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Report Highlights:

Zimbabwe's corn production is projected to recover significantly in Marketing Year 2026/27, driven by favorable La Niña rainfall patterns and increased area. Yields are expected to reach five-year average levels despite a challenging mid-season dry spell. Total domestic corn demand is estimated to increase, supported by rising human consumption and strong growth in broiler, egg, beef, and dairy production, which drives feed demand. Despite improvements in domestic production, Zimbabwe is anticipated to continue importing corn to meet local demand, as productivity remains relatively low compared to neighboring corn-producing countries. However, corn imports are expected to decline by 25 percent, reflecting significant policy changes that impose stricter controls on grain and oilseed imports and require millers and processors to source at least 40 percent of their supplies locally beginning in April 2026.

Executive Summary

- **Production:** Zimbabwe's corn production is projected to recover significantly to 1.8 million metric tons (MMT) in Marketing Year (MY) 2026/27, representing a 38 percent increase from the previous marketing year. This recovery is driven by favorable La Niña rainfall patterns, expanded area, and yields expected to reach five-year average levels despite a challenging mid-season dry spell.
- **Consumption:** Total domestic corn demand is estimated to increase by 7 percent to 2.3 MMT, underpinned by a 6 percent rise in human consumption and strong growth in broiler, egg, and dairy production, which is driving feed demand upward by more than 10 percent.
- **Trade:** Despite improved domestic production, Zimbabwe is anticipated to continue importing corn, though import requirements are projected to decline by 25 percent to 600,000 metric tons (MT).
- **Stocks:** Ending stocks are forecast to increase by 32 percent in accordance with Strategic Grain Reserve mandates, supported by an ongoing national grain storage modernization program aimed at doubling storage capacity to 1.5 MMT.
- **Policy:** The implementation of Statutory Instrument (SI) 87 of 2025 represents a significant policy shift, mandating at least 40 percent local sourcing by millers and processors beginning in April 2026 and imposing stricter controls on grain and oilseed imports. This creates inherent tension between Zimbabwe's structural import dependence and its ambitious agricultural localization agenda.

Corn

Table 1: Corn Production, Supply and Distribution

Corn	2024/2025		2025/2026		2026/2027	
	May 2024		May 2025		May 2026	
Zimbabwe	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	900	900	1000	1000	1820	1400
Beginning Stocks (1000 MT)	428	428	363	363	513	313
Production (1000 MT)	635	635	1500	1300	1800	1800
MY Imports (1000 MT)	1300	1300	900	800	600	600
TY Imports (1000 MT)	1100	1100	700	700	500	500
Total Supply (1000 MT)	2363	2363	2763	2463	2913	2713
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)	400	400	500	450	500	500
FSI Consumption (1000 MT)	1600	1600	1750	1700	1850	1800
Total Consumption (1000 MT)	2000	2000	2250	2150	2350	2300
Ending Stocks (1000 MT)	363	363	513	313	563	413
Total Distribution (1000 MT)	2363	2363	2763	2463	2913	2713
Yield (MT/HA)	0.7	0.7	1.5	1.3	1.0	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 2026/2027 = October 2026 - September 2027

OFFICIAL DATA CAN BE ACCESSED AT: [PSD Online Advanced Query](#)

