



GIEWS Country Brief Botswana

Reference Date: 10-August-2022

FOOD SECURITY SNAPSHOT

- Cereal production in 2022 estimated at above-average level
- Cereal imports forecast to decline to below-average level in 2022/23
- Food prices increased in 2022, underpinned by elevated global prices

Cereal production in 2022 estimated above average

Harvesting of the 2022 main season cereal crops, consisting mostly of maize and sorghum, was completed in June. Cereal production is estimated at 80 000 tonnes, down from the bumper harvest in 2021 but still 22 percent above the five-year average, owing to an above-average cereal acreage. Crop yields are estimated at slightly below-average levels, as high temperatures and low rainfall amounts in January and February 2022 – an important period for grain development – created less-than-ideal conditions and curbed crop productivity. Water supplies and grazing conditions for livestock were reported to be satisfactory as of June across most of the country, except for the North East District.

Cereal imports seen to decline slightly in 2022/23

The country is a net importer of cereals, mostly maize and wheat, which on average satisfy about 70 percent of the domestic needs for both food and feed. Cereal import requirements in the 2022/23 marketing year (April/March) are forecast at 370 000 tonnes, an 8 percent decline compared to the five-year average level reflecting the large domestic production in 2022. Despite the forecast for reduced import quantities, the total import bill is expected to increase year on year in 2022/23, owing to the elevated global prices of cereals and energy. According to the latest data by Statistics Botswana, the value of cereal imports represented 20 percent of the total food bill in May 2022, compared to 15 percent in May 2021, primarily reflecting a significant increase in the cost of importing wheat, largely sourced from or through South Africa.

Food prices rise in 2022

The annual food inflation rate in June was estimated at 10 percent, up from 7 percent a year earlier. The upturn is mostly due to rising prices for transportation and food, reflecting high

Botswana

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Botswana

Cereal Production

	2017-2021 average	2021	2022 forecast	change 2022/average
	000 tonnes			percent
Sorghum	37	39	35	-4.4
Maize	25	67	40	59.5
Millet	3	3	5	45.7
Others	1	1	1	-16.7
Total	66	110	81	22.1

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

global prices and given the country's net importing status for foods and fuel. Prices of bread and cereals, which account for the largest share of an average person's calorie intake, increased by 9 percent in the 12 months to June 2022.

Localized pockets of food insecurity persist

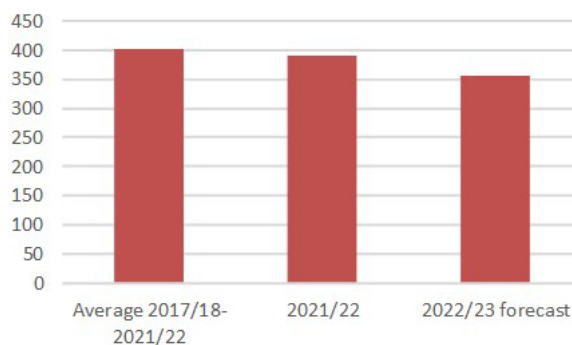
According to the latest Botswana Vulnerability Assessment Committee (BVAC) report, released in July 2022, almost 37 000 people are in need of food assistance until at least March 2023. The current prevalence of food insecurity is close to the number estimated in the previous year.

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Cereals Imports

000 tonnes



Notes: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.



GIEWS Country Brief Botswana

Reference Date: 03-September-2021

FOOD SECURITY SNAPSHOT

- Cereal production estimated at well above-average level in 2021, reducing import needs in 2021/22 marketing year
- Annual food inflation increased moderately in July 2021, reflecting high cereal prices
- Pockets of food insecurity persist in 2021/22, primarily due to effects of COVID-19 pandemic

Cereal production forecast well above-average in 2021

Harvesting of the 2021 cereal crops, mainly sorghum and maize, was completed in June and production is estimated at 110 000 tonnes, more than double the five-year average, reflecting an expansion in the planted area and above-average yields due to conducive seasonal rainfall. The favourable rainfall also benefitted vegetation conditions in rangelands and resulted in good pasture conditions across the country, which are expected to support an upturn in livestock production in 2021.

Planting of the 2022 cereal crops is anticipated to begin in November 2021 and early weather forecasts point to a higher-than-normal likelihood of above-average rains throughout most of the cropping season. This bodes well for production prospects next year, but also increases the risk of flooding and possible damage to crops.

Cereal imports decline in 2021/22

The country is a net importer of cereals, with more than 90 percent of the domestic requirements normally satisfied by imports.

In the 2021/22 marketing year (April/March), cereal import requirements are estimated to have decreased to a below-average level on account of the large 2021 harvest and a high level of carryover stocks. Reflecting the reduced import needs, the pace of maize imports in the 2021/22 marketing year has been slower than the previous year.

Moderate rise in food inflation in 2021

According to the latest data by Statistics Botswana, the annual food inflation rate in July 2021 was estimated at 6.5 percent. Rises in the price of bread and cereals, which have the largest weight in the food price index, were a primary contributor to the

Botswana

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Botswana

Cereal Production

	2016-2020 average	2020	2021 estimate	change 2021/2020
	000 tonnes			percent
Sorghum	29	30	39	29.3
Maize	12	15	67	349.3
Millet	3	4	3	-26.5
Others	1	1	1	0.0
Total	46	50	110	120.3

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

yearly increase, while there was a small increase in the price of oils and fats.

Pockets of food insecurity driven by effects of COVID-19 pandemic

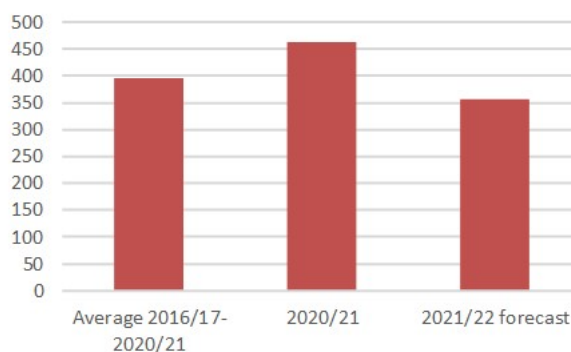
About 36 000 people are estimated to be food insecure in the April 2021-March 2022 period, marginally higher than the level in 2020/21. The small increase reflects the continued and adverse impacts of the COVID-19 pandemic on households' access to food, primarily due to the economic slowdown and a consequent increase in unemployment.

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Botswana

Cereals Imports

000 tonnes



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.



GIEWS Country Brief Botswana

Reference Date: 22-March-2021

FOOD SECURITY SNAPSHOT

- Cereal production forecast well above-average level in 2021
- Despite large output in 2020, cereal imports grew in 2020/21
- Prices of grains and cereal products higher year on year
- Pockets of food insecurity persist in early 2021 due to effects of COVID-19

Cereal production forecast well above-average in 2021

Planting of the 2021 cereal crops, mainly sorghum and maize, concluded in January and harvesting activities are expected to start in late April. Aggregate cereal production is forecast at 66 000 tonnes, about 40 percent above the five-year average. The favourable production outlook mainly reflects an expansion in the planted area and expectations of above-average yields owing to generally conducive rainfall between November 2020 and early March 2021.

The favourable rainfall also benefited vegetation conditions in rangelands across the country. Good pasture conditions are expected to support an upturn in livestock production in 2021.

Notwithstanding the positive effects of beneficial weather on the agricultural outlook, infestations of African Migratory Locust (AML) remain a risk to the 2021 production. In 2021, country reports indicate that AML swarms have increased between January and March in northwestern and northeastern parts where abundant rainfall have been conducive for insect breeding. However, assessments of the actual extent of the area affected and the damage caused to crops are not yet available.

Cereal imports grew in 2020/21

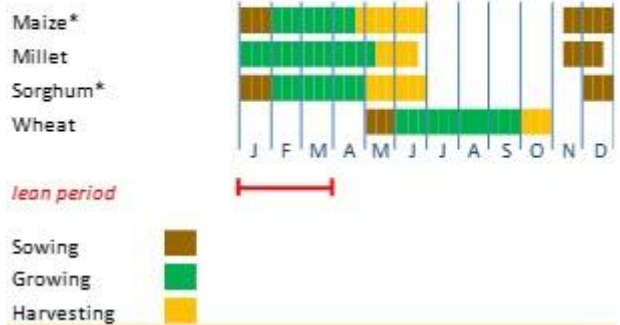
The country is a net importer of cereals, with more than 90 percent of the domestic requirements normally satisfied by imports. In spite of an above-average cereal output in 2020, estimated at 50 000 tonnes, cereal imports in the 2020/21 marketing year (April/March) increased year on year. The high imports, estimated at 465 000 tonnes, are about 20 percent above the previous five-year average.

Imports of maize, which normally account for the largest share of imports, are estimated at 290 000 tonnes. In particular, imports of

Botswana

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Botswana

Cereal Production

	2016-2020	2020	2021	change
	average		forecast	2021/2020
	000 tonnes			percent
Sorghum	29	30	40	33.3
Maize	12	15	20	33.3
Millet	3	4	5	25.0
Others	1	1	1	0.0
Total	46	50	66	32.0

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

white maize, which is used for food consumption, are estimated at 230 000 tonnes, about 35 percent above the average. Imports of yellow maize, mostly used for animal feed, are estimated at average 60 000 tonnes. The large import quantities of maize mainly reflect the country's drive to secure supplies and build up stocks amid concerns of the negative impact of the COVID-19 pandemic. In addition, a significant decrease in maize prices between May and August 2020 in South Africa, the country's main supplier of grains, supported a stronger import pace. Subsequently, prices in South Africa went back up to high levels and imports returned to normal volumes.

For the 2021/22 marketing year (April/March), cereal import requirements are anticipated to remain at an above-average level, but to decline on a yearly basis, reflecting increased availabilities from the larger 2021 harvest and a high level of carryover stocks.

Prices of cereals and cereal products higher year on year

According to the latest data by Statistics Botswana, the annual food inflation rate in February 2021 was estimated at 3.7 percent. Retail prices of bread and cereals, which have the largest weight in the food price index, increased steadily throughout 2020 and, in early 2021, they were estimated to be 7.5 percent higher year on year. The price gains largely reflect higher year on year prices of maize and wheat in South Africa.

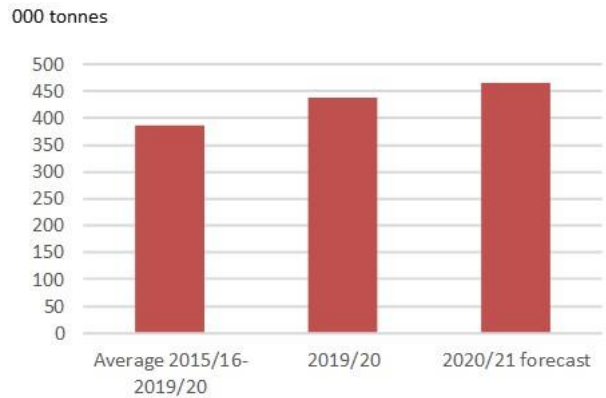
Pockets of food insecurity persist in early 2021 due to effects of COVID-19

About 38 000 people were estimated to be food insecure in the April 2020-March 2021 period, close to the number estimated in 2019/20. The unchanged prevalence of food insecurity, despite the larger agricultural output in 2020 reflects the adverse impacts of the COVID-19 pandemic on households' access to food, mostly resulting from income reductions as the national economy went into a sharp recession in 2020.

