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Zimbabwe has formally lifted the maize import ban

- This morning, we received a note we had been hoping to receive for some time from the Zimbabwean authorities, informing us of their decision to lift the ban on the imports of maize into the country. Zimbabwe's Agricultural Marketing Authority stated, amongst other things, that: *"New Statutory Instrument (SI) 87 of 2025 on grains, oilseeds and products has recently been gazetted. The SI aims to: Open imports of maize, grains, oilseeds and products, thus removing the current ban on the importation of these."*
- The original rationale for placing the ban on maize imports was to support local farmers. The Zimbabwean authorities wanted to ensure that the maize millers and other users first procure the local supplies before looking to the world market. While this may look like a fair policy approach, it negates consumer welfare and creates uncertainty about the path forward. Notably, there was also no clear evidence that the country had sufficient locally produced maize supplies.
- In its recent post-harvest assessment for the 2024-25 season, the Zimbabwean government forecasts its maize harvest at 1.8 million tonnes. This is well above the estimate we have leaned on in our previous assessment, of 1.3 million tonnes from the Pretoria office of the United States Department of Agriculture (USDA). Admittedly, the Zimbabwean government has a history of being somewhat optimistic about its harvest estimates than the reality warrants. Thus, I suspect the actual harvest is perhaps close to the USDA's figure of 1.3 million tonnes.
- I say this because right after Zimbabwe announced a ban on its maize imports at the end of August, we learned of the shortages of maize that millers experienced. Had the country harvested 1.8 million tonnes, it would have been hard to imagine that news of shortages of maize supplies would have been announced that fast. The millers would have relied on the domestic supplies for some time and perhaps start running out of the local supplies at the end of the year and in the first quarter of 2026.
- Remember, Zimbabwe's annual maize needs are about 2.0 million tonnes; therefore, a harvest of 1.8 million tonnes would have been close to meeting the local needs. The fact that the shortages were experienced so quickly means that the shortfall was notable. Be that as it may, what is heartening to see now is that the Zimbabwean households will be able to access competitively priced maize from the world market, which should help in easing the domestic food price inflation. The likely suppliers of maize to Zimbabwe will be South Africa and Zambia.
- Already, from the start of September 2025, which was a period under the "maize import ban", maize exports from South Africa to Zimbabwe amounted to 65,090 tonnes. This led us to wonder if the ban was already quietly removed, and the recent announcement is now a formality. Still, having the formal

announcement out means that the flow of maize from the world market to Zimbabwe will continue with ease.

- Leaning towards the USDA's estimate that Zimbabwe's 2024-25 maize production is likely 1.3 million tonnes, we believe that the country's maize imports will be around 700,000 tonnes. This means for South Africa that the regional maize demand could be strong in the coming months, which is somewhat supportive of the domestic prices that have declined notably.
- South Africa's 2025-26 marketing year maize exports so far stand at 729,690 tonnes, which is far below the seasonal export forecast of 2.2 million tonnes. Zimbabwe accounts for 18% of these exports. The rest is spread across the Southern Africa region, including Venezuela, Sri Lanka, Taiwan, and Vietnam, amongst other importers.
- It is likely that with the formal lifting of the ban, Zimbabwe's share in South Africa's maize exports will increase. Zimbabwe is typically part of South Africa's maize markets, specifically for white maize exports for human consumption.