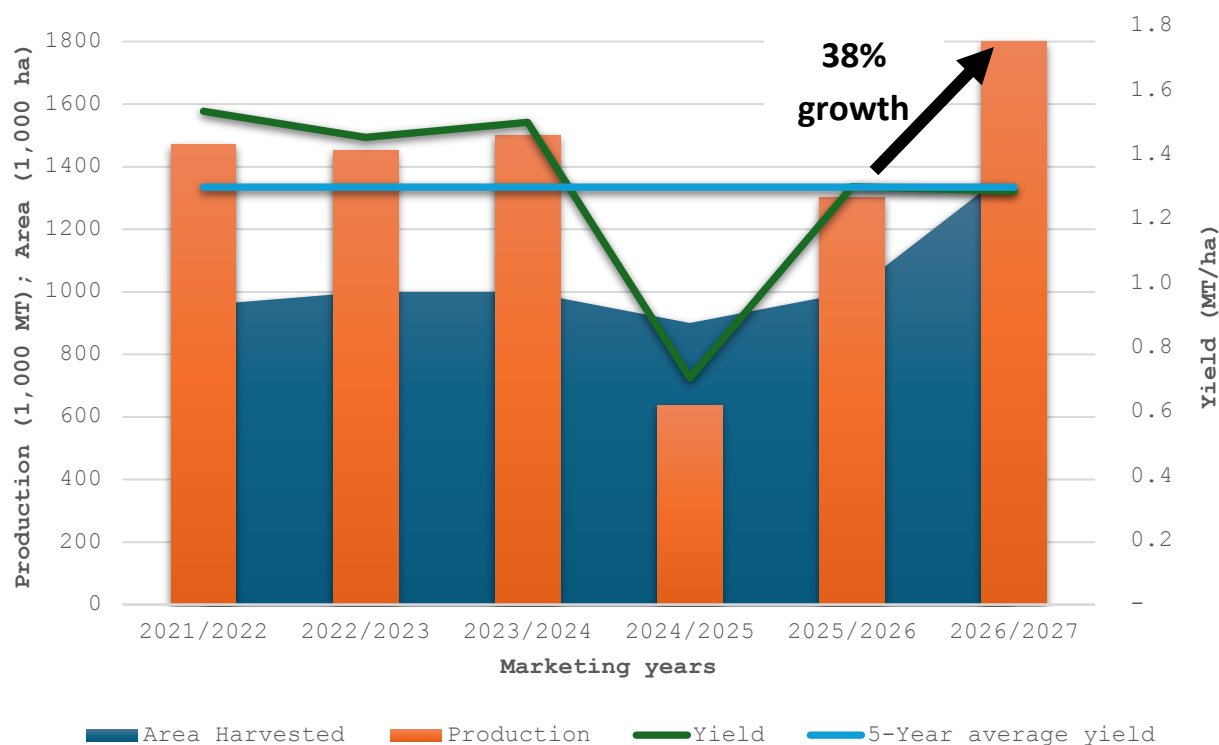
Production

Zimbabwe's corn production is projected to increase by nearly 40 percent to 1.8 MMT in MY 2026/27 (May 2026–April 2027). The 2025/26 growing season started favorably, with major corn producing regions receiving normal to above-normal rainfall from October through December 2025, attributed to a La Niña weather pattern. These conditions supported land preparation and planting activities, resulting in expanded corn area.

Intense and sustained rainfall in January 2026 across all ten provinces further supported agricultural production. Cumulative seasonal rainfall from October 2025 to January 2026 was above the seasonal averages in most regions, with higher precipitation recorded in the southern and southwestern regions of Zimbabwe. While the heavy rains caused some challenges—including nutrient leaching, waterlogging, and difficulties in weed control and fertilizer application, most crops thrived in favorable growing conditions.

However, a significant four-week mid-season dry spell accompanied by high temperatures from mid-January 2026 through mid-February 2026 negatively impacted the crops and resulted in wilting at critical physiological stages, particularly in the eastern parts of the country. Fortunately, decent widespread rainfall resuming in mid-February enabled crop recovery and supported grain development. Consequently, overall yields are expected to reach five-year average level of 1.3 metric tons per hectare (MT/ha) (see Figure 1).

Figure 1: Zimbabwe's Corn Production and Yield Trends



Source: [Foreign Agricultural Service, United States Department of Agriculture](#)

Table 2 presents the area harvested, yield, and production of corn in Zimbabwe over the past three marketing years. Zimbabwe's improved corn production outlook represents a significant recovery for the country's agricultural sector and food security situation. The concurrent improvement in [Lake Kariba's water levels](#) provides additional support for Zimbabwe's agricultural economy, as enhanced hydroelectric power generation could alleviate the chronic electricity shortages that have constrained both agricultural irrigation and processing. Higher rainfall has steadily improved water levels at Lake Kariba to 42 percent of usable storage capacity, compared to 17 percent one year ago.

The projected 1.8 MMT corn harvest would substantially reduce import requirements and strengthen domestic food availability. The combination of favorable La Niña conditions early in the season and timely rainfall recovery in mid-February proved critical to achieving average yields despite the challenging mid-season dry spell.