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Cereals Imports



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.



GIEWS Country Brief Botswana

Reference Date: 04-May-2020

FOOD SECURITY SNAPSHOT

- Cereal production forecast at above-average level in 2020, based on generally conducive weather
- Cereal import requirements rose in 2019/20, owing to steep decline in production in 2019
- As of March 2020, prices of bread and cereals slightly higher compared to year-earlier levels
- Pockets of food insecure people persist in early 2020, due to reduced agricultural production

Cereal production in 2020 forecast at above-average level

Harvesting of the 2020 cereal crops, mostly sorghum and maize, started recently and is expected to conclude in June.

Following a delayed start of seasonal rains, precipitation between November 2019 and April 2020 has been mostly conducive for crop development. As of early April, seasonal cumulative rainfall amounts were close to or slightly above the long-term averages and remote sensing data indicated overall favourable vegetation conditions, inferring to an upturn in yields in 2020 compared to the reduced levels in 2019. In southwestern and northwestern districts, however, rains were poorly distributed during the first quarter of 2020, with a likely negative impact on yields.

Based on the generally favourable rainfall conditions, the 2020 cereal production is forecast slightly above the average level.

The beneficial weather has also improved vegetation conditions in rangelands across the country, which were severely affected by extreme rainfall deficits in the previous year. The improved pasture conditions are expected to support an increase in livestock production in 2020.

Above-average cereal import requirements in 2019/20, following reduced output in 2019

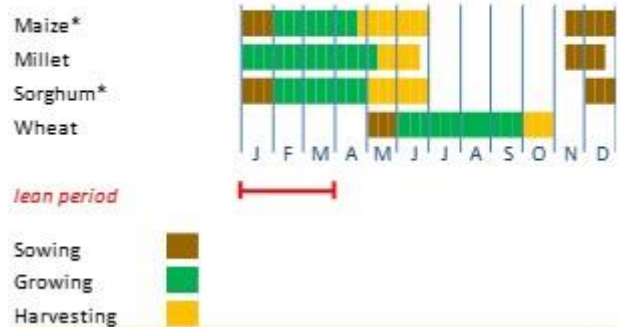
The country is a net importer of cereals, with more than 90 percent of the domestic requirements normally satisfied by imports. Cereal imports in the 2019/20 marketing year (April/March) increased to an estimated 440 000 tonnes, over 20 percent above the previous five-year average, partly reflecting the low domestic cereal harvest in 2019.

Imports of maize, which normally account for the largest share of imports, are estimated at 265 000 tonnes. In particular, imports of

Botswana

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Botswana

Cereal Production

	2014-2018 average	2018	2019 estimate	change 2019/2018
	000 tonnes			percent
Sorghum	25	49	5	-90.0
Maize	16	11	1	-90.8
Millet	4	6	1	-83.6
Others	1	1	1	0.0
Total	45	67	8	-88.2

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

yellow maize, which is used as animal feed, are estimated at nearly 80 000 tonnes, well above the average level of 45 000 tonnes per year. The steep increase reflects the deterioration of natural pastures in 2019 and, therefore, an increased need for supplementary feed. Wheat imports are estimated at nearly 120 000 tonnes, about 10 percent above the five-year average.

For the 2020/21 marketing year, cereal import requirements are expected to decrease on a yearly basis, but may remain at an above-average level.

Prices of bread and cereals increased moderately

According to the latest Consumer Price Index report from Statistics Botswana, the annual food inflation rate in March 2020 was estimated at about 3.5 percent. Prices of bread and cereals, which have the largest weight in the food price index, increased steadily throughout 2019 and early 2020, and were estimated to be 4 percent higher year on year in March 2020. The moderate increase mainly reflects the high prices of maize in South Africa, the country's main supplier of grains.

Pockets of food insecure people persist in early 2020, due to reduced agricultural production in 2019

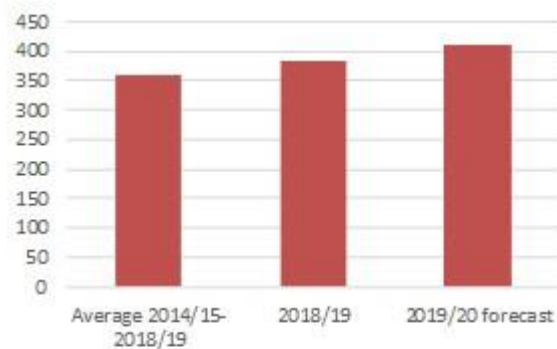
According to the Botswana Vulnerability Assessment Committee (BVAC), about 38 000 people were estimated to be in need of food assistance in the April 2019-March 2020 period, compared to an estimated 35 000 people in the previous year. The moderate increase is mainly due to the reduced 2019 cereal harvest and the deterioration of livestock body conditions, which particularly affected the livelihoods of subsistence farmers.

Looking further ahead, although an increase in cereal and livestock production in 2020 would improve food availability and ease access constraints to food for subsistence farmers, the risks posed by the COVID-19 pandemic could cause an increase in the prevalence of malnutrition at the national level. The effects of the pandemic are expected to be primarily channelled through a reduction in economic activities and associated income losses. A breakdown in supply chains, particularly in relation to trade disruptions with South Africa, which is the primary source of staple foods, would have sizeable impacts on the availability of food supplies in local markets.

Botswana

Cereals Imports

000 tonnes



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

COVID-19 and measures adopted by the Government

On 2 April 2020, a state of emergency was declared for an initial period of 28 days, but it was subsequently extended for an additional six months. Among the measures to contain the COVID-19 outbreak, international borders were closed, except for the arrival of national and legal residents, who are subject to a 14-day quarantine period, as well as for cargo and humanitarian shipments. The border closure has also impacted informal traders as the Government suspended the issuance of food import permits for 'hawkers' (street traders) at the end of March.

In addition, a national lockdown was implemented for an initial period of 28 days, subsequently extended until 7 May 2020 and only economic activities deemed essential were permitted to operate, including food production.

The Government also introduced measures to ease the economic burden on households and businesses during the lockdown. Wage subsidies were announced to safeguard jobs and tax payments have been postponed, while VAT refunds are being expedited. In addition, special credit schemes and rescheduling of loan payments are being implemented.

The lockdown restrictions are expected to be eased in phases, beginning from 8 May 2020.

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GIEWS Country Brief Botswana

Reference Date: 16-December-2019

FOOD SECURITY SNAPSHOT

- Unfavourable weather forecasts reduce production prospects of 2020 cereal crops
- Cereal production declined to well below-average level in 2019, driven by significant rainfall deficits
- As of October 2019, prices of bread and cereals slightly higher on yearly basis
- Food insecurity worsened in 2019 due to reduced agricultural production

Unfavourable weather forecasts reduce production prospects of 2020 cereal crops

Planting of the 2020 cereal crops started in November and it is anticipated to conclude by the end of December, with crops expected to be ready for harvest from next April. Since the beginning of the rainy season in October, precipitation amounts in the main producing areas have been sufficient to facilitate planting operations and support crop germination. For the coming December 2019-February 2020 period, weather forecasts indicate a higher probability of below-average to average rainfall, diminishing production prospects of the 2020 crop.

Cereal production in 2019 declined to well below-average level

The 2019 summer cereal crops (maize, millet and sorghum) were harvested by June. Overall, cereal production is estimated at a low level of 8 000 tonnes in 2019, about 82 percent below the previous five-year average. The principal factor for the significant decrease was the extreme rainfall deficits that adversely affected the harvested area and yields of the 2019 summer crops.

The dry conditions also had a negative impact on the livestock sector and caused a significant decrease in the availability and quality of grasslands, causing a worsening of livestock body conditions and increasing mortality rates.

Increased requirements for cereal imports in 2019/20

The country is a net importer of cereals, with more than 90 percent of the domestic requirements normally satisfied by imports. In consideration of the 2019 reduced output, import requirements are estimated to have increased in the 2019/20 marketing year (April/March) and are anticipated at an above-average quantity of over 410 000 tonnes. Most of this

Botswana

Crop Calendar (*major foodcrop)



Source: FAO/GIEWS.

Botswana

Cereal Production

	2014-2018 average	2018	2019 forecast	change 2019/2018
	000 tonnes			percent
Sorghum	25	49	5	-90.0
Maize	16	11	1	-90.8
Millet	4	6	1	-83.6
Others	1	1	1	0.0
Total	45	67	8	-88.2

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheet.

volume is comprised of maize, with imports forecast at 240 000 tonnes. By the end of November 2019, imports of yellow maize, which is primarily used for animal feed, were estimated to have already surpassed the total quantity imported during the entire previous marketing year, reflecting the deterioration of natural pastures in 2019 and, therefore, an increased need for supplementary feed.

Wheat imports are anticipated to reach 115 000 tonnes, about 10 percent above the five-year average.

Prices of bread and cereals slightly higher on yearly basis as of October 2019

According to the latest Consumer Price Index report from Statistics Botswana, the annual food inflation rate as of October 2019 was estimated at 2.3 percent. Prices of bread and cereals, which have the largest weight in the food inflation index, have been increasing since the beginning of the year and were estimated to be 3.5 percent higher year on year in October, mainly reflecting the higher prices in South Africa, the country's main supplier of grains.

Reduced agricultural production aggravates food insecurity

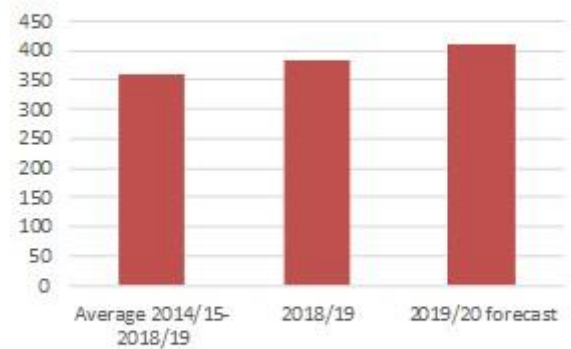
According to the Botswana Vulnerability Assessment Committee (BVAC), the number of people in need of food assistance is estimated to have increased slightly to 38 300 people in the April 2019 to March 2020 period, compared to an estimated 35 000 people in the previous year. The increase is due to the reduced 2019 cereal harvest and the deterioration of livestock body conditions, which negatively affected the livelihoods of the households, particularly those of subsistence farmers. The food insecure population is expected to be supported by Government programmes through, for example, the provision of urgent basic food relief packages.

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Botswana

Cereals Imports

000 tonnes



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.



GIEWS Country Brief Botswana

Reference Date: 27-September-2019

FOOD SECURITY SNAPSHOT

- Production prospects for 2020 crops and livestock mostly favourable, based on higher likelihood of beneficial seasonal rains
- Cereal production estimated to have declined to well below-average level in 2019, driven by significant rainfall deficits
- Prices of food increased moderately on yearly basis as of August 2019
- Food insecurity worsens in 2019/20 crop cycle due to reduced agricultural production

Favourable weather forecasts bode well for 2020 agricultural season

Planting of the 2020 cereal crops is expected to start in November and crops are likely to be ready for harvest in May next year. Weather predictions indicate a higher probability of average to above average rainfall during the 2019/20 cropping season, which could help instigate a recovery in crop production, as well as an improvement in pasture conditions and water availability for livestock.

