OPINION / COLUMNISTS

WANDILE SIHLOBO: Zimbabwe improves but is likely to remain the region’s main maize importer

In SA the harvest is set to be well above needs of 12-million tonnes, with demand expected to remain strong

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by WANDILE SIHLOBO

Picture: 123RF

Maize demand in Southern Africa is expected to remain strong in the 2025/26 marketing year, which commenced in May (this marketing year corresponds with the 2024/25 production season).

One of the Southern African countries that imported a lot of maize in the 2024/25 marketing year was Zimbabwe, which accounted for 56% of SA’s 2.3-million tonnes of maize exports that year.

In the 2025/26 marketing year Zimbabwe’s maize demand is expected to be smaller but still substantial. The previous season presented unique challenges, primarily the midsummer drought, which led to a 60% decline in Zimbabwe’s maize production, leaving the country with a harvest of only 635,000 tonnes. This was far below the 2-million tonnes Zimbabwe required for its domestic annual consumption, and imports thus played a crucial role in meeting its domestic needs.

The current season has seen some recovery. Zimbabwe's maize production is forecast at 1.3-million tonnes, according to recent data from the Pretoria-based unit of the US department of agriculture, a little more than twice the output from the previous season. The recovery is primarily driven by improved weather conditions and an increase in the area farmers managed to plant. Still, Zimbabwe's potential maize harvest will be insufficient to meet the country's domestic needs, and the deficit will have to be imported.

In the most recent marketing year, SA supplied nearly all of Zimbabwe's maize imports. However, in the 2025/26 marketing year there may be some changes, with Zambia becoming an exporter again. Zambia, Southern Africa's second-largest maize producer, has seen a recovery in its 2024/25 maize production, now estimated at 3.66-million tonnes, up from 1.5-million tonnes in the previous season, according to Zambia's government data.

Similarly to Zimbabwe and SA, this increase in the harvest is due to favourable weather conditions and decent area plantings. This means Zambia could return to being a net exporter of maize, as its domestic maize consumption is about 2.8-million tonnes.

SA maize supplies are also expected to be robust, with the 2024/25 harvest estimated at 14.64-million tonnes, a 14% increase year on year. There is an increase in white and yellow maize. SA's relatively modest increase reflects that output damage during the 2024 drought period was more limited.

Improved seed cultivars, with relatively higher fertiliser usage and other interventions, ensured that SA's maize production decline last year was moderate. Importantly, the 2024/25 harvest seems likely to be well above SA's yearly maize needs of about 12-million tonnes, implying that SA will remain a net exporter of maize.

Zimbabwe is likely to remain one of the key beneficiaries, as we have already witnessed imports since the start of the marketing year in May. Still, we anticipate that the expected large volumes of imports may only materialise towards the end of the year or early in 2026. In the near term, Zimbabwe will probably rely on its own maize harvest.

The maize needs of the Southern Africa region for the 2025/26 marketing year are expected to be less severe than those witnessed in the 2024/25 marketing year, when Zambia's maize harvest was down by half and Zimbabwe's by 60%. There were also big losses in other countries, such as Mozambique, Lesotho and Malawi.

This time around the better weather conditions have supported production. Still, Zimbabwe is likely to remain the major maize importer in Southern Africa.

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