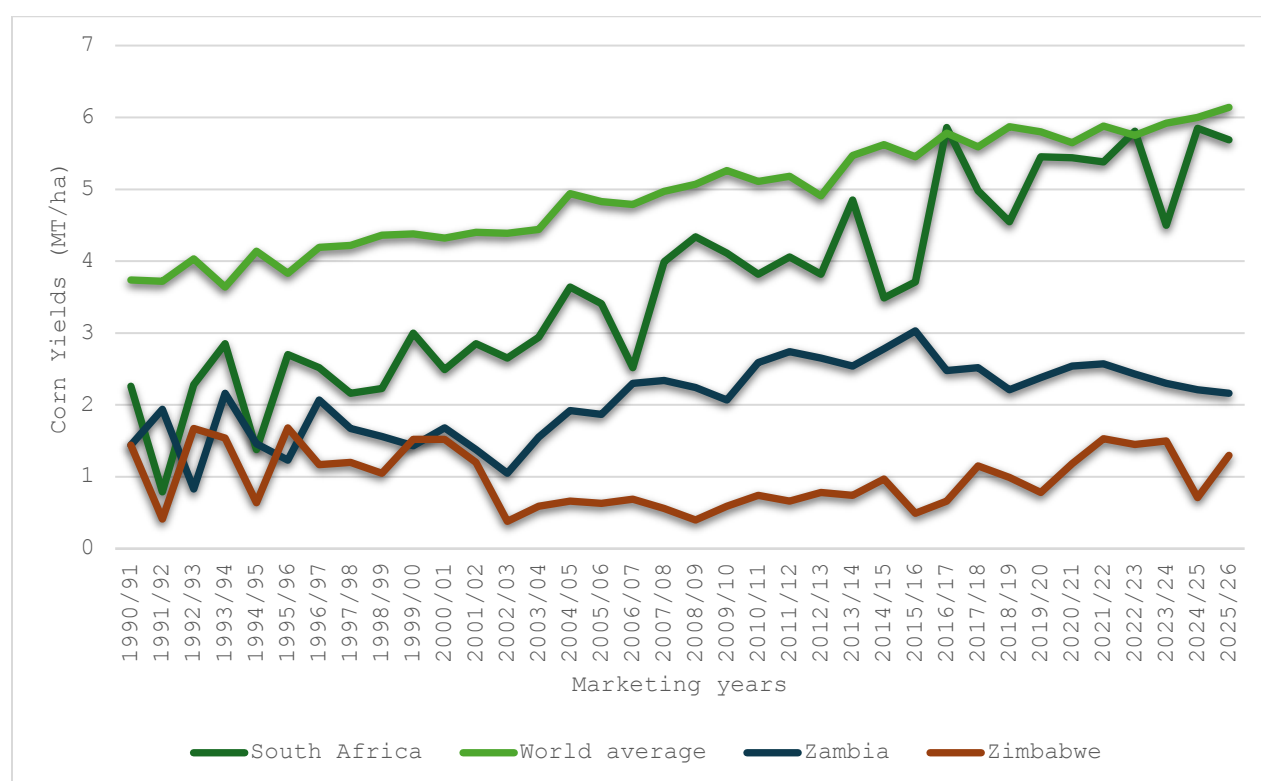
However, this yield level remains substantially below potential yields achievable under optimal conditions with adequate inputs, improved seed varieties, and enhanced agronomic practices. For comparison, commercial corn producers in neighboring countries such as South Africa and Zambia with similar agro-ecological conditions routinely achieve yields of 2-6 MT/ha or higher (see Figure 2).

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)
2024/25	1,778	900	0.7	635
2025/26	1,840	1,000	1.3	1,300
2026/27 (estimate)	1,915	1,400	1.3	1,800

Source: [Foreign Agricultural Service, United States Department of Agriculture](#)

Figure 2: Comparing Zimbabwe’s Corn Yields with Selected Countries



Source: [Foreign Agricultural Service, United States Department of Agriculture](#)

Zimbabwe's Fast Track Land Reform Program in the early 2000s fundamentally transformed the country's agricultural landscape, resulting in the emergence of smallholder and medium-scale farms and a corresponding reduction in large-scale commercial operations. This transformation produced a diversified agrarian structure characterized by multiple land tenure systems, including freehold titles, leasehold arrangements, and communal land tenure. Corn production is predominantly undertaken by small-scale and communal farmers, who account for approximately 90 percent of total corn production under rain-fed conditions. However, farmers' capacity to optimize corn production remains constrained by persistent macroeconomic challenges and relatively high input costs, particularly for fuel and fertilizer. Zimbabwe imports most of its fertilizer requirements, and frequent supply chain disruptions result in market shortages and elevated prices.

