes per hectare. Rice and sorghum production also recorded increases compared to the 2009 output, but the millet harvest was smaller and forecasts for wheat production (harvesting commences in October) indicate a reduction by 12 percent, on account of a contraction in the area planted. Total cereal production is estimated at 3.1 million tonnes for the 2009/10 agricultural season.

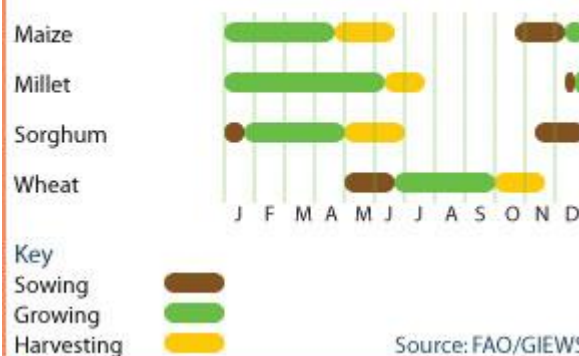
For the 2010/11 agricultural season the Government will increase the number of beneficiaries under the FISP to 600 000. Land preparation is scheduled to begin in October.

Significant national surplus of maize

The substantial maize harvest has resulted in a national surplus estimated at just over 1 million tonnes for the 2010/11 marketing year (May/April). Consequently, the Food Reserve Agency (FRA) has contracted seven companies to export 160 569 tonnes of maize, while it has planned to purchase 300 000 tonnes during the current season at a price of ZMK 1300 per kg (US\$270 per tonne). Other market actors, millers and traders, have purchased between 250 000 and 300 000 tonnes, but at a lower procurement price compared to FRA's established rate.

Informal trade between Zambia and the Democratic Republic of Congo (DRC) has increased significantly compared to the previous two seasons. WFP/FEWSNet estimated that 8 805 tonnes of maize grain has crossed the Kasumba border point between April and June; this quantity is more than three times the amount recorded in the previous year for the same months. Informal outflows have been supported by the ample national supplies and lower prices compared to levels observed in DRC.

Crop calendar Zambia

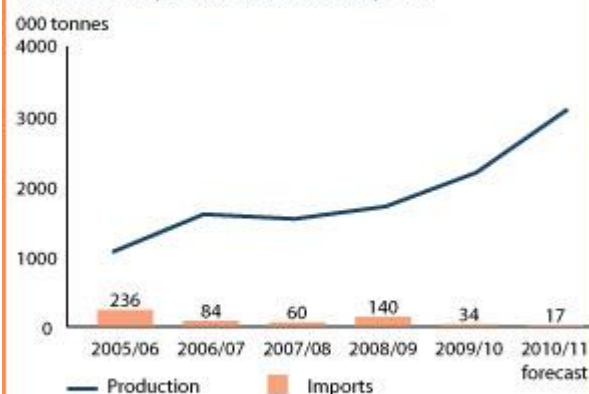


Zambia Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Maize	1398	1889	2796	48
Wheat	145	196	172	-12
Millet	38	49	48	-2
Others	43	66	83	26
Total	1624	2199	3099	41

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

Zambia 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

Large market supplies depress maize prices

By August, the national average price of maize fell by 32 percent since reaching a seasonal peak in March 2010. At ZMK 952 per kg, the price is 12 percent lower than in August 2009, but at a comparable level to the same month two years earlier. Prices of maize meal have also declined in line with the price movement of maize grain, while wheat flour prices have remained relatively stable between March and August.

Food security conditions improve throughout the country

Food security conditions across the country have improved this year; however, estimates by ZamVAC indicate that 54 000 people, located in the districts of Luangwa, Lukulu, Namwala and Sesheke, will require assistance for the 2010/11 marketing year. These districts received insufficient rainfall during January and February, which adversely affected crop production in localised areas.

Reference Date: 20-March-2010

FOOD SECURITY SNAPSHOT

- Early indications for 2010 maize crop point to another good crop this year, following the record crop harvested in 2009.
- Overall food supply satisfactory but maize prices have increased in recent months, and remain still above normal.
- Pockets of food insecurity remain especially in areas affected by earlier flooding.

