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Prepared By: Dirk Esterhuizen

Approved By: Oliver Flake

Report Highlights:

Following the challenging corn crop in the 2024/25 marketing year due to severe drought conditions, Zimbabwe's corn production is projected to more than double in the 2025/26 marketing year, benefiting from more favorable weather conditions. The Presidential Inputs Scheme has played a crucial role in supporting smallholder farmers by providing subsidized agricultural inputs, significantly contributing to an anticipated increase in production. Despite this improvement in local production, Zimbabwe is anticipated to continue importing corn, with imports expected to begin in the latter part of the 2025/26 marketing year. Corn ending stock levels are anticipated to stabilize around the mandated reserve levels.

Executive Summary

- **Corn Production Surge:** Zimbabwe's corn production is projected to more than double to 1.3 million metric tons (MMT) in marketing year (MY) 2025/26, attributed to favorable rainfall despite earlier dry spells and ongoing macro-economic challenges.

- **Higher Consumption:** Human consumption of corn, as well as feed corn, is expected to rise. Consequently, total domestic demand for corn in MY 2025/26 is estimated at 2.2 MMT, representing an 8 percent increase from MY 2024/25.

- **Continued Imports:** Despite the increase in local production, Zimbabwe will remain a net importer of corn, primarily as imports from South Africa are anticipated to commence in the latter part of MY 2025/26. The Ministry of Lands, Fisheries, Water, and Rural Development has recommended a temporary ban on cereal imports to prioritize local grain purchases.

- **Stabilized Stock Levels:** Corn ending stock levels are expected to stabilize at around 500,000 metric tons (MT) in MY 2025/26, in accordance with the mandated Strategic Grain Reserve.

Corn

***Table 1**: Corn Production, Supply and Distribution*

Corn	2023/2024		2024/2025		2025/2026	
Market Year Begins	May 2023		May 2024		May 2025	
Zimbabwe	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	1000	1000	900	900	1000	1000
Beginning Stocks (1000 MT)	128	128	428	428	513	363
Production (1000 MT)	1500	1500	635	635	1300	1300
MY Imports (1000 MT)	700	700	1600	1300	450	1000
TY Imports (1000 MT)	1250	1250	1150	1000	350	700
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	2328	2328	2663	2363	2263	2663
MY Exports (1000 MT)	0	0	0	0	0	0
TY Exports (1000 MT)	0	0	0	0	0	0
Feed and Residual (1000 MT)	300	300	400	400	250	450
FSI Consumption (1000 MT)	1600	1600	1750	1600	1700	1700
Total Consumption (1000 MT)	1900	1900	2150	2000	1950	2150
Ending Stocks (1000 MT)	428	428	513	363	313	513
Total Distribution (1000 MT)	2328	2328	2663	2363	2263	2663
Yield (MT/HA)	1.5	1.5	0.7056	0.7056	1.3	1.3