Nevertheless, the distribution of subsidized agricultural inputs through government support programs has partially offset these costs, enabling small-scale and communal farmers to sustain corn production. According to the Ministry of Lands, Agriculture, Fisheries, Water and Rural Development, its flagship initiative—the Presidential Inputs Scheme—provided seed, fertilizer, and pesticides to approximately 3.5 million smallholder farmers during the 2025/26 production season. In return, farmers participating in the Presidential Inputs Scheme must deliver their harvest to the state-backed [Grain Marketing Board \(GMB\)](#) at a predetermined price.

The cultivation of genetically engineered (GE) corn in Zimbabwe is still prohibited. However, field trials on GE cotton are ongoing. While GE foods may be imported into Zimbabwe, the importation of GE grains with the potential for local cultivation is not permitted. However, during periods of severe drought or acute food shortages, when non-GE grains cannot be secured, the government usually authorizes the importation of GE grains.

Consumption

White corn holds significant importance in Zimbabwe as the national staple food and primary source of carbohydrates for the population, predominantly consumed in the form of porridge. Conversely, the livestock industry relies primarily on yellow corn for animal feed production.

Projections indicate that human consumption of corn will increase by 6 percent to 1.8 MMT in MY 2026/27, driven by improved availability of locally produced corn. Simultaneously, robust growth in broiler and egg production, along with modest increases in beef and dairy production, is expected to drive feed corn demand upward by more than 10 percent to 500,000 MT in MY 2026/27. Consequently, Zimbabwe's total domestic corn demand in MY 2026/27 is estimated at 2.3 MMT, representing a 7 percent increase from MY 2025/26.

Zimbabwe's economy is classified as lower-middle income and is currently navigating a delicate phase of stabilization and recovery following decades of hyperinflation and infrastructure deterioration. Propelled by rebounds in agriculture, particularly tobacco, sugar, and poultry—and a surge in mining output of gold, platinum, and lithium—the country's Gross Domestic Product (GDP) expanded by 6.6 percent in 2025. For 2026, the International Monetary Fund (IMF) projects solid but moderate real GDP growth of 5 percent.

Despite recent economic progress, Zimbabwe continues to face significant development challenges including limited access to international financing, ongoing power shortages that constrain industrial production, and the need for substantial investment in transportation and irrigation infrastructure to support sustained agricultural productivity.

Trade

FAS/Pretoria anticipates that Zimbabwe will need to import approximately 600,000 MT of corn in MY 2026/27 to meet domestic demand and mandated strategic reserves. This represents a 25 percent reduction compared to the estimated 800,000 MT imported in MY 2025/26, attributed to higher local production driven by more favorable weather conditions.

Corn imports are expected to commence in the latter part of MY 2026/27 after local production supplies diminish. Most imports will likely originate from South Africa, which has approximately 3 MMT available for export, and possibly Zambia with an estimated 1 MMT surplus.

However, the Zimbabwean government frequently adjusts import policies to balance local farmer profitability with national food security needs. During surplus years, imports are restricted to protect local farmers and conserve foreign currency, while during deficit years, borders are reopened to meet food security needs.

For example, in August 2025, following a significantly improved harvest in the 2025/26 MY, the Ministry of Agriculture reimposed a ban on corn imports to ensure domestic millers bought from local farmers. However, just weeks later, mills experienced severe supply constraints as local production was lower than domestic needs. In October 2025, the government formally lifted the prohibition, allowing the resumption of corn imports.

Furthermore, on September 5, 2025, Zimbabwe's [Ministry of Lands, Agriculture, Fisheries, Water and Rural Development](#), under the [Agricultural Marketing Authority \(AMA\) Act](#), enacted SI 87 of 2025—a major policy shift—that tightens controls on grain and oilseed imports to promote domestic farming, curb speculative commodity trading, and achieve complete agricultural localization (see: [Zimbabwe tightens grain import rules to bolster food sovereignty](#), and [How SI 87 of 2025 could reshape Zim’s food supply chain](#)). Core provisions of SI 87 include:

1. Mandatory Local Sourcing Requirements

- **From April 1, 2026:** All millers, stockfeed manufacturers, and processors must source at least 40 percent of their annual raw material requirements locally
- **From April 1, 2028:** The domestic procurement threshold increases to 100 percent local sourcing (see [Government bans key imports: Millers to source 40% locally by April 2026, 100% by 2028](#)).
- **Targeted crops:** Maize, soybeans, sunflowers, and cotton.