Larger plantings and favourable weather point to another good maize crop in 2010

Planting of summer cereal crops (mostly maize) were completed by end December under normal conditions in all areas, except southern parts of the country where rainfall was below average and erratic. Moisture conditions have favoured crop growth and development in all regions, including the South. Overall, crop prospects are favourable and a maize production close to last year record is expected. Fresh maize is already available in the markets. The number of farmers benefiting from the distribution of Government subsidized inputs has increased from the previous year and larger plantings of maize and other crops were expected also because of favourable prices. The first crop estimate is expected to be released in early April.

Record maize crop recorded in 2009

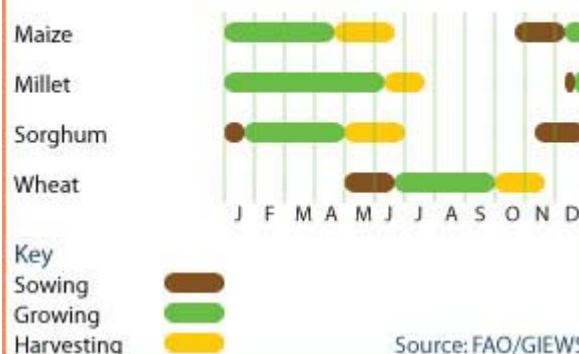
The 2009 maize harvest was a record 1.89 million tonnes, 31 percent above the previous year's level and 50 percent above the five year average. Wheat production for 2009 was 5 percent above the previous year's output primarily on account of an expansion in the area planted. Well distributed rainfall, combined with the Government fertilizer subsidy distributions and relatively attractive price offered to farmers at planting time contributed to the bumper cereal harvest in 2009.

Food security situation favourable overall, but despite increased market supplies, maize prices remain above average

At national level the food security situation is favourable with ample supplies of maize until the next harvest. The record 2009 crop has resulted in a maize surplus of some 200 000 tonnes in the 2009/10 marketing year (May/April) of which some 100 000 tonnes were to be exported, but these have only partially materialized. With the lean season approaching supplies in the market have diminished and prices have started to climb somewhat, a normal development at this time of the year. However the increase this year has been modest compared to the previous year. Small-scale farmers have depleted their own stocks and will have to rely on the market to meet their consumption requirements. Supplies are available from the Government Food Security Reserve (FSR) and private traders, but poorer household in chronically food insecure areas may have difficulty in accessing food from the market.

In spite of the increased domestic availability, the national average price of maize has remained high and has seasonally increased since

Crop calendar Zambia

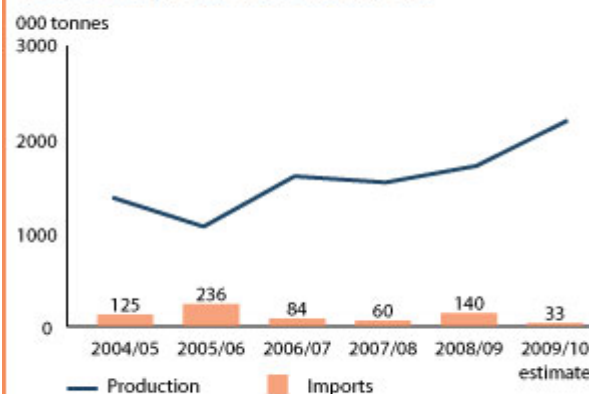


Zambia Cereal production

	2004-2008 average	2008	2009 estimate	change 2009/2008
	000 tonnes			percent
Maize	1263	1446	1889	31
Wheat	123	185	195	5
Millet	36	39	49	26
Others	38	44	66	50
Total	1459	1714	2199	28

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

Zambia 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

last August, reaching MZK 1 373/kg in February, 31 percent higher than in July 2009, the lowest level after the harvest, and 51 percent higher than in the same period in 2008. High transportation costs are some of the reasons for the relatively high maize prices in local markets this year. In contrast to maize, prices of wheat have declined in recent months, despite the ban on wheat imports, reflecting another good domestic harvest.

Food security of vulnerable groups improved

The food security situation of vulnerable groups has improved in the 2009/10 marketing year mainly as a result of the record 2009 harvest. The number of people requiring humanitarian assistance has decreased from about 445 000 in 2008/09 to some 111 000 in 2009/10. These are mostly small-scale farmers who lost their crops to floods or were adversely affected by dry spells early in 2009.