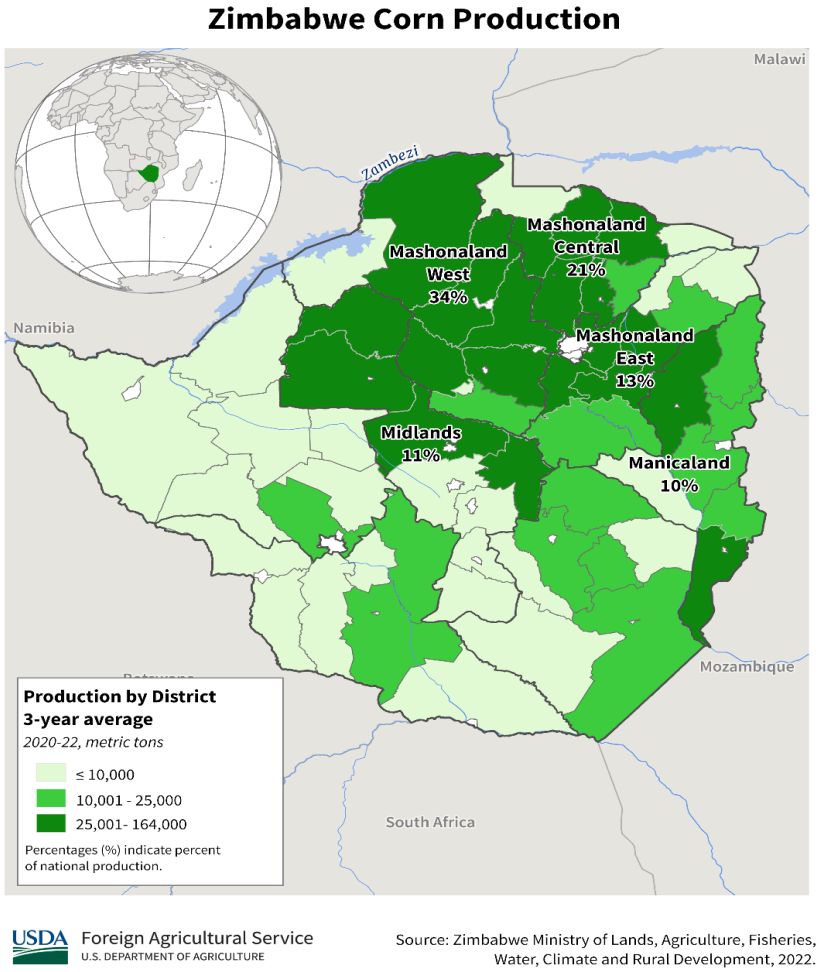
(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Corn begins in October for all countries. TY 2025/2026 = October 2025 - September 2026

OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query

Production

Zimbabwe's corn crop is projected to more than double to 1.3 MMT in MY 2025/26 (May 2025 to April 2026). The generally favorable rainfall performance, attributed to a stronger La Niña weather pattern in the second half of the production season, has benefitted crop development and resulted in improved outcomes compared to MY 2024/25. During MY 2024/25, a combination of El Niño-induced mid-summer drought and high temperatures led to poor yields. Despite erratic rainfall and extended dry spells earlier in the season that delayed plantings, particularly in the high-production northern regions, significant improvements from mid-December, with consistent and adequate rainfall, have enhanced plant growth. Consequently, anticipated yields in most of Zimbabwe's corn-producing areas are expected to reach near-average levels. However, water levels at Lake Kariba remain low despite recent improvements. This low level continues to disrupt power supply and irrigation availability in Zimbabwe.

Map 1: *Zimbabwe's Corn Production Areas*



Source: Maps are available in USDA/FAS's Crop Explorer

Zimbabwe's Fast Track Land Reform Program in the early 2000s significantly reshaped the agricultural landscape, leading to the emergence of smallholder and medium-scale farms and a reduction in large-scale commercial farms. This has resulted in a diversified agrarian structure with various land tenure systems, including freehold titles, leasehold titles, and communal land tenure.

Corn production in Zimbabwe is primarily conducted by communal farmers, who account for 60 percent of the corn cultivation area but produce less than 40 percent of the total output due to low yields. Farmers also have limited access to irrigation technologies, subsequently more than 90 percent of corn production is reliant on rainfall. The ability of farmers to optimize corn production is further hindered by ongoing macro-economic challenges and relatively high input costs, particularly for fuel and fertilizer. Zimbabwe imports most of its fertilizer, while frequent supply chain disruptions lead to market shortages and elevated prices. Consequently, corn yields in Zimbabwe have been significantly below optimal levels.

Nonetheless, the distribution of subsidized agricultural inputs through government support schemes has alleviated some of these costs, supporting communal farmers in continuing corn production. According to the Ministry of Lands, Agriculture, Fisheries, Water and Rural Development its main program, the Presidential Inputs Scheme, provided seed, fertilizer, and pesticides to approximately 3.5 million smallholder farmers during the 2024/25 production season.

Conducive rainfall during the season has also contributed to the spread of pests and diseases, such as Armyworm, which was present in all the provinces of Zimbabwe. The Zimbabwean government intervened by providing pesticides and sprayers to farmers.