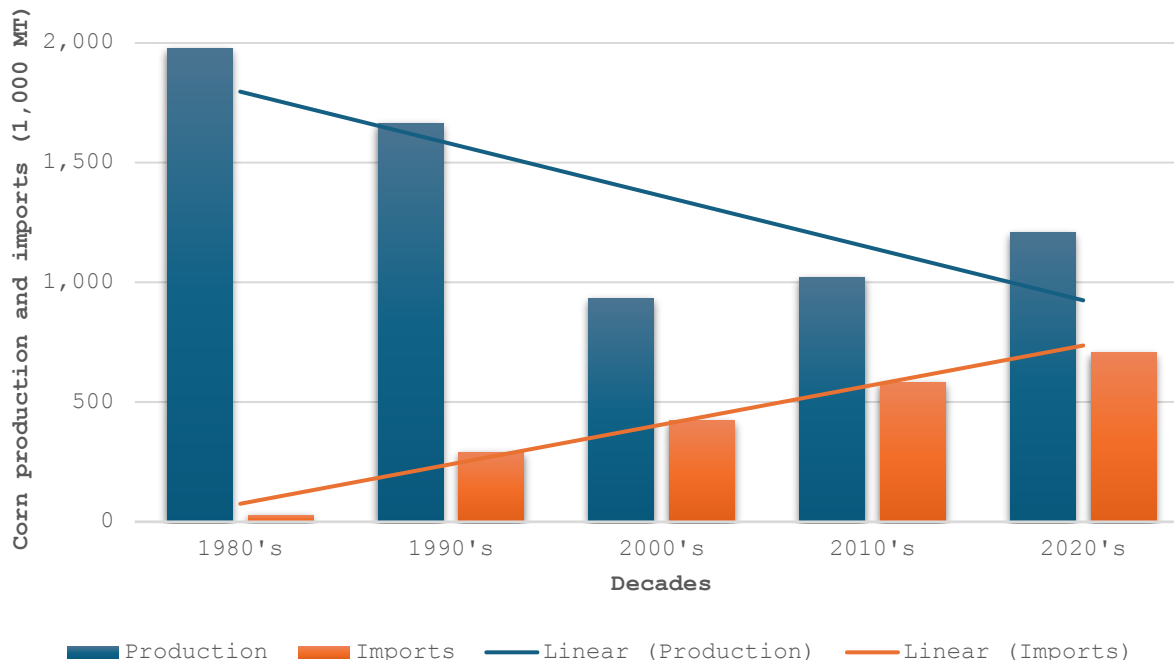
2. Import Restrictions and Tariffs

- **Imports restricted to certified need:** Under the new framework, the unchecked importation of grains and oilseeds is restricted. Imports are authorized by the AMA only under approved contracts in cases of critical domestic supply shortages.
- **Agricultural Revolving Fund:** If imported grain lands at a lower price than the government-determined local price, the price difference is collected as a tariff and paid into the Agricultural Revolving Fund to finance local smallholder farmer development.
- **Corn import tariff:** A baseline US\$10/MT levy is imposed on corn imports to balance cheaper imported grain against locally produced supplies. Policy debates continue over whether to increase the import levy to US\$40.00/MT in MY 2026/27, with farmers pushing for higher protection while private milling companies favor a lower import levy.

The government's primary goal with SI 87 of 2025 is to support local farmers who have long argued that cheaper imports flood the market and reduce their ability to sell at profitable prices. However, there's an inherent tension between Zimbabwe's structural dependence on imports, a status that has persisted since the early 2000s), and the aggressive localization mandates of SI 87.

Zimbabwe's import dependence represents a dramatic reversal from its historical position (see Figure 3). Following aggressive land reform policies introduced by the former president in the early 2000's, agricultural productivity was disrupted and output significantly diminished. Current production levels remain approximately 40 percent lower than those achieved in the 1980s. Zimbabwe, once considered the breadbasket of Southern Africa, now depends heavily on imports from South Africa to meet its food security needs, particularly for staple commodities such as white corn.

