

Things are looking up for Zimbabwean agriculture

by Wandile Sihlobo

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Global grain market players and analysts depend on major organisations such as the International Grains Council and the US department of agriculture for production estimates.

However, these organisations could have an incorrect view of Zimbabwe's 2020/2021 grain production this time around. Both organisations forecast 908,000 tonnes, 17% higher than the previous season, which is still well below Zimbabwe's annual requirement of 1.8-million to 2-million tonnes. If correct, this would mean the country remains a net importer of maize until 2022.

However, the word from analysts on the ground, and official government production estimates, are far more bullish. On February 18 state-run newspaper The Herald noted that "this year's maize harvest is expected to surpass the 1.8-million tonnes recorded in the 2016/2017 season".

Admittedly, the government's agricultural estimates have a history of being more optimistic than market conditions warrant. Nevertheless, a cautiously optimistic view of Zimbabwe's 2020/2021 maize production and other agricultural activities is shared by the World Food Programme (WFP).

In its report of February 16, the WFP indicated that "Zimbabwe's crop area planted could be higher when compared to last season ... crop conditions are reported to be largely good in most parts of the country, with the maize crop reported to be at its early to late vegetative stage with the harvest likely to start in April".

Within a few days of the heavy rainfall brought by Cyclone Eloise to the Southern Africa region I wrote a post in my blog asking questions about Zimbabwe's 2020/2021 maize production prospects. The feedback from various analysts on the ground also made it clear that the conditions were far different from global organisations' estimates. Perhaps, in the revisions, which will be out later in February in the International Grains Council's case and in early March from the US department of agriculture, the picture will be more in line with what domestic players are reporting.

Cyclone Eloise brought heavy rains mainly in the Masvingo, Manicaland and Matabeleland provinces covering Zimbabwe's southeastern parts. These provinces are not the major maize producers. These are primarily the central to northern regions, including the Midlands and Mashonaland provinces (west, east and central).

If Zimbabwe's maize production surpasses 1.8-million tonnes as the government and local analysts expect, Zimbabwe could be nearly self-sufficient in the 2021/2022 marketing year. Notably, the improvement will probably be across all agricultural activities, not only maize. This is essential for household food security, and maize imports could fall notably from the 2020/2021 marketing year level, which I estimate will be nearly 1-million tonnes to meet annual needs.

If that is the case there will be implications for SA's maize market. Thus far one of the main drivers of prices in the 2020/2021 marketing year has been growing regional demand, primarily from Zimbabwe. If this demand is curtailed there will be less pressure on SA's maize supplies, which could lead to a softening of domestic maize prices, which ultimately bodes well for food price inflation.

These developments come at a time when available data — planting estimates and crop condition reports — suggest SA could have its second-largest maize harvest on record, at about 16.7-million tonnes (from 15.4-million tonnes in 2019/2020). On February 25 the crop estimates committee will release its first production estimate, which might confirm this optimism.

In sum, the 2020/2021 production season has so far been favourable, not just for SA but for most of Southern Africa, including Zimbabwe.

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