The cultivation of genetically engineered (GE) corn in Zimbabwe is prohibited. The country does not permit the commercial release of GE seeds, citing health and environmental safety concerns. Zimbabwe has adopted a precautionary approach to the regulation of GE products and technologies, as evidenced by the National Biotechnology Authority Act of 2006. The country has permitted researchers to conduct trials for GE cotton, as legislation allows research up to the open quarantine or confined field trial level, which is regulated by the National Biotechnology Authority. While GE foods can be imported into Zimbabwe, the import of GE grains with the potential for local production is not allowed. However, in times of severe drought or food shortages, and when non-GE grains cannot be secured for food, the country permits the import of GE grain.

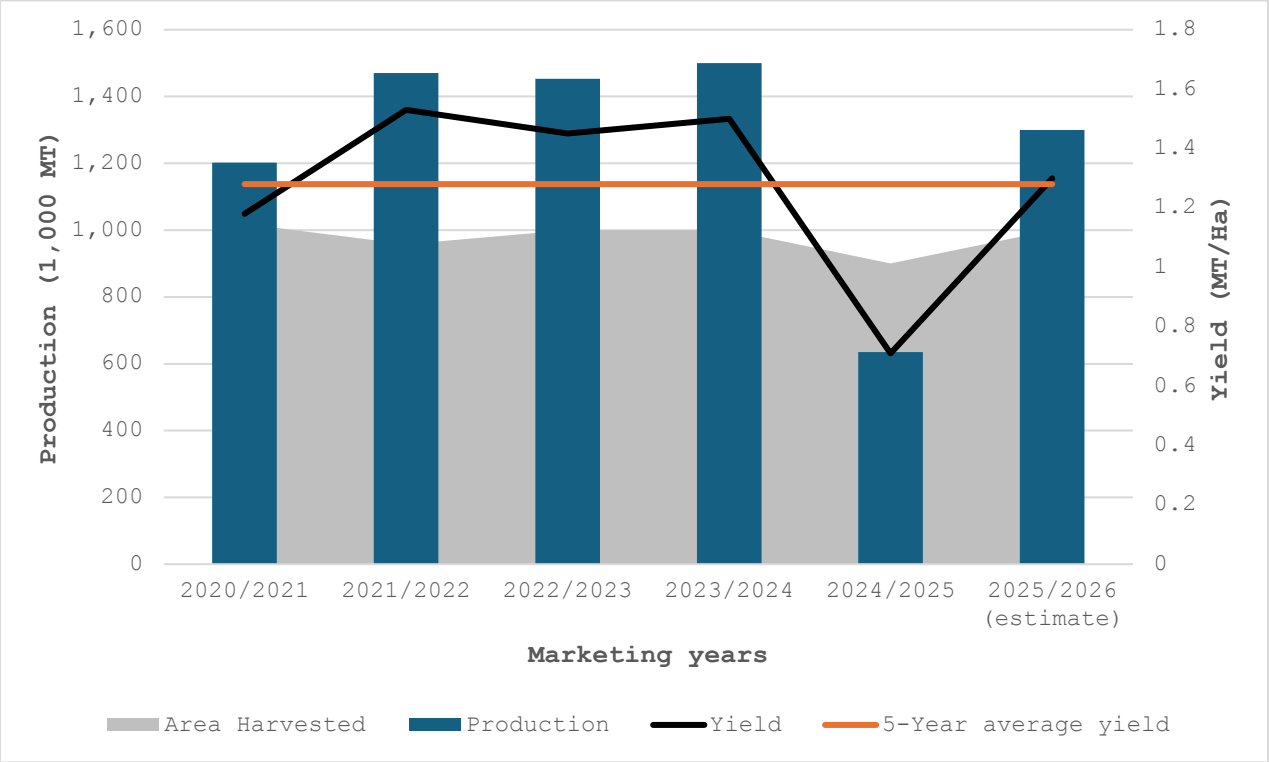
Table 2 indicates the area harvested, yield, and production of corn in Zimbabwe for the past three marketing years. The estimated average corn yield of 1.3 MT/Ha for MY 2025/26 is more than 80 percent higher than the previous marketing year's yield of 0.71 MT/Ha and is in line with the 5-year average yield (see Figure 1).