Figure 3: Zimbabwe's Yearly Average Corn Production and Imports per Decade



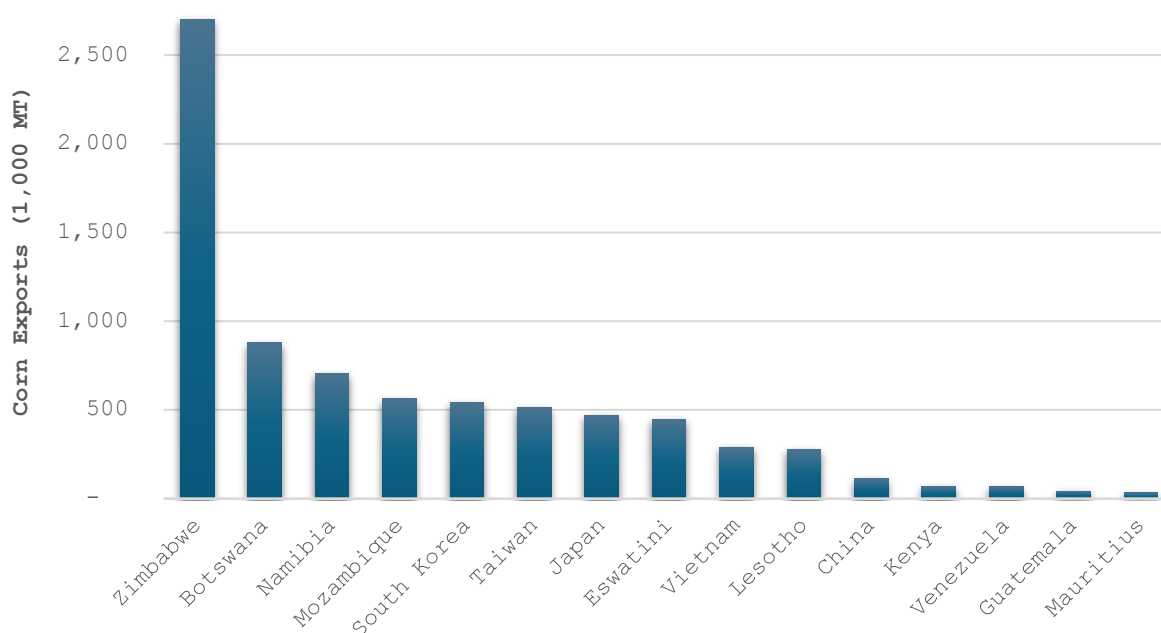
Source: [Foreign Agricultural Service, United States Department of Agriculture](#)

Over the past three marketing years, Zimbabwe imported a cumulative 2.7 MMT of corn from South Africa, establishing itself as South Africa's largest corn export market and accounting for 35 percent of total South African corn exports during this period (see Figure 4). Specifically:

- **In MY 2025/26:** Zimbabwe imported 780,000 MT from South Africa including 473,000 MT of white corn and 307,000 MT of yellow corn.
- **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 841,000 MT of white corn and 443,000 MT of yellow corn.
- **In MY 2023/24:** Zimbabwe imported an estimated 700,000 MT of corn, with approximately 640,000 MT originating from South Africa.

SI 87 represents a significant shift toward a more locally driven food system. Whether it becomes a success story or creates difficult adjustments will depend largely on how quickly Zimbabwe's agricultural sector can grow to meet demand.

Figure 4: South Africa's Cumulative Corn Exports over the Past Three Marketing Years



Source: FAS/Pretoria using data from the South Africa Grain Information Service ([SAGIS](#))

Prior to 2023, GMB held a legal monopoly over strategic grain trading under SI 145 of 2019, with all corn sold exclusively to the GMB at fixed, government-determined prices. In May 2023, the government gazetted SI 56 of 2023, which liberalized the market and officially designated the [Zimbabwe Mercantile Exchange \(ZMX\)](#) as an authorized agency to trade corn. This effectively dismantled the GMB's monopoly and shifted Zimbabwe toward transparent, market-driven pricing. Currently, the GMB's primary mandate is to manage the Strategic Grain Reserve (SGR) and act as a buyer of last resort. While it still sets "incentive producer prices" (US\$364.75/MT for corn in MY 2026/27), these function as a voluntary fallback baseline rather than mandatory pricing. Except for crops strictly funded by state initiatives, producers are no longer legally bound to sell to the GMB, and self-financed farmers can ignore GMB pricing if ZMX auctions offer higher returns.

The ZMX operates on a "willing buyer-willing seller" model where supply and demand dictate real-time value through weekly competitive auctions. The platform links private millers and processors directly with local commercial and smallholder farmers. ZMX officially launched its 2026 grain auction season on April 1, 2026. As of mid-May 2026, 3,800 MT of corn had traded, up from 3,200 MT the previous week. Current pricing stands at US\$350/MT for white corn and US\$335/MT for yellow corn (volume-weighted average), with a seasonal range of US\$335-US\$365/MT.