Cereal production in 2019 declines to well below-average level

The 2019 summer cereal crops (maize, millet and sorghum) were harvested by June, while the winter wheat crop is expected to be harvested in October. Overall, cereal production is estimated at an extremely low level of 8 000 tonnes in 2019, about 82 percent lower than the previous five-year average. The principal factor for the significant decrease is the severe seasonal rainfall deficits that adversely affected the harvested area and yields of the 2019 summer crops, which account for the bulk of the national cereal output.

The dry conditions also had a negative impact on the livestock sector and caused a significant decrease in the availability and quality of grasslands, causing a worsening of livestock body conditions and increasing mortality rates.

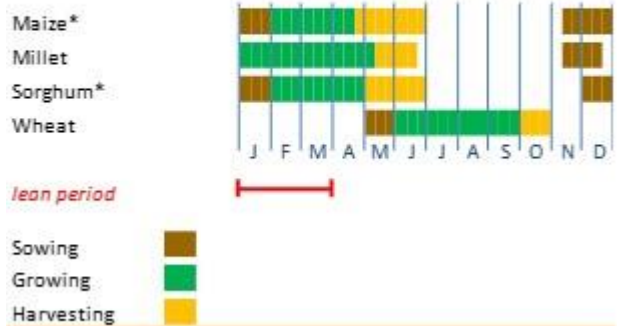
Increased requirements for cereal imports in 2019/20

The country is a net importer of cereals, with more than 90 percent of the domestic cereal requirements normally satisfied by imports. In consideration of the 2019 reduced output, import

Botswana

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Botswana

Cereal Production

	2014-2018 average	2018	2019 forecast	change 2019/2018
	000 tonnes			percent
Sorghum	25	49	5	-90.0
Maize	16	11	1	-90.8
Millet	4	6	1	-83.6
Others	1	1	1	0.0
Total	45	67	8	-88.2

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheet.

requirements are estimated to have increased in the 2019/20 marketing year (April/March) and are anticipated at an above average quantity of over 400 000 tonnes. Most of this volume is comprised of maize, with imports forecast at 230 000 tonnes, while wheat imports are anticipated to reach 115 000 tonnes.

Moderate uptick in food prices

The impact of drought conditions on domestic and regional food supplies has put some pressure on domestic food prices. As a result, there was a slight uptick in the annual food inflation rate, which was estimated at 2 percent year on year in August 2019, compared to a stagnant rate in August 2018. Most of the increase in 2019 reflects a rise in bread and cereal prices, which have the largest weight in the food inflation index.

Reduced agricultural production aggravates food insecurity

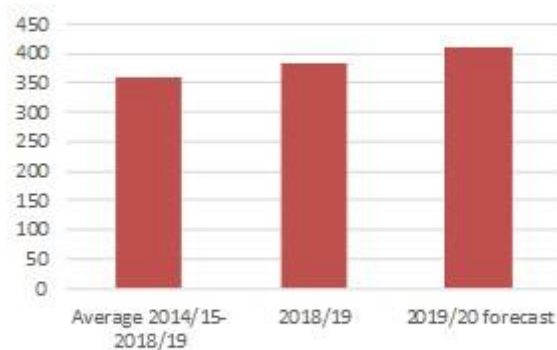
According to the Botswana Vulnerability Assessment Committee (BVAC), the number of people in need of food assistance is estimated to have increased slightly to 38 300 people in the April 2019 to March 2020 period. The small increase is due to the impact of drought conditions on agricultural livelihoods, particularly the losses of crops and livestock that adversely affected households' food supplies and income levels. The food insecure population is expected to be supported by Government programmes through, for example, the provision of urgent basic food relief packages.

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Botswana

Cereals Imports

000 tonnes



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.



GIEWS Country Brief Botswana

Reference Date: 11-October-2018

FOOD SECURITY SNAPSHOT

- Cereal production in 2018 estimated to have fallen from previous year's high level
- Prices of food declined moderately on yearly basis as of August 2018
- Food insecurity worsens in 2018 due to lower cereal output

Cereal production declined in 2018, but remained above average

Cereal production, mainly maize and sorghum, is estimated to have declined, on a yearly basis, to 64 000 tonnes, down 32 percent from the high output of 2017, but still well above average. The decrease was mainly caused by unfavourable weather conditions during the start of the year, a critical period for crop development, when reduced rains and higher-than-normal temperatures stunted crop growth. Improvements in weather conditions from late February helped crops recover and also led to a rejuvenation of pasture conditions. However, the mid-season dryness meant that estimated yields remained below the exceptional levels of 2017.

Imports to rise, but cereal supplies forecast to remain satisfactory in 2018/19

The country is a net importer of cereals with more than 90 percent of the domestic cereal requirements satisfied by imports. Total cereal imports are expected to slightly rise in 2018/19 and remain just below average, as larger opening cereal stocks, on account of the bumper 2017 output, curbed further increases in import requirements.

Food prices fall moderately

Food prices, measured by the food sub-index of the Consumer Price Index (CPI), were slightly down on a yearly basis as of August 2018. Despite higher prices of dairy products, fruits and vegetables, reduced prices of cereals and bread, which have the largest weight in the food sub-index, kept overall food prices lower.

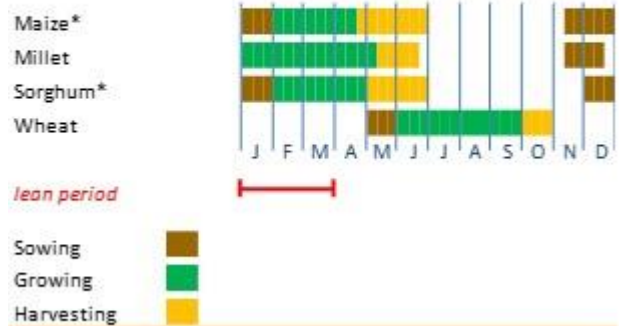
Reduced harvest aggravates food insecurity

According to the Botswana Vulnerability Assessment Committee (BVAC), the number of people affected by food insecurity in 2018 is estimated to have increased to approximately 35 000 people,

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Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Botswana

Cereal Production

	2013-2017	2017	2018	change
	average			2018/2017
000 tonnes				
percent				
Maize	19	45	21	-52.4
Sorghum	16	41	40	-2.4
Others	1	2	1	-50.0
Total	39	94	64	-31.5

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

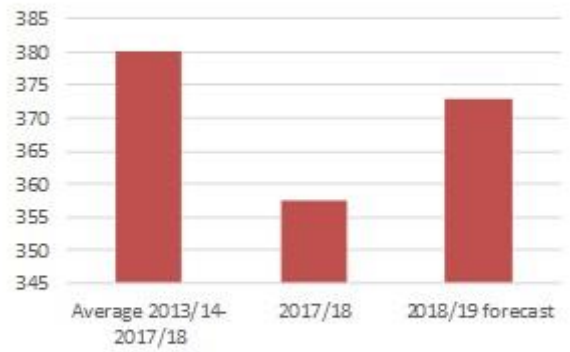
up from 12 000 in 2017. The increase is mostly reflective of the reduced cereal output in 2018, which mainly affected the food security situation of subsistence farmers.

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Botswana

Cereals Imports

000 tonnes



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.



GIEWS Country Brief Botswana

Reference Date: 21-March-2018

FOOD SECURITY SNAPSHOT

- Cereal production forecast to decline to well below-average levels in 2018, primarily on account of poor seasonal rains
- Food prices mostly unchanged on yearly basis as of early 2018
- Food security conditions expected to worsen in 2018 due to expected decrease in agricultural production

Poor weather expected to result in sharp cut to 2018 cereal production

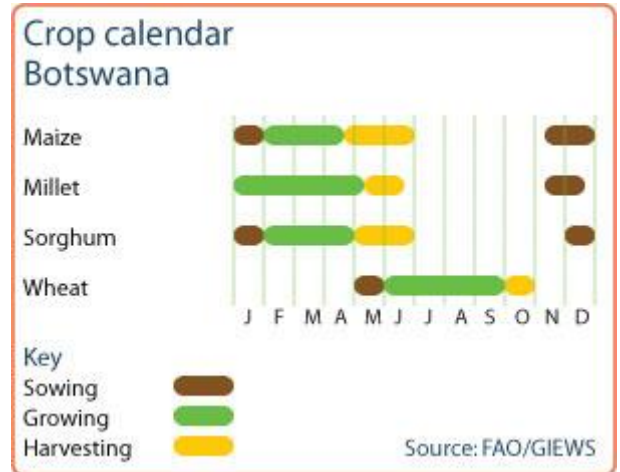
Harvesting of the 2018 cereal crops is expected to begin in April and cereal production is forecast to fall sharply to a well below-average level. The decline would mostly be on account of unfavourable weather conditions, reflecting an uneven temporal distribution of seasonal rainfall, lower cumulative quantities and higher temperatures in early 2018. Despite some improvement in weather conditions since February, the reduced rains earlier in the season resulted in a contraction in cereal plantings and are expected to restrain yield potential.

National food supplies forecast to remain stable in 2018/19

More than 90 percent of the domestic cereal requirements are satisfied by imports and the country imports on average about 375 000 tonnes of cereals, mainly wheat and maize, per year. In the 2018/19 marketing year (April/March), the country's reliance on imports, mostly from South Africa, is likely to increase moderately following the expected decline in cereal production. However, given the ample cereal availabilities in South Africa, domestic supply conditions in the 2018/19 marketing year are expected to remain stable.

Food prices firmed up, but cereal costs fell

The overall food price level, measured by the food and non-alcoholic beverages component of the consumer price index, was unchanged on a yearly basis as of February 2018. Despite the higher prices for meats, vegetables and confectioneries, lower prices for cereals and breads kept overall food prices stable.



Botswana
Cereal production

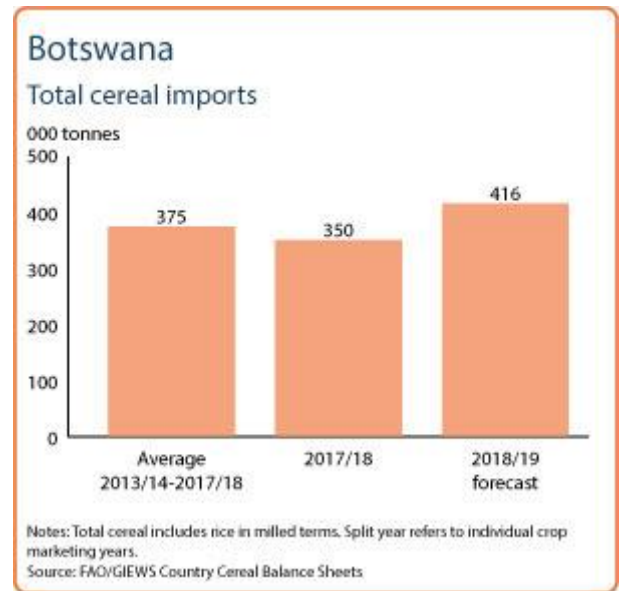
	2013-2017 average	2017	2018 forecast	change 2018/2017
	000 tonnes			percent
Maize	18	45	10	-78
Sorghum	16	41	8	-80
Millet	3	6	2	-67
Others	1	2	1	-50
Total	38	94	21	-78

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Food insecure numbers expected to rise in 2018

Although the food security situation is likely to seasonally improve as the new supplies from the 2018 harvest become available, the likely decrease in cereal production may result in higher numbers of food insecure compared to the reduced level in 2017. The Botswana Vulnerability Assessment Committee (BVAC) estimated that 12 000 people in 2017 required food assistance. The results from the BVAC's 2018 assessment are expected to be available in June.