Table 2: *Area harvested, yield, and production of corn in Zimbabwe*

Marketing Years	Area planted (1,000 Ha)	Area harvested (1,000 Ha)	Yield (MT/Ha)	Production (1,000 MT)
2023/24	1,966	1,000	1.50	1,500
2024/25	1,778	900	0.71	635
2025/26 (estimate)	1,840	1,000	1.30	1,300

Source: Foreign Agricultural Services, United States Department of Agriculture

Figure 1: *Zimbabwe's Corn Production and Yield Trends*



Source: Foreign Agricultural Services, United States Department of Agriculture

Consumption

White corn is highly important in Zimbabwe, serving as the national staple food and the primary source of carbohydrates for the population, mainly consumed as porridge called "sadza." In contrast, the livestock industry predominantly utilizes yellow corn for animal feed production.

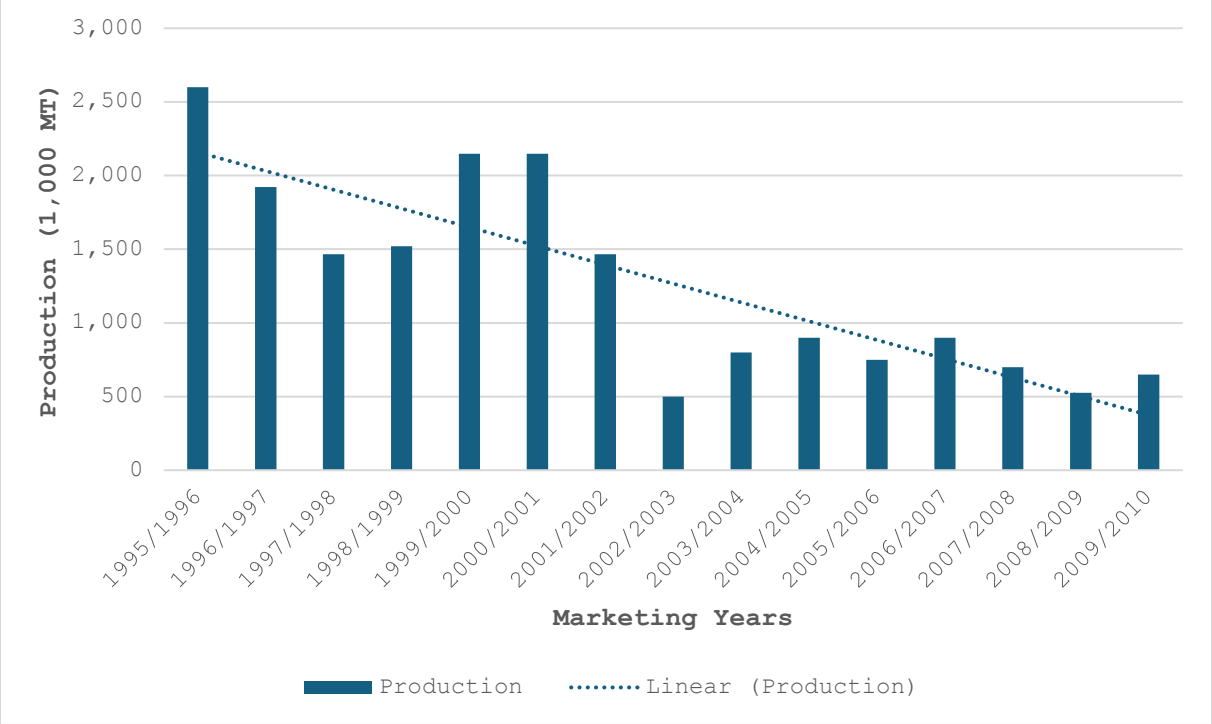
Projections indicate that human consumption of corn will increase by 6 percent, reaching 1.7 MMT in MY 2025/26, attributed to improved availability of locally produced corn. Concurrently, with anticipated growth in beef, dairy, broiler, and egg production, the demand for feed corn is expected to rise by more than 10 percent, reaching 450,000 MT in MY 2025/26. Consequently, Zimbabwe's total domestic demand for corn in MY 2025/26 is estimated at 2.2 MMT, reflecting an 8 percent increase from MY 2024/25.