Reference Date: 1 February-2010

FOOD SECURITY SNAPSHOT

- Prospects for 2010 maize crop mostly favourable so far
- A record maize crop was harvested in 2009
- Overall food supply satisfactory but maize prices have increased in recent months, and remain still above normal
- Pockets of food insecurity remain especially in areas affected by earlier flooding

Conditions of main season 2010 maize crop good overall, larger plantings

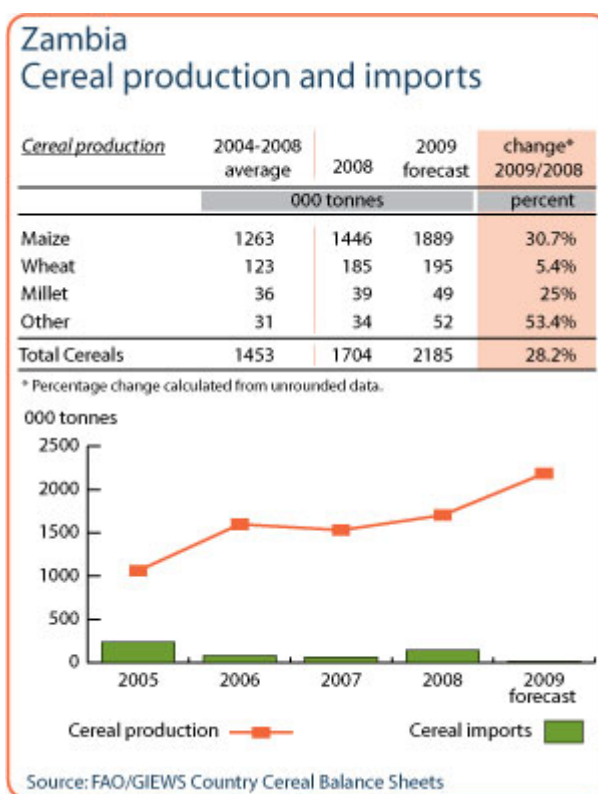
Planting of summer cereal crops (mostly maize) were completed by end December under normal conditions in all areas, except southern parts of the country where rainfall was below average and erratic. Overall, crop conditions are mostly favourable so far. In southern parts, where dry conditions were reported in December, normal rains were received throughout January and now crops are reported to be performing well with few exceptions. Fresh maize is already available in the markets. The number of farmers benefiting from the distribution of Government subsidized inputs has increased from the previous year and larger plantings of maize and other crops were expected also because of favourable prices. But final outcome depends on crops throughout the country receiving needed moisture in the remainder of the growing season.

Record maize crop recorded in 2009

The 2009 maize harvest, completed earlier in the year, was a record 1.89 million tonnes, 31 percent above the previous year's level and 50 percent above the five year average. Estimates for wheat production for 2009, recently harvested, indicate an increase of 5 percent over last year's output primarily on account of an expansion in the area planted. Well distributed rainfall, combined with the Government fertilizer subsidy distributions and relatively attractive price offered to farmers at planting time contributed to the bumper cereal harvest in 2009.

Food security situation favourable overall, but despite increased market supplies, maize prices remain above average

At national level the food security situation is favourable with ample supplies of maize until the next harvest. The record 2009 crop has resulted in a maize surplus of some 200 000 tonnes in the 2009/10 marketing year (May/April) of which some 100 000 tonnes were to be exported, but these have only partially materialized. With the lean season approaching supplies in the market have diminished and prices have started to climb somewhat, a normal development at this time of the year. However the increase this year has been modest compared to the previous year. Small-scale farmers have depleted their own stocks and will have to rely on the market to meet their consumption requirements. Supplies are available from the Government Food Security Reserve (FSR) and private traders, but poorer household in chronically food insecure areas may have difficulty in accessing food from the market.



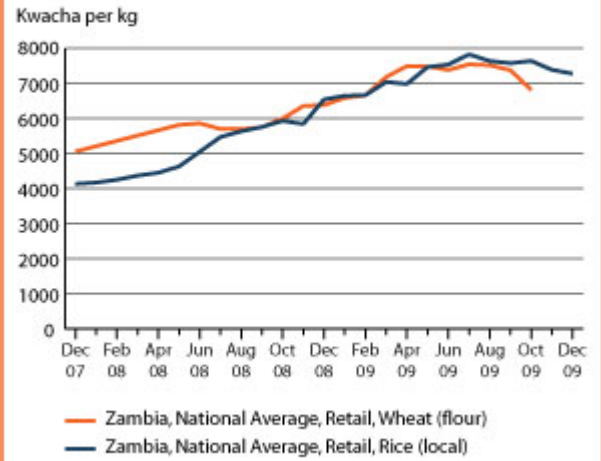
In spite of the increased domestic availability, the national average price of maize has remained high and has seasonally increased since last August, reaching MZK 1 290/kg in December, 24 percent higher than in July and 57 percent higher than in the same period in 2007. High transportation costs are some of the reasons for the relatively high maize prices in local markets this year. In contrast to maize, prices of wheat have declined in recent months, despite the ban on wheat imports, reflecting another good domestic harvest.