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GIEWS Country Brief Botswana

Reference Date: 11-April-2017

FOOD SECURITY SNAPSHOT

- Cereal production forecast to rebound in 2017 owing to favourable weather conditions
- Food prices increased slightly in early 2017 on an annual basis
- Food security expected to improve following stressed conditions in 2016/17

Favourable seasonal rains expected to boost 2017 cereal production

Harvesting of the 2017 crops is expected to begin towards the end of April. On account of the favourable weather conditions, cereal production in 2017 is forecast to rebound from the sharply-reduced output of the previous year. Provisionally, cereal production is forecast at an above-average level in 2017.

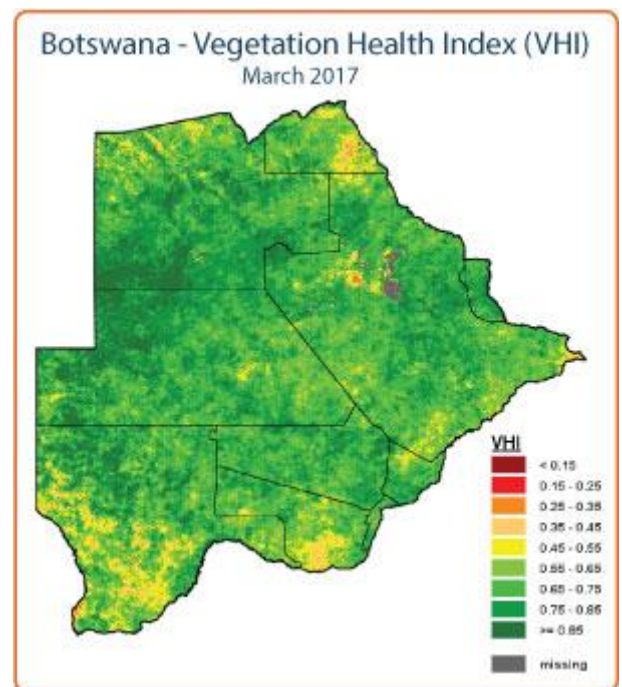
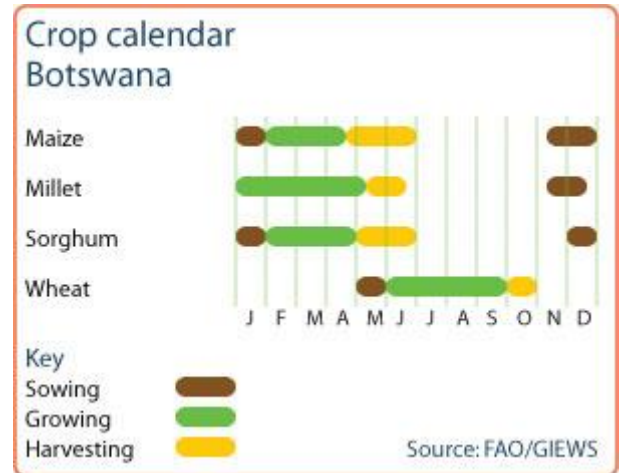
The good rains have rejuvenated pastures and water availability for animals, which were adversely affected by the prolonged and severe dryness in 2016, when livestock mortality averaged about 20 percent.

Food prices stable, but up on a yearly basis

Annual food prices, measured by the food and non-alcoholic beverages sub-index of the national CPI, were about 4 percent up on a yearly basis in February 2017. The increase partly reflects a moderate depreciation of the local currency against the Rand of South Africa, the country's main trading partner, with South African imports satisfying over 90 percent of the domestic cereal requirements.

Food security anticipated to improve

The food security situation is expected to improve in 2017/18, mainly reflecting the anticipated growth in agricultural production. This follows stressed conditions in 2016/17 due to the impact of the drought, when the Botswana Vulnerability Assessment Committee's 2016 evaluation estimated that approximately 1 million people were food insecure. The 2017 evaluation is expected to take place in May.



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Botswana

Cereal production

	2011-2015 average	2015	2016 estimate	change 2016/2015
	000 tonnes			percent
Maize	21	4	1	-75
Sorghum	18	3	3	0
Millet	3	1	0	-100
Others	1	1	1	0
Total	43	9	5	-44

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



GIEWS Country Brief Botswana

Reference Date: 08-December-2016

FOOD SECURITY SNAPSHOT

- Planting of 2017 crops is ongoing, under generally favourable rainfall conditions
- Cereal production dropped sharply in 2016 for the second consecutive year due to El Niño-induced drought conditions
- Food prices rise moderately in 2016
- Impact of drought causes a steep increase in number of food insecure, estimated at over 1 million

Enhanced chance of above-average rainfall conditions for 2017 crops

Planting of the 2017 crops is underway and expected to conclude by early next year. Early seasonal rains were observed in southern parts in mid-October, with most of the country receiving average to above-average monthly precipitation volumes in November that improved soil moisture levels and promoted the establishment of early planted crops. The recent rains have also boosted dams levels compared to the corresponding period in 2015.

With weather forecasts pointing to an increased likelihood of normal to above-normal rainfall for the next three months (December-February), the early production outlook for the 2017 cereal crop is generally positive and contrasts to the previous year's drought-affected season.

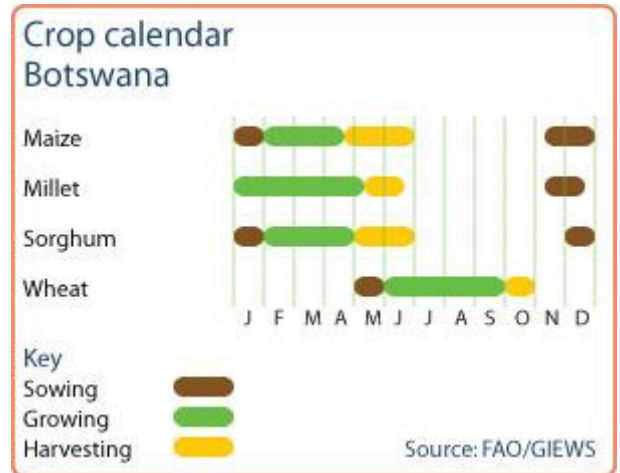
Sharp decline in 2016 crop production

As a result of the El Niño-induced drought conditions that affected the 2015/16 summer cropping season, the 2016 cereal output is estimated at a well below-average level of about 5 000 tonnes, 44 percent below the already reduced 2015 harvest.

Pastures and water availability for animals were also adversely affected by the prolonged and severe dryness, with livestock mortality averaging about 20 percent in 2015 and 2016.

Moderate increases in food prices

Annual food prices, measured by the food and non-alcoholic beverages sub-index of the national CPI, were about 3 percent up on their year-earlier levels in October 2016. The higher prices are largely reflective of a small year-on-year depreciation of the



Botswana Cereal production

	2011-2015 average	2015	2016 estimate	change 2016/2015
	000 tonnes			percent
Maize	21	4	1	-75
Sorghum	18	3	3	0
Millet	3	1	0	-100
Others	1	1	1	0
Total	43	9	5	-44

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Botswana Pula against the Rand of South Africa, the country's main trading partner, with South African imports satisfying over 90 percent of the domestic cereal requirements.

Impact of drought severely stresses food insecurity in 2016

The impact of the drought has resulted in an increased level of food insecurity. According to the Botswana Vulnerability Assessment Committee's 2016 evaluation conducted earlier in the year, just over 1 million people are estimated to be food insecure in 2016/17.



GIEWS Country Brief Botswana

Reference Date: 14-July-2016

FOOD SECURITY SNAPSHOT

- Cereal production in 2016 declined for second consecutive year on account of El Niño-induced drought conditions
- Food prices rise moderately in 2016 with appreciation of Pula against South African Rand lessening imported inflation
- Drought in 2016 causes increase in number of food insecure

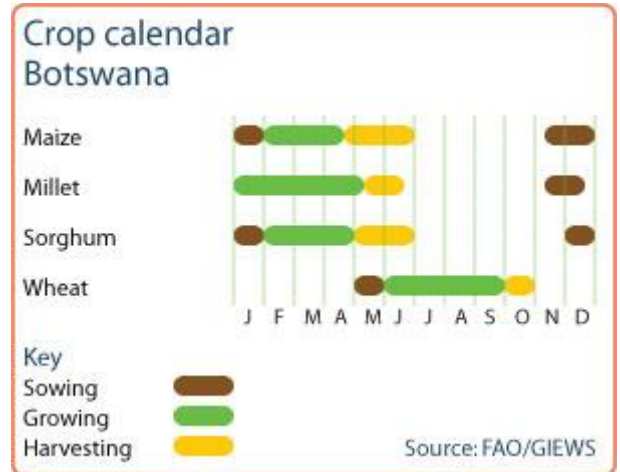
Drought conditions result in second consecutive below-average cereal output in 2016

Harvesting of the 2016 cereal crop concluded in June. El Niño-related drought conditions affected the entire 2015/16 summer cropping season (November-June), which was characterized by a late onset of seasonal rains, below-average precipitation and higher-than-normal temperatures. Although rainfall improved in February and March 2016, it could not reverse the damage caused by the prolonged dryness in the preceding months. As a result, 2016 cereal production is estimated at a well below-average level of about 5 300 tonnes, 37 percent lower than the already drought-reduced 2015 harvest.

Pastures and water availability for animals were also adversely affected by the prolonged and severe dryness, with livestock mortality averaging about 20 percent in 2015 and 2016. However, the improved rains in the first quarter of 2016 aided pasture re-growth in some areas and replenished water resources, including the Gaborone Dam, which supplies the capital and had run dry in 2015.

Food prices increase, but at moderate rate

Despite sharp food price increases in South Africa, the country's main trading partner, only moderate cereal price increases were registered in Botswana, with the Bread and Cereals sub-index of the national CPI rising by 2 percent in May 2016 on a yearly basis. The appreciation of the Botswana Pula against the South African Rand has been a contributing factor, lessening imported inflation and restricting the transmission of the record high maize prices in South Africa to the domestic market.



Botswana
Cereal production

	2011-2015 average	2015	2016 estimate	change 2016/2015
	000 tonnes			percent
Maize	21	4	1	-75
Sorghum	18	3	3	0
Millet	3	1	0	-100
Others	1	1	1	0
Total	43	9	5	-44

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Drought worsens food security in 2016

The impact of the drought has resulted in an increased level of food insecurity. According to the Botswana Vulnerability Assessment Committee's 2016 evaluation, an estimated 57 411 persons are food insecure in 2016/17, nearly double the level of the previous year. The Government is planning to assist the entire food insecure population.