In MY 2024/25, high food prices driven by drought conditions and a struggling domestic economy impeded any growth in the demand for corn for human consumption. As a result, the Foreign Agricultural Service in Pretoria (FAS/Pretoria) estimates that corn consumption remained stable at 1.6 MMT in MY 2024/25. Conversely, the demand for feed corn is estimated to have grown to 400,000 MT in MY 2024/25. This increase was necessary to support supplementary feeding to maintain the national cattle herd in fair condition, as grazing was limited due to the drought.

Trade

FAS/Pretoria anticipates that Zimbabwe will import approximately 1 MMT of corn to meet local demand in MY 2025/26. This represents a reduction of nearly 25 percent compared to MY 2024/25, attributed to higher local production driven by more favorable weather conditions. Despite this reduction, Zimbabwe remains a net importer of corn, a status that has persisted since the early 2000s following aggressive land reform policies introduced by the former president, which disrupted productivity and significantly diminished agricultural output (see Figure 2).

Figure 2: *Corn Production in Zimbabwe (1995 – 2010)*



Source: Foreign Agricultural Services, United States Department of Agriculture

Corn imports are expected to commence in the latter part of MY 2025/26 after local production supplies diminish, with most imports likely originating from South Africa, which has approximately 1.5 MMT available for export. Though Zimbabwe's corn import duties are set at zero, the Ministry of Lands, Fisheries, Water, and Rural Development has recommended a temporary ban on cereal imports to prioritize local grain purchases, a move that has been met with enthusiasm from local farmers.

In MY 2024/25, Zimbabwe imported 1.3 MMT of corn due to elevated demand following a drought-stricken season. Most of the corn was imported from South Africa, including 835,000 MT of white corn and 440,000 MT of yellow corn. Additionally, the United States exported about 30,000 MT to Zimbabwe after successful discussions with the local Grain Miller's Association. Zimbabwe permitted genetically engineered (GE) corn imports in MY 2024/25. However, strict quarantine procedures and supervised milling were required before it could be

used for human consumption. In MY 2023/24, Zimbabwe imported an estimated 700,000 MT of corn, with approximately 640,000 MT originating from South Africa.

The Zimbabwean government has introduced new local marketing rules for crops in the MY 2025/26 season, marking a deliberate policy move to deepen the liberalized, competitive domestic grains and oilseeds marketing system. Previously, the sale and price of corn were largely controlled by the government. The new system addresses five farmer categories: smallholder farmers in the Presidential Input Scheme; self-financed farmers; private contractor-financed farmers; those financed by the Agricultural and Rural Development Authority; and those in the National Enhanced Agriculture Productivity Scheme.

Farmers in the Presidential Inputs Scheme must deliver to the Grain Marketing Board (GMB) while for the other categories, the GMB acts as a buyer of last resort, ensuring market prices meet or exceed the GMB price. The GMB has set incentive producer prices for corn, traditional grains, and oilseeds, applicable only to crops delivered to the GMB, with local corn currently bought at US$376.48/MT.

Stocks

The GMB is tasked with managing Zimbabwe's Strategic Grain Reserve (SGR), which plays a crucial role in ensuring national food security by maintaining adequate grain stocks to address potential shortfalls or disruptions in the food supply. The GMB is mandated to maintain a minimum strategic reserve of 500,000 MT of grain, representing about 3 months of local consumption, with corn constituting the majority.

The GMB operates 89 depots across the country, including 12 silo structures, with a total storage capacity of 4.5 MMT. Zimbabwe's corn end-stock levels are expected to stabilize around 500,000 MT in MY 2025/26, in accordance with the mandated SGR, after falling below the required levels in MY 2024/25 due to drought conditions.

Attachments:

No Attachments