Food security of vulnerable groups improved

The food security situation of vulnerable groups has improved this year mainly as a result of the record harvest. The number of people requiring humanitarian assistance has decreased from about 445 000 in 2008/09 to some 111 000 in 2009/10. These are mostly small-scale farmers who lost their crops to floods or were adversely affected by dry spells early in 2009.

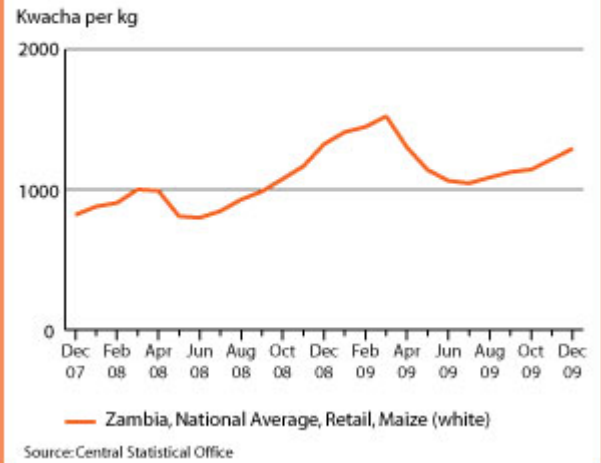
Zambia

Retail wheat and rice prices



Zambia

Retail maize price



Reference Date: 21-January-2010

FOOD SECURITY SNAPSHOT

- Prospects for 2010 maize crop mostly favourable so far
- A record maize crop was harvested in 2009
- Overall food supply satisfactory but maize prices have increased in recent months, and remain still above normal
- Pockets of food insecurity remain especially in areas affected by earlier flooding

Conditions of main season 2010 maize crop good overall, larger plantings

Planting of summer cereal crops (mostly maize) were completed by end December under normal conditions in all areas, except southern parts of the country where rainfall was below average and erratic. Overall, crop conditions are mostly favourable so far. In southern parts, where dry conditions were reported in December received rains in the first and second dekad of January and now crops are now reported to be performing well with few exceptions. Fresh maize is already available in the markets. The number of farmers benefiting from the distribution of Government subsidized inputs has increased from the previous year and larger plantings of maize and other crops were expected also because of favourable prices. But final outcome depends on crops throughout the country receiving needed moisture in the remainder of the growing season.

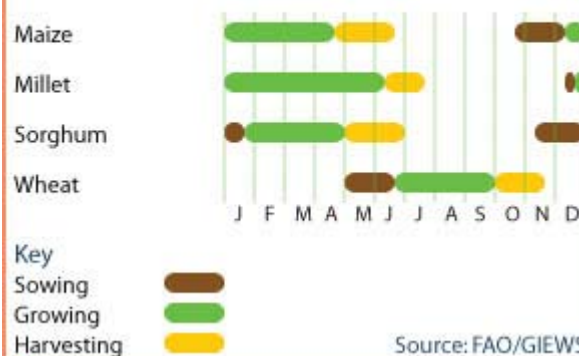
Record maize crop recorded in 2009

The 2009 maize harvest, completed earlier in the year, was a record 1.89 million tonnes, 31 percent above the previous year's level and 50 percent above the five year average. Estimates for wheat production for 2009, recently harvested, indicate an increase of 5 percent over last year's output primarily on account of an expansion in the area planted. Well distributed rainfall, combined with the Government fertilizer subsidy distributions and relatively attractive price offered to farmers at planting time contributed to the bumper cereal harvest in 2009.

Food security situation favourable overall, but despite increased market supplies, maize prices remain above average

At national level the food security situation is favourable with ample supplies of maize until the next harvest. The record 2009 crop has resulted in a maize surplus of some 200 000 tonnes in the 2009/10 marketing year (May/April) of which some 100 000 tonnes were to be exported, but these have not yet materialized. With the lean season approaching supplies in the market have diminished and prices have started to climb, a normal development at this time of the year. However the increase this year has been modest compared to the previous year. Small-scale farmers have depleted their own stocks and will have to rely on the market to meet their consumption requirements. Supplies are available from the Government Food Security Reserve (FSR) and private traders, but poorer household in chronically food insecure areas may have difficulty in accessing food from the market.