Reference Date: 21-August-2015

FOOD SECURITY SNAPSHOT

- Cereal production in 2015 decreased sharply, on account of poor seasonal rains
- Food prices remained stable during the first half of 2015
- Reduced domestic cereal production results in tighter food security conditions in 2015/16

Poor seasonal rains resulted in a sharp production decrease in 2015

The 2015 aggregate cereal crop, harvested in June, is estimated at 9 000 tonnes, 70 percent down from last year's already reduced output. The sharp decrease is mostly on account of insufficient rains during the cropping season (November-June), with a severe dry period between February and March causing widespread crop failure and a significant reduction in yields. Millet production registered the largest relative fall compared to 2014's output, while the 2015 maize crop recorded the biggest absolute decline.

Grazing and drinking water availability for animals were also adversely affected by the poor rains, and livestock farmers have been encouraged to reduce their animal numbers to mitigate the impact.

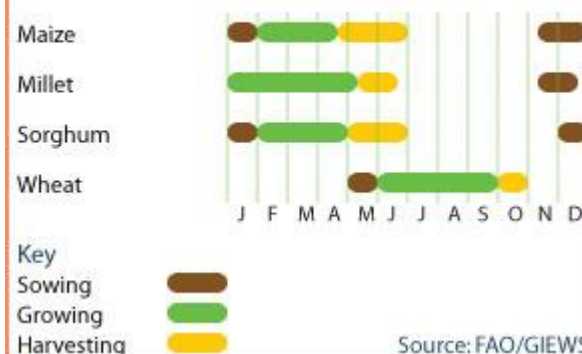
Inflation rates have remained subdued and generally stable in 2015

The overall inflation since the start of the year has remained generally flat, with the bread and cereal subcomponent of the national consumer price index registering a small year-on-year decline in June 2015. However, compared to the previous month, this subcomponent had increased moderately, partly reflecting higher grain import costs from South Africa as well as some upward pressure from the poor domestic output.

Food security worsens following the poor cereal harvest

The level of food insecurity has risen moderately in 2015/16 as a result of the reduced cereal production. Households that are reliant on seasonal farm labour are particularly vulnerable, with reduced farm employment opportunities in 2015 expected to constrain income levels and consequently their capacity to access food. The results from the Botswana Vulnerability Assessment Committee's 2015 evaluation indicate a small 3 percent increase in the number of people requiring assistance to 30 318.

Crop calendar Botswana



Botswana Cereal production

	2010-2014 average	2014	2015 estimate	change 2015/2014
	000 tonnes		percent	
Sorghum	25	8	3	-62
Maize	23	15	4	-73
Millet	4	6	1	-83
Others	1	1	1	0
Total	53	30	9	-70

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Reference Date: 16-December-2014

FOOD SECURITY SNAPSHOT

- Good rains in November benefit crop establishment of 2015 cereal crops
- Bumper cereal output harvested in 2014
- Food security conditions improve in 2014/15, reflecting large cereal production and stable food prices

Favourable rains forecast for 2014/15 cropping season

Planting of the 2015 cereal crops, to be harvested from May, is underway and is expected to be finalized in January. Following sporadic and below-normal rains in October, which normally marks the start of the rainy season (October-March), precipitation levels increased in November and the start of December, benefiting early crop establishment. Rainfall forecasts point to overall favourable conditions between December and March, indicating a generally positive outlook for the cereal 2015 output. Continued support from the Government through the Integrated Support Programme for Arable Agriculture Development (ISPAAD) is expected to improve input access for farmers, covering both cereal and horticulture crops, and help increase the land under irrigation.

Bumper crop estimated in 2014

Despite poor rains at the start of the 2013/14 season, weather conditions improved significantly from December onwards, contributing to a bumper cereal output, estimated at 74 000 tonnes, approximately 64 percent higher than 2013's below-average output. A substantial relative increase was estimated for maize, while good outputs for sorghum and millet were registered.

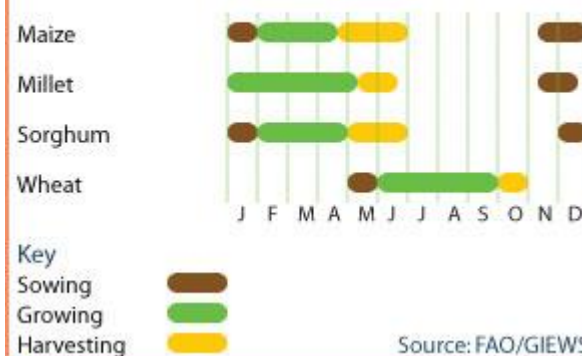
Food prices remain stable in 2014

The food price component of the consumer price index has remained stable in 2014 and was only marginally higher than its year earlier level in November.

Improved food security situation

The large 2014 cereal harvest helped improve food security conditions, with an estimated 1 500 people assessed to be food insecure, according to the results of the national 2014/15 vulnerability assessment committee report. This is a significant reduction compared to the 372 000 persons estimated to be at risk of food insecurity in 2013/14, following the drought reduced 2013 harvest.

Crop calendar Botswana



Botswana Cereal production

	2009-2013 average	2013	2014 estimate	change 2014/2013
	000 tonnes		percent	
Sorghum	29	23	30	30
Maize	19	15	35	133
Millet	4	6	8	33
Others	1	1	1	0
Total	53	45	74	64

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Reference Date: 11-February-2014

FOOD SECURITY SNAPSHOT

- Dry conditions during the start of the 2013/14 cropping season, but rains improved in January 2014
- Aggregate cereal production in 2013 estimated at a below average level
- Food insecurity conditions increase in the subsistence sector due to dry conditions in 2013

Unfavourable cropping conditions at the start of the 2013/14 season

Harvesting of the 2014 cereal crops is expected to start in April. Rains during the start of the 2013/14 cropping season (October-June) were erratic, including a late start and overall below average cumulative levels in southern regions. However, rains improved in 2014, positively impacting pasture and crop conditions. An average to below-average harvest is expected in 2014, as a result of the drier conditions in late 2013.

The government increased the support package to farmers for the 2013/14 cropping season (October-June) through the Integrated Support Programme for Arable Agriculture Development (ISPAAD). Farmers are set to receive a subsidy of BWP 800 (approximately USD 92) per hectare for agricultural inputs, twice the previous level, with a maximum of 16 hectares for subsistence farmers, while emerging and commercial farmers would be supported for up to 150 and 500 hectares respectively, but with a lower subsidy rate. In addition, the horticulture sector has been included in the ISPAAD programme, specifically supporting irrigation facilities, with the government contributing up to 60 percent of the installation costs.

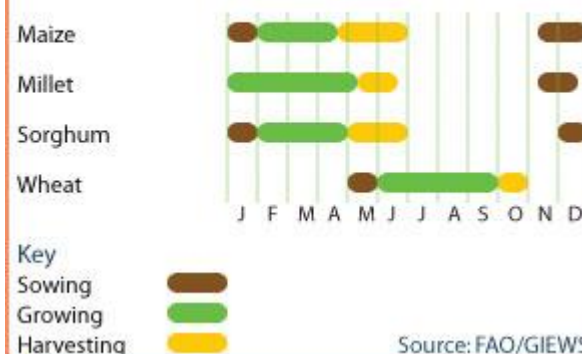
Food prices stable, but at higher levels than in 2012

Annual inflation rates declined during most of 2013 and in December 2013 were estimated at 4 percent, about three percentage points below the corresponding period in 2012. Correspondingly, the food component of the CPI has remained comparatively stable in 2013, but recorded a year-on-year increase of 4 percent in December. However, the sharply increasing price of maize in South Africa, the country's main supplier of grain, is expected to exert imported inflationary pressure on domestic cereal prices.

Drought conditions in 2013 aggravate food insecurity

Although domestic production covers only 10 percent of Botswana's total consumption requirements, poor production in the subsistence sector and deterioration in livestock conditions have aggravated food insecurity. About 372 000 persons were estimated to be at risk of food insecurity in 2013/14. In response, the government has allocated USD 25.6 million to relief measures, including nutritional support and increasing the number of boreholes. In addition, the reduced dam levels have prompted an extension of water rationing in some locations.

Crop calendar Botswana



Botswana Cereal production

	2008-2012 average	2012	2013 estimate	change 2013/2012
	000 tonnes		percent	
Sorghum	29	25	23	-8
Maize	20	20	15	-25
Millet	3	4	6	50
Others	1	1	1	0
Total	54	50	45	-10

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Reference Date: 21-November-2013

FOOD SECURITY SNAPSHOT

- Dry conditions prevailed at the start of the 2013/14 cropping season, but forecasts indicate improved rainfall in the following months
- Aggregate cereal production in 2013 estimated at a below average level, following poor rains in 2012/13
- Food insecurity conditions aggravated in the subsistence sector

Planting of the 2014 cereal crops began under generally dry weather conditions

Land preparation and the bulk of the planting for the 2014 cereal crops, principally sorghum and maize, began in November, and is expected to be finalised before the end of the year. Dry conditions were observed in October and the first half of November, which is likely to delay planting activities. However, rainfall forecasts point to an increased likelihood of average to above average precipitation between January and March 2014, during the main growing period, while eastern areas are expected to receive average to above average rains in December.

The government increased the support package to farmers for the 2013/14 cropping season (October-June) through the Integrated Support Programme for Arable Agriculture Development (ISPAAD). Farmers are set to receive a subsidy of BWP 800 (approximately USD 92) per hectare for agricultural inputs, twice the previous level, with a maximum of 16 hectares for subsistence farmers, while emerging and commercial farmers would be supported for up to 150 and 500 hectares respectively, but with a lower subsidy rate. The expansion of the support programme depends on farmers ploughing and row planting, in order to contribute to efforts to improve cropping methods.

Poor rains result in below average 2013 cereal crop

Aggregate cereal production for the 2012/13 cropping season is estimated at about 45 000 tonnes, 17 percent below the previous five-year average. The cropping season was largely characterized by below average rains (the government declared 2013 as a drought year in July) causing significant water deficits and adversely impacting crop growth in the main agricultural areas of the east and south.

Food prices stable, but at higher levels than in 2012

The decline in national annual inflation rate, which began in the first quarter of 2013, continued through October 2013 and at 4.8 percent is below its levels of the same month in 2012. The food component of the CPI has remained comparatively stable in 2013, but recorded a year-on-year increase of 4 percent in October.

Increased rate of monthly maize imports observed in 2013/14

The monthly import rate of maize from South Africa in the 2013/14 marketing year (April/March) has so far averaged at nearly 16 000



Botswana Cereal production

	2008-2012 average	2012	2013 estimate	change 2013/2012
	000 tonnes		percent	
Sorghum	29	25	23	-8
Maize	20	20	15	-25
Millet	3	4	6	50
Others	1	1	1	0
Total	54	50	45	-10

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

tonnes, about 1 000 tonnes more than the previous year. While the total cereal import requirement is similar to last year, the lower prices recorded in South Africa have encouraged the higher import rate during the first half of the current marketing year.

Drought conditions aggravate food security in 2013/14

Although domestic production covers only 10 percent of Botswana's total consumption requirements, poor production in the subsistence sector and deterioration in livestock conditions have aggravated the food security situation. About 372 000 persons were estimated to be at risk of food insecurity in 2013/14. In response, the government has allocated USD 25.6 million to relief measures, including nutritional support and increasing the number of boreholes. In addition, the reduced dam levels have prompted an extension of water rationing in some locations.