Farmers can deliver grain to certified GMB depots acting as ZMX-authorized warehouses. Digital warehouse certificates allow farmers to store their harvest securely and wait for favorable market prices rather than being forced into immediate sales.

Stocks

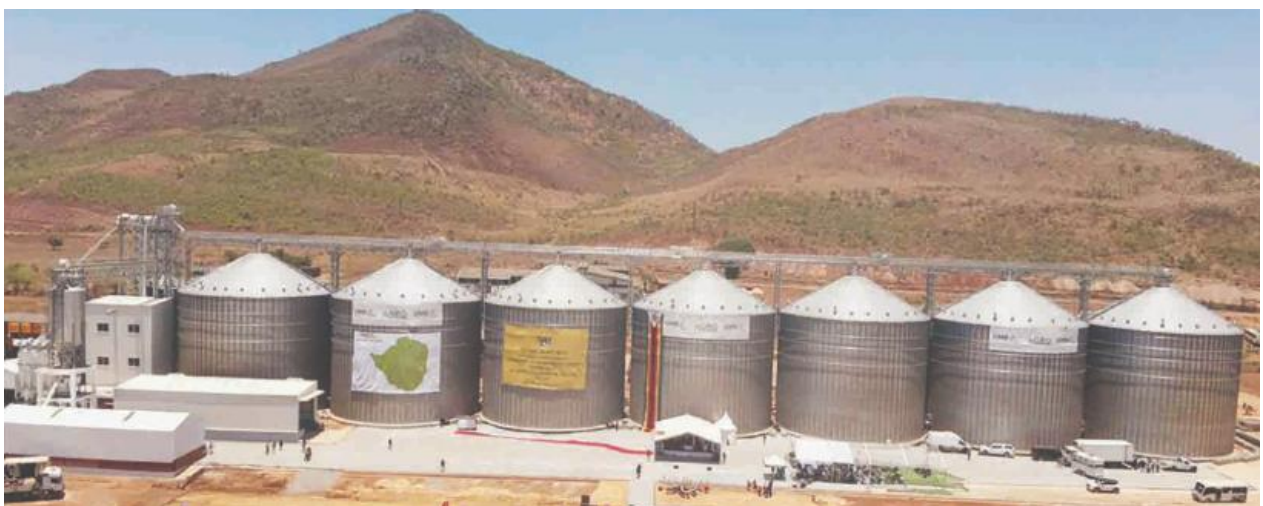
Zimbabwe's corn ending stock levels are projected to increase by 32 percent to approximately 413,000 MT during MY 2026/27, in line with the mandated SGR requirements.

The SGR serves as Zimbabwe's national food security mechanism. Its principal mandate is to safeguard the nation's food security against drought conditions by maintaining a mandatory minimum physical buffer stock of grains. Historically, the SGR has concentrated on white corn as the country's primary staple commodity. However, the government has strategically diversified the reserve's composition to enhance climate resilience. The stockpile now includes wheat and other grains such as sorghum and pearl millet, though corn remains the major commodity of the SGR.

Zimbabwe's national grain storage infrastructure is currently undergoing a comprehensive multi-year modernization initiative designed to double existing capacity. Under the GMB's leadership, this program aims to expand total national storage capacity from 750,000 MT to 1.5 MMT through the construction of 14 new modern silo complexes in key agricultural zones. Achieving the 1.5 MMT capacity target will enable Zimbabwe to securely store up to three years' worth of strategic grain reserves. To date, two silo complexes have already been completed at Kwekwe and Mutare with storage capacity of 56,000 MT, each of the seven silos comprising of 8,000 MT (see Figure 5). Another four are expected to start operating by the end of 2026. These facilities incorporate advanced technologies, including artificial intelligence systems, automated environmental controls, and integrated digital management platforms.

This infrastructure expansion represents a significant investment in Zimbabwe's agricultural resilience and food security architecture. According to the GMB, Zimbabwe seeks to restore its historical position as the "breadbasket of southern Africa" through such advanced agricultural infrastructure projects. Currently, the GMB operates a network of 75 depots nationwide, which includes 14 existing silo structures.

Figure 5: Artificial Intelligence-Powered Silo Complex in Mutare, Zimbabwe



Source: [The Herald](#)

Attachments:

No Attachments