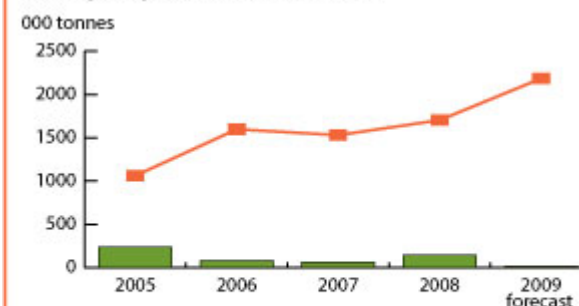
Crop calendar Zambia



Zambia Cereal production and imports

Cereal production	2004-2008	2008	2009	change*
	average		forecast	2009/2008
	000 tonnes			percent
Maize	1263	1446	1889	30.7%
Wheat	123	185	195	5.4%
Millet	36	39	49	25%
Other	31	34	52	53.4%
Total Cereals	1453	1704	2185	28.2%

* Percentage change calculated from unrounded data.

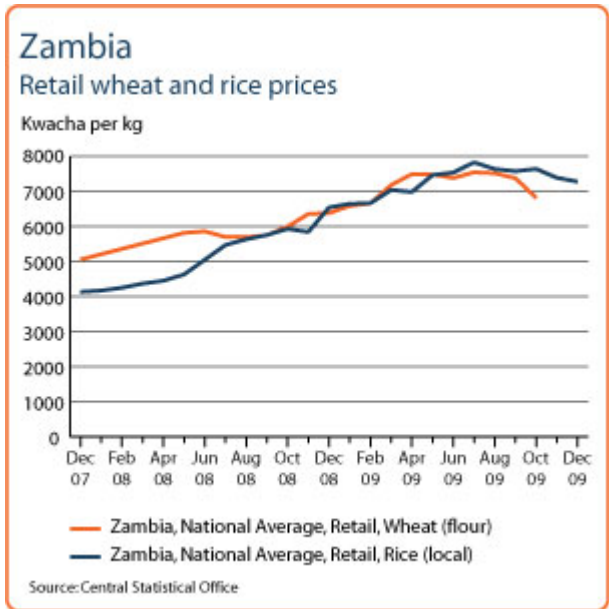


Source: FAO/GIEWS Country Cereal Balance Sheets

In spite of the increased domestic availability, the national average price of maize has remained high and has seasonally increased since last August, reaching MZK 1 290/kg in December, 24 percent higher than in July and 57 percent higher than in the same period in 2007. High transportation costs are some of the reasons for the relatively high maize prices in local markets this year. In contrast to maize, prices of wheat have declined in recent months, despite the ban on wheat imports, reflecting another good domestic harvest.

Food security of vulnerable groups improved

The food security situation of vulnerable groups has improved this year mainly as a result of the record harvest. The number of people requiring humanitarian assistance has decreased from about 445 000 in 2008/09 to some 111 000 in 2009/10. These are mostly small-scale farmers who lost their crops to floods or were adversely affected by dry spells early in 2009.



Reference Date: 01-September-2009

FOOD SECURITY SNAPSHOT

- Record maize harvest in 2009
- Maize prices remain very high
- Overall food security is improved due to generally good harvest but pockets of food insecurity exist especially in areas affected by flooding