Reference Date: 25-April-2013

FOOD SECURITY SNAPSHOT

- Rainfall deficits expected to result in below average cereal production in 2013
- Increased cereal imports registered in the 2012/13 marketing year (April/March)
- Poor domestic production in 2013 expected to aggravate food insecurity in subsistence sector

Reduced cereal production expected in 2013

Harvesting of the 2013 cereal crop is currently underway. The 2012/13 cropping season (October/June) was largely characterized by prolonged period of below average rains, punctured by intense rainfall in January that caused localised flooding and minor damage to the agriculture sector. Despite some relief from the abundant rains at the start of 2013, significant seasonal water deficits developed as the season progressed, adversely impacting crop growth in the main agricultural areas in eastern and southern parts. In addition to the unfavourable weather conditions, an outbreak of armyworms in late 2012, mainly concentrated in south-eastern areas of the country, infested approximately 4 500 hectares of cropped land; representing about 3 percent of average cropped area to cereals.

Given the overall poor cropping conditions, current indications point to a cereal output similar to last year's drought affected harvest, which was below the short-term average. A Government crop and food security assessment mission is currently underway to ascertain the impact of the rainfall deficits on crop production and livelihoods.

For the subsequent 2013/14 cropping season the Government plans to increase the support package to farmers through the Integrated Support Programme for Arable Agriculture Development (ISPAAD). Farmers are set to receive BWP 800 (USD 97) per hectare, twice the previous level, with a maximum of 16 hectares for subsistence farmers, while emerging and commercial farmers would be supported for up to 150 and 500 hectares respectively. The expansion of the support programme depends on farmers ploughing and row planting, in order to contribute to efforts of improved cropping methods.

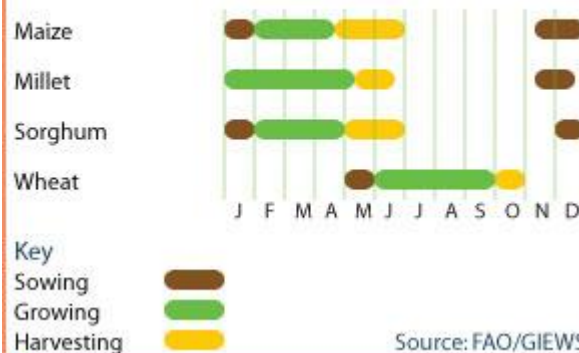
Food prices rise steadily

The national annual inflation rate remained comparatively stable between the last quarter of 2012 and first quarter of 2013, averaging at about 7.4 percent over the six months. Similarly, the food component of the CPI exhibited steady year-on-year increases over the same period.

Cereal imports rise following lower 2012 cereal production

Following the reduced 2012 domestic harvest, maize imports for the 2012/13 marketing year (April/March) reached nearly 200 000 tonnes, about 16 percent above the 172 000 tonnes imported in the previous marketing year. In 2013/14, cereal import requirements are estimated at a similar level of last year, given the expectation of a successive poor cereal harvest.

Crop calendar Botswana

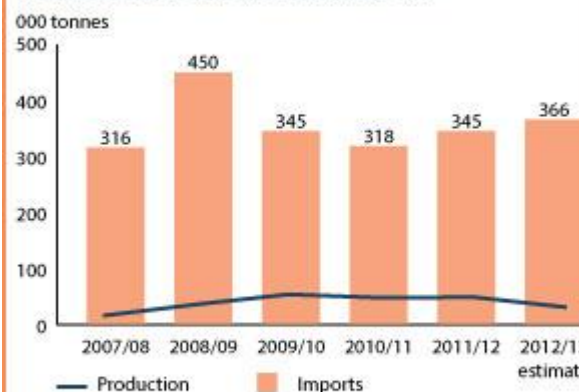


Botswana Cereal production

	2007-2011 average	2011	2012 estimate	change 2012/2011
	000 tonnes		percent	
Sorghum	24	21	18	-14
Maize	13	24	10	-58
Millet	2	3	2	-33
Others	1	1	1	0
Total	41	49	31	-37

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Botswana Total cereal production and imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Increased food insecurity expected in 2013/14 following the expected successive poor cereal production

Although domestic production covers less than 20 percent of Botswana's consumption requirements, the poor production outlook in the subsistence sector is expected to lead to a deterioration of food insecurity conditions later in 2013. In addition, the recent increase in cereal and bread prices, by approximately 7 percent in March compared to last year, is expected to negatively impact on vulnerable households. The release of the crop and food security assessment report in the next months is expected to provide more detailed information on the current situation and needed interventions.

Reference Date: 27-August-2012

FOOD SECURITY SNAPSHOT

- Cereal output decreases in 2012 following poor rains
- Cereal imports forecast to rise in 2012/13 marketing year (April/March)
- Inflation rate slows in 2012

Prolonged dry spell reduces cereal output in 2012

Harvesting of the 2011/12 season's cereal crops was completed in June, under generally dry conditions, which persisted throughout much of the season. In particular, between February and June precipitation levels were consistently below average, albeit a brief period of heavy rains in March. The poor rains coincided with the critical yield formation stage of the maize crop and as a result maize production is estimated at about 10 000 tonnes, 14 000 tonnes below last year's good output. In addition to the dry conditions, an outbreak of quelea birds in some parts of the country, including areas in the Southern and Central districts in April 2012 resulted in some damage to cropped land. However, the implementation of control measures limited the impact. Overall, the 2012 cereal harvest is put at approximately 31 000 tonnes, including approximately 18 000 tonnes of sorghum.

The low cumulative rains also caused deterioration in pasture conditions, increasing pressure on existing resources in overpopulated areas, particularly in North West and Bobirwa.

Inflation rate slows during first half of 2012

The national annual inflation rate continued its downward trend since the start of 2012. In June 2012, the rate was 7.3 percent, slightly lower than last year's rate for the same month. Similarly the year-on-year inflation rate of the food sub-index of the national CPI declined between January and May 2012 by 1 percent. However, a marginal increase was recorded in June.

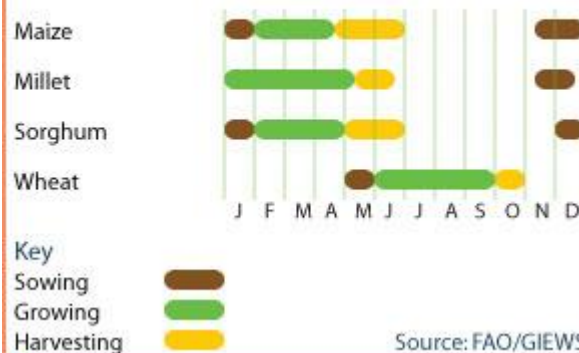
Imports are expected to rise slightly in 2012/13 marketing year

Given the reduced 2012 cereal output, import requirements are forecast to rise in the 2012/13 marketing year (April/March). Favourable stocks, built-up from previous good harvests, will also help to bridge the larger cereal deficit this year. However, levels of imports between April and July 2012 from South Africa were at a similar level to 2011. The higher maize prices currently recorded in South Africa are expected to contribute to increased import costs for the country.

Drought affected areas are a concern

Although Botswana meets the bulk of its consumption requirements through commercial imports, poor production in the traditional agriculture areas is expected to negatively impact on the food security condition of smallholders and the rural poor. In response, the government has declared the 2012/13 marketing year a partial drought year and subsequently initiated a number of programmes to help alleviate the current situation, including increasing the number of school

Crop calendar Botswana

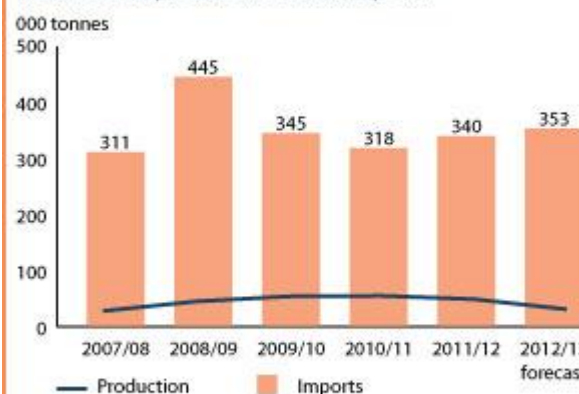


Botswana Cereal production

	2007-2011 average	2011	2012 forecast	change 2012/2011
	000 tonnes		percent	
Sorghum	30	21	18	-14
Maize	13	24	10	-58
Millet	2	3	2	-33
Others	1	1	1	0
Total	46	49	31	-37

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Botswana Total cereal production and imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

meals in the affected districts. In addition, to mitigate the potential impact of a consecutive dry spell during the 2012/13 cropping season, expected to begin in October, the government will continue to distribute fertilisers and seeds, in particular promoting crops suited to the country's agro-ecological zones.

Reference Date: 26-March-2012

FOOD SECURITY SNAPSHOT

- Below average rainfall, particularly in southern areas, raises concern on performance of 2011/12 cereal crops
- Inflation rate slows in 2012; cereals prices remain higher than the previous year

Dry spell in 2012 causes deterioration in vegetation conditions

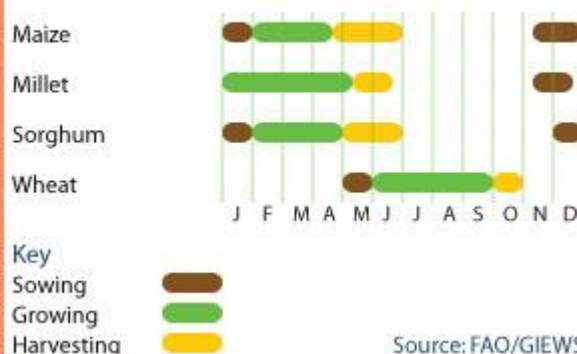
Harvesting of the main cereal crops (mainly maize, millet and sorghum) in the 2011/12 cropping season (November-May), is expected to start in April. Northern areas of the country received below-average rains in early November and coupled with high temperatures had negatively affected planting and early development of crops. Rains, however, resumed more normal patterns between December and February over northern areas of the country. By contrast, southern and eastern areas, which represent a large cereal growing region, have continued to experience below average rains since late January. This has had a negative impact on vegetation conditions, indicating a poor outturn to the 2011/12 cereal output. Although Botswana meets the bulk of its consumption requirements through commercial imports, the anticipated poor production in the traditional agriculture areas could negatively impact on the food security condition of small holders and the rural poor. The below normal rains are also expected to have led to the deterioration in pasture and rangeland conditions.

Cereal prices higher at the start of 2012

According to the Central Statistics Office, the year-on-year inflation was recorded at 8.2 percent in February 2012, slightly below the high rates recorded in the last quarter of 2011. The bread and cereal sub-index of the national CPI was about 9 percent higher in February compared to one year earlier, reflecting rising prices of cereals in South Africa, Botswana's main trading partner.

Despite the high prices, Botswana has imported approximately 167 000 tonnes of maize from South Africa, during the 2011/12 marketing year (April/March). It is expected to satisfy its annual import requirement, estimated at 170 000 tonnes, during the remaining two weeks of the marketing year.

