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What I got wrong about Zimbabwe's maize outlook

- Zimbabwe was one of the countries I worried would have a maize supply shortage in 2023. This was after data from the Pretoria office of the US department of agriculture showed that Zimbabwe's 2022/23 maize production would amount to 1.5-million tonnes, little more than half of the ample harvest of 2.7-million tonnes of the 2020/21 production season.
- While this would have been a minor improvement on the 2021/22 production season's maize harvest of 1.4-million tonnes, it would be 25% short of the country's annual maize need of about 2-million tonnes. I feared Zimbabwe would have to import about half a million tonnes to fulfil its annual need and another half million tonnes to replenish its grain reserves, since the Zimbabwe Grain Marketing Board is mandated to maintain a minimum of half a million tonnes of strategic maize reserve in physical stocks.
- Still, given the poor economic conditions in Zimbabwe I suspected that the board was unlikely to procure the half million tonnes strategic reserve in full within the 2023/24 marketing year (the marketing year corresponds with the 2022/23 production year). I therefore believed that at the very least imports would amount to about half a million tonnes. There are many countries Zimbabwe could rely on for imports, but neighbouring SA and Zambia are the usual suppliers in times of need.
- However, looking at Zimbabwe's maize imports from SA from May 2023 to the beginning of December, there are signs that import needs may be far lower than I anticipated. Over that period maize imports from SA amounted to only 164,123 tonnes. This is 67% lower than the amount I expected for the 2023/24 marketing year.
- Admittedly, the marketing year has not yet ended; we still have three months to go before it terminates at the end of April. Still, if the historical data is anything to go by, imports — at least from SA — will fall below the volume I expected. I don't have a clearer view of the figures out of Zambia, but I suspect they are also not significant. In addition, there is no clarity or published data on the maize import activities of the Zimbabwe Grain Marketing Board.
- I believe that together with my US department of agriculture colleagues we underestimated Zimbabwe's 2022/23 maize production and the opening stocks. Had we held a reasonably optimistic view on these, as did the country's agriculture ministry, we would have ended up with a different forecast. If the shortfall was as significant as we expected, there would be severe food shortages by now.

- After I shared my downbeat view on Zimbabwe's maize production outlook in 2023, Zimbabwean friends on social media, @X, were upset that I was so pessimistic about the conditions and pointed me to the government data. I ignored the Zimbabwean maize production estimates as the government there has a history of being "economical with the truth". But this time the government official projections appear to have come far closer to reality.
- Overall, nothing is terrible here. It is always good to be surprised to the upside on matters of food production forecasts. We all want the region to thrive and be food secure. Zimbabwe seems to have been in a slightly better position, assuming nothing unusual happens in the next three months.
- The outlook for the 2024/25 marketing year will depend on the crop now growing. I will comment on this later — and this time take the views of Zimbabwean government officials into account.

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<https://www.businesslive.co.za/bd/opinion/columnists/2024-01-10-wandile-sihlobo-what-i-got-wrong-about-zimbabwes-maize-outlook/>