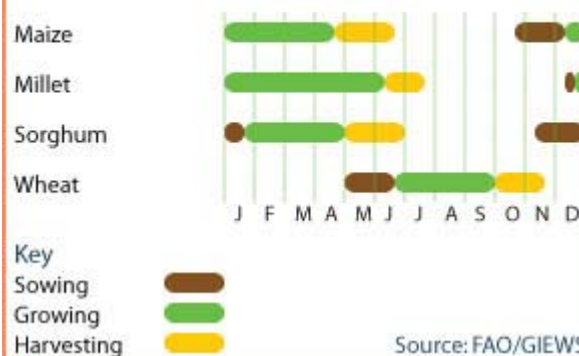
Record maize crop recorded in 2009

The official crop production estimates puts the 2009 maize harvest, completed earlier in the year, at 1.89 million tonnes, 31 percent above last year's level and 50 percent above the five year average. Estimates for wheat production for 2009, currently being harvested, indicate an increase of 5 percent over last year's output; primarily on account of an expansion in the area planted. Well distributed rainfall, geographically and temporally, combined with the Government fertilizer subsidy distributions also contributed to this bumper cereal harvest. Additionally, the number of beneficiaries under the fertilizer support programme increased to 200 000 in the 2008/09 season compared to 125 000 in the past season. The relatively attractive price offered to farmers at planting time, may have also contributed to the increase in production this season. The Government will continue to support small-scale farmers through a fertilizer programme in the 2009/10 agricultural season, but will increase the number of beneficiaries to 500 000. Planting of the main maize crop is scheduled to begin at the end of October.

Despite increased market supplies, cereal prices remain above average

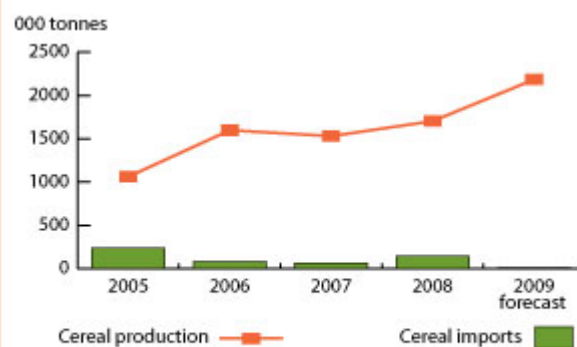
It is estimated that Zambia has a potentially exportable maize surplus of about 200 000 tonnes in the 2009/10 marketing year (May/April). However, owing to the concerns about high prices, the Government has only permitted 100 000 tonnes to be exported since the export ban was eliminated in July. In addition, the Government has maintained the ban on wheat imports in an initiative to support domestic production. In spite of the increased domestic availability, the national average price of maize has remained very high; the August 2009 price was 17 percent higher than the level one year ago and 69 percent higher than the same period in 2007. High transportation costs are also partly responsible for the high maize prices in local markets. In September 2008 the Government also raised farm gate buying price of white maize to ZMK 55 000 (USD 14) per 50 kg bag from ZMK 45 000, which is likely to have contributed to inflating prices this year. In addition, crop levies imposed on traders transporting produce across district boundaries is set to be abolished following a directive by the President. This should support an improvement in cereal trade from surplus to deficit regions.

Crop calendar Zambia



Cereal production and imports Zambia

Cereal production	2004-2008	2008	2009	change
	average		forecast	2009/2008
	000 tonnes			percent
Maize	1263	1446	1889	30.6%
Wheat	123	185	195	5.4%
Millet	36	39	49	25.6%
Other	31	34	52	52.9%
Total Cereals	1453	1704	2185	28.2%

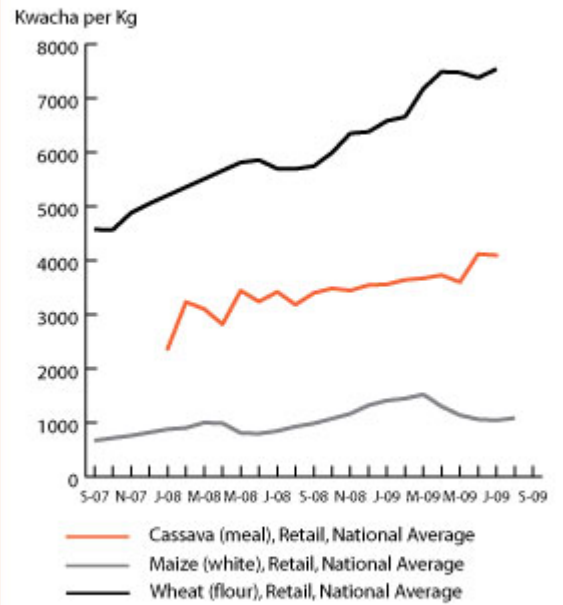


Source: FAO/GIEWS Country Cereal Balance Sheets

The overall food security situation improved

The overall food security situation remains stable, except for the vulnerable groups and farmers who lost their crops to floods or were adversely affected by dry spells. An estimated 110 651 affected people will require food assistance until harvesting begins in April.

Zambia Selected food prices



Source: Central Statistical Office