Crop calendar Botswana

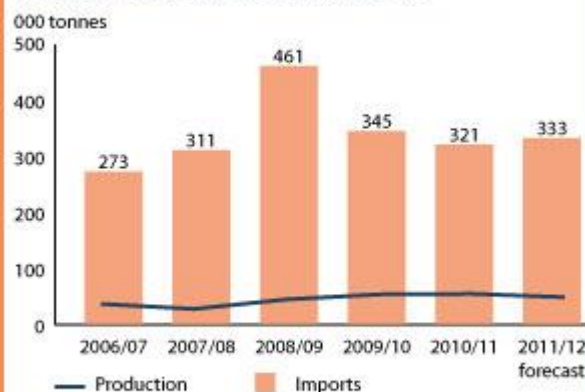


Botswana Cereal production

	2006-2010 average	2010	2011 estimate	change 2011/2010
	000 tonnes		percent	
Sorghum	30	33	21	-36
Maize	11	18	24	33
Millet	2	3	3	0
Others	1	1	1	0
Total	44	55	49	-11

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Botswana Total cereal production and imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Reference Date: 16-January-2012

FOOD SECURITY SNAPSHOT

- Mixed performance of rains during the beginning of the 2011/12 cropping season
- Rise in inflation during 2011 mainly due to higher food prices

Rainfall performance was varied at the start of the 2011/12 cropping season

Planting of the 2011/12 cereal crops, mainly maize, millet and sorghum, is almost complete. Northern areas of the country received below-average rains in early November and together with high temperatures negatively affected planting and early development of crops. Rains however, resumed more normal patterns in late November and December over northern areas of the country. By contrast, south-western parts of the country continue to experience below average rains.

The provision of seeds and other inputs through the government's Integrates Support Programme for Arable Agriculture Development (ISPAAD) has continued for the current season. As of September 2011, an estimated 154 tonnes of seeds, including maize, millet and cowpeas, had been distributed to farmers across the country. However, the rate of distribution is below that of the previous year and only represents 6 percent of the total seed requirements. This could impact cropping activities and therefore potential production, particularly at the subsistence level.

Despite generally favourable livestock conditions, reports in September 2011 indicated cases of foot and mouth disease (FMD). In response, the government implemented several measures, including movement restrictions and a vaccination programme. No new cases have been recorded as of December 2011.

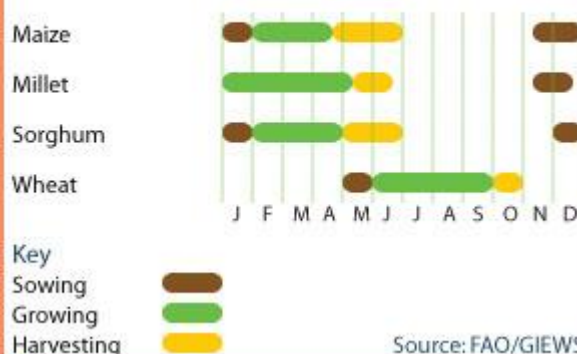
Cereal production declined in 2011

The 2011 aggregate cereal output, harvested from April 2011, is estimated at 49 000 tonnes, marking a decrease of 11 percent relative to the previous year's bumper harvest. While maize production registered an increase, sorghum output declined to 21 000 tonnes, down from 33 000 recorded in 2010.

Rise in cereal prices during 2011

According to the Central Statistics Office the year-on-year inflation was recorded at 9 percent in December 2011. A rise in food inflation (including non-alcoholic beverages) contributed to overall higher prices, with bread and cereals sub-index of the national consumer price index rising by about 7 percent during 2011.

Crop calendar Botswana

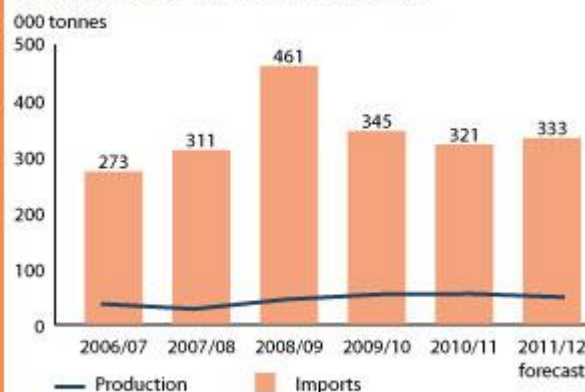


Botswana Cereal production

	2006-2010 average	2010	2011 estimate	change 2011/2010
	000 tonnes		percent	
Sorghum	30	33	21	-36
Maize	11	18	24	33
Millet	2	3	3	0
Others	1	1	1	0
Total	44	55	49	-11

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Botswana Total cereal production and imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Reference Date: 27-May-2011

FOOD SECURITY SNAPSHOT

- Mixed rains received during the 2010/11 cropping season
- Pasture and livestock conditions mostly good, but foot and mouth disease detected
- The consumer price index of food is higher than a year ago, despite a decline in cereal prices

Irregular rains during 2010/11 cropping season

Harvesting of the 2010/11 cereal crops, which began in May, is scheduled to finish by the end June. Following early seasonal deficits in southern and western regions, rainfall improved throughout the country towards the end of 2010. However, heavy rains at the end of December and January delayed planting activities in some areas, compelling farmers to extend the planting period. As a result, farmers were encouraged to sow early maturing varieties to mitigate the effects of the shorter growing period. During February and early March, particularly in southern areas of the country where rainfall deficits were more severe, yield levels, especially for the late planted crops, are expected to decline compared to the previous season. However, preliminary reports indicate a larger cropped area for the 2010/11 season, which may, in part, compensate for lower crop productivity.

The provision of seeds and other inputs, including fertiliser, through the government's Integrated Support Programme for Arable Agriculture Development (ISPAAD) continued for the 2010/11 cropping season. It has been estimated that the seeds requested from ISPAAD will be sufficient to cover an area of 347 680 hectares.

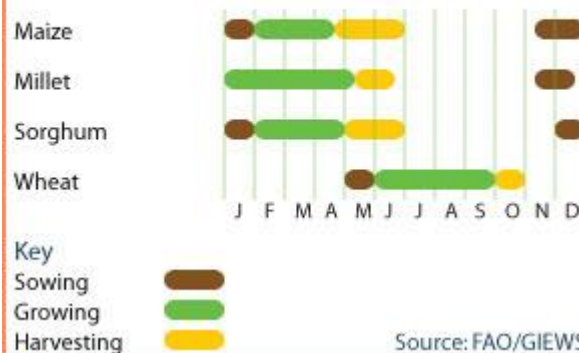
Foot and mouth disease detected, but under control

Reports indicate generally good livestock conditions across the country; however, in February 2011 a case of foot and mouth disease (FMD) was detected. In efforts to control and combat FMD, a number of measures were implemented by the government including movement control of cloven hoofed animals within and between veterinary disease control zones. The disease is currently contained and preventative measures are still in place.

Food inflation increases

Domestic prices of food products (measured by the consumer price index) were 6.5 percent higher in April 2011 compared to levels in the same month last year. The increase is mainly attributed to rising prices of dairy products (milk, cheese and milk products), which increased by about 19 percent over the same period. However, the cereal and bread sub-index is slightly lower, despite modest increases since December 2010.

Crop calendar Botswana

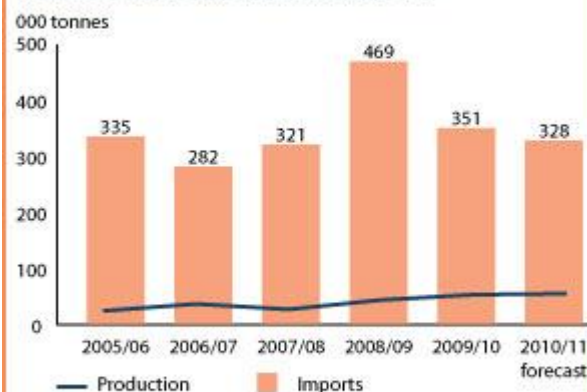


Botswana Cereal production

	2005-2009 average	2009	2010 estimate	change 2010/2009
	000 tonnes			percent
Sorghum	28	38	33	-13
Maize	8	13	18	38
Millet	1	2	3	50
Others	1	1	1	0
Total	37	54	55	2

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Botswana Total cereal production and imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Reference Date: 21-January-2011

FOOD SECURITY SNAPSHOT

- Mixed rains received during the first half of the 2010/11 agricultural season
- Large increase in the 2010 maize and millet crop, but sorghum production was lower
- Pasture and livestock conditions mostly good
- Index of prices of bread and cereals lower than a year ago, but, overall, food prices are higher

Below average rains recorded in south-west areas at the start of the agricultural season

The 2010/11 rainy season started at the end of October in north-eastern regions, with average precipitation observed in November 2010. However, during December and the start of January rainfall levels declined. Early seasonal deficits were recorded in southern and western regions, but rains improved in November and December across these areas. Planting of the main cereal crops is still on-going and is expected to be completed at the end of January. The provision of seeds and other inputs, including fertiliser, through the government's Integrated Support Programme for Arable Agriculture Development (ISPAAD) has continued for the current season. An estimated 341 108 bags of seeds (maize, sorghum, millet and cowpea) have been requested by farmers, including about 1750 tonnes of maize. It has been estimated that the seeds requested from ISPAAD will be sufficient to cover an area of 347 680 hectares.

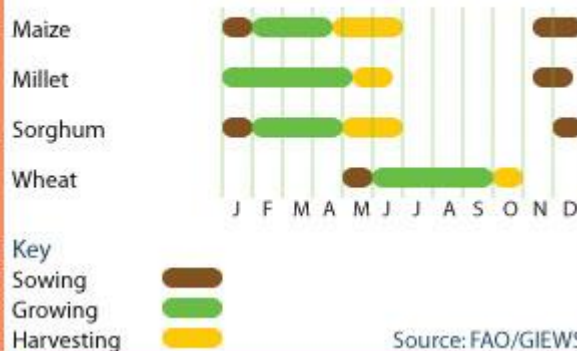
Reports indicate generally good livestock conditions at the end of 2010, but fires have degraded grazing pastures in some areas.

Larger plantings contribute to above average harvest in 2010

Favourable rains at the start of the 2009/10 season and good availability of inputs supported a large increase in plantings of sorghum and maize crops. The government's assistance through ISPAAD, in form of seed and agricultural inputs supplies, also supported production gains. A total of 187 428 bags of seeds were distributed to 90 570 farmers and 59 315 bags (50 kg) of fertilizers to 4 867 beneficiaries. However, despite the enlarged acreage, the area harvested in 2010 only represented about 62 percent of the planted area. This proportion is lower than the 2007/08 season, prior to the implementation of ISPAAD, but represents an improvement over the 2008/09 season. Almost all the area which was not harvested is in the communal farming sector.

Overall, the country registered a smaller sorghum harvest in 2010, which was still above the average of the previous five years, but the substantial increase in both maize and millet production helped to offset the low sorghum output. Latest production estimates indicate an aggregate cereal harvest of about 55 000 tonnes, just above the output of 2009, but well above the five-year average.

Crop calendar Botswana

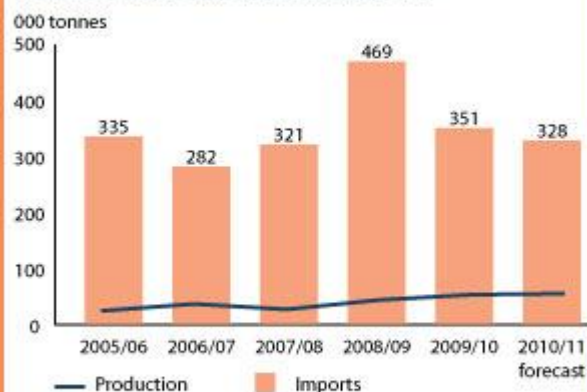


Botswana Cereal production

	2005-2009 average	2009	2010 estimate	change 2010/2009
	000 tonnes			percent
Sorghum	28	38	33	-13
Maize	8	13	18	38
Millet	1	2	3	50
Others	1	1	1	0
Total	37	54	55	2

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Botswana Total cereal production and imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Food inflation increases, but cereal prices decline

Domestic prices of food products (measured by the consumer price index) were approximately 4 percent higher in December 2010 compared to levels one year earlier; however, over the same period, cereal and bread prices declined by 3 percent. The rising costs of other food items, including meats and vegetables, contributed to the general increase in food prices. Basic food staples, including sorghum and maize meal, continue to remain exempt from VAT and this has helped to maintain low cereal prices.

Reference Date: 07-April-2010

FOOD SECURITY SNAPSHOT

- Above average 2010 cereal production now anticipated.
- Pasture and livestock conditions mostly good but outbreaks of foot and mouth disease still limit the country's beef exports.
- Index of prices of bread and cereals lower than a year ago.

Above average production expected due to larger plantings in spite of irregular rains

Early rains in mid-November and availability of inputs have favoured a large increase in plantings of the 2010 sorghum and maize crops about to be harvested. The Government has also this year assisted farmers with seed and other inputs as part of the Integrated Support Programme for Arable Agriculture Development (ISPAAD) programme. A total of 247 245 bags of seeds were distributed to 90 570 farmers and 59 315 bags (50 kg) of fertilizers to 4 867 beneficiaries. After the favourable start of the season a prolonged dry spell was experienced in several areas in December and early planted crops were severely affected. Rainfall was about normal in January but irregular in several parts in February. Latest estimates prepared by the Ministry of Agriculture indicate a cereal production of over 76 000 tonnes some 36 percent above the previous year's revised estimate. The increase reflects a sharp increase in sorghum plantings in communal areas which have more than offset a reduction in yields per hectare.

Pasture and livestock conditions mostly good

Pasture and livestock conditions in February were good to very good in most districts, Animal production is an important agriculture activity throughout the country, particularly in the central and southern areas, but repeated outbreaks of foot and mouth disease have jeopardized the country's beef exports.

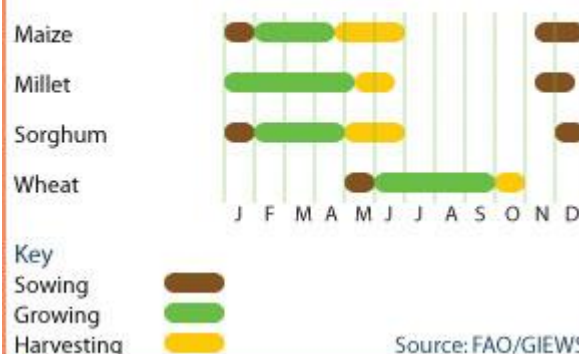
Total cereal imports estimated to have declined in 2009/10

The cereal imports for the 2009/10 marketing year (April/March) are estimated about normal on account of the larger 2009 harvest. Imports in 2008/09 were exceptionally high because of the cross-border re-exports to Zimbabwe. However, even in a good production year, some 80 percent of the country's total cereal consumption requirement is met through imports.

Lower food prices

Domestic prices of food products (measured by the consumer price index) have declined steadily in recent months mainly reflecting the lower cost of imported supplies from South Africa. The sub-index of prices of Bread and Cereals was in February 2010 about 3 percent below year earlier levels.

Crop calendar Botswana

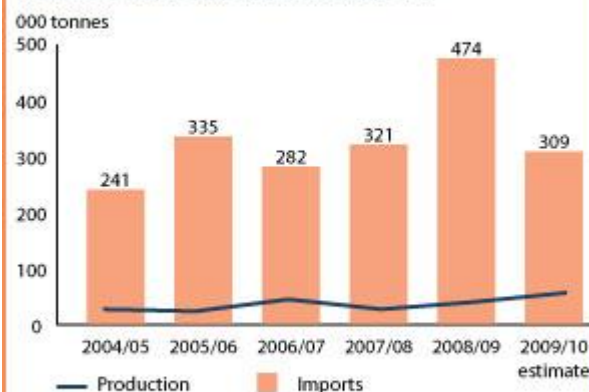


Botswana Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Sorghum	29	37	57	54
Maize	9	17	18	6
Wheat	1	1	1	0
Others	0	2	2	0
Total	39	57	77	35

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Botswana Total cereal production and imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Reference Date: 20-March-2010

FOOD SECURITY SNAPSHOT

- Lower 2010 cereal production expected, but crop still above average.
- Pasture and livestock conditions mostly good but outbreaks of foot and mouth disease still limit the country's beef exports.
- Index of prices of bread and cereals lower than a year ago.

Decrease in cereal production expected, but still above average

Rains were received earlier than normal in mid-November favouring land preparation and planting of the 2010 sorghum and maize crops. Government has also assisted farmers with seed and other inputs as part of the Integrated Support Programme for Arable Agriculture Development (ISPAAD) programme. This year, a total of 247 245 bags of seeds were distributed to 90 570 farmers and 59 315 bags (50 kg) of fertilizers to 4 867 beneficiaries. After the favourable start of the season a prolonged dry spell was experienced in December in several areas and early planted crops were severely affected. Rainfall was about normal in January and February but was probably too late for early planted crops. Early estimates prepared by the Ministry of Agriculture in late February indicate a reduction in cereal production from the good of last year to some 65 000 tonnes, still an above average crop.

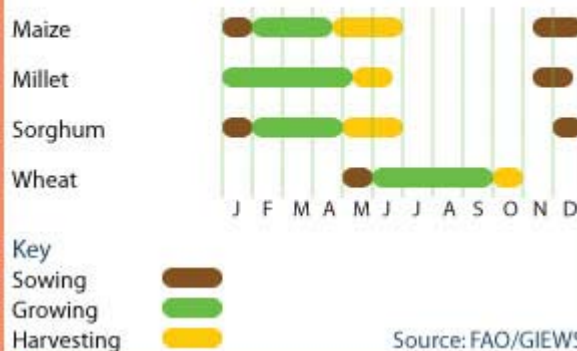
Pasture and livestock conditions mostly good

Pasture and livestock conditions in February were good in most districts, with the exception of Bobirwa and Kgalegadi North where conditions were only fair. Animal production is an important agriculture activity throughout the country, particularly in the central and southern areas, but repeated outbreaks of foot and mouth disease have jeopardized the country's beef exports.

Total cereal imports estimated to have declined in 2009/10

The cereal imports for the 2009/10 marketing year (April/March) are estimated to be below normal on account of the larger 2009 harvest. Imports in 2008/09 were exceptionally high because of the cross-border re-exports to Zimbabwe. However, even in a good production year, some 80 percent of the country's total cereal consumption requirement is met through imports. Domestic prices of food products (measured by the consumer price index) have declined steadily in recent months mainly reflecting the lower cost of imported supplies from South Africa. The sub-index of prices of Bread and Cereals was in February 2010 about 3 percent below year earlier levels.

Crop calendar Botswana

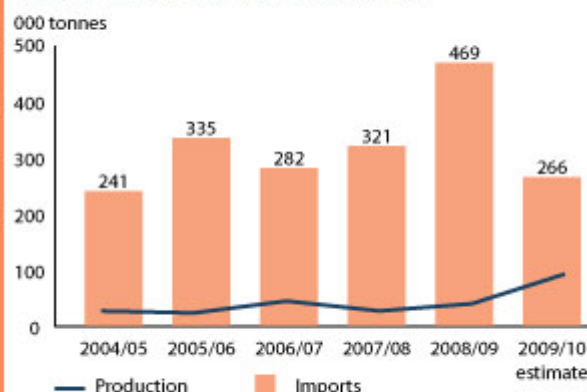


Botswana Cereal production

	2004-2008 average	2008	2009 estimate	change 2009/2008
	000 tonnes			percent
Sorghum	25	32	70	119
Maize	7	7	22	214
Wheat	1	1	1	0
Others	0	0	0	0
Total	33	40	93	132

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Botswana Total cereal production and imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Reference Date: 20-January-2010

FOOD SECURITY SNAPSHOT

- Prospects for 2010 crops uncertain so far
- Cereal production increased in 2009
- Repeated outbreaks of foot and mouth disease have jeopardized the country's beef exports
- Prices of bread and cereals marginally lower in 2009
- Total cereal imports needs lower in 2009/10 marketing year (April/March)

Early rains favour planting of new season crops,

Rains were received earlier than normal in mid-November favouring land preparation and planting of the 2010 sorghum and maize crops. Government has also this year assisted farmers with seed and other inputs as part of the Integrated Support Programme for Arable Agriculture Development (ISPAAD) programme. Weather condition in early December were favourable for crop growth, but a two week dry spell in late December in northern producing areas may have affected crop development. Normal weather resumed in late December–early January. It is still early in the season and final crop outcome will depend on weather developments in the next 2 to 3 months.

Increased cereal harvest in 2009

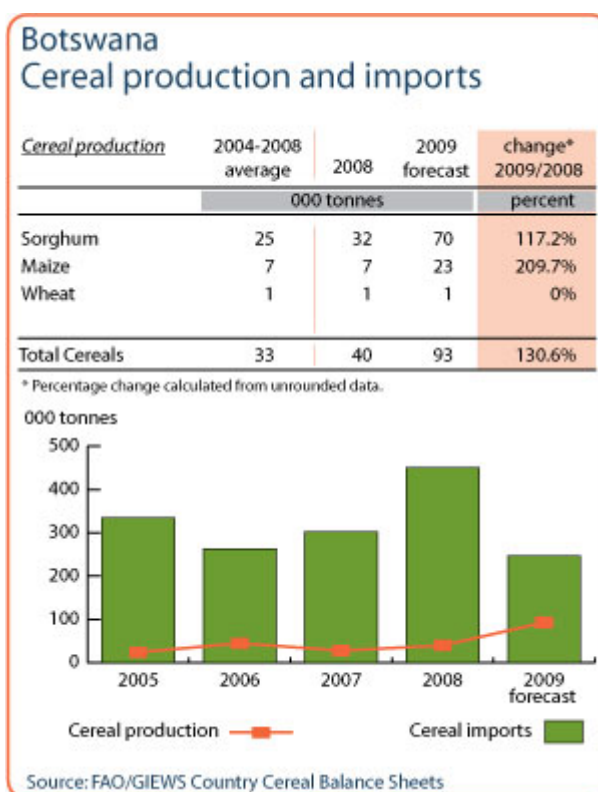
The main season's crops for 2009, primarily sorghum and maize, were harvested from April. Production estimates from the Ministry of Agriculture indicate an improved cereal harvest of 93 000 tonnes. Despite a late start and earlier cessation of the rains, precipitation was abundant during most of the growing season. In addition, the distribution of approximately 5 700 tonnes of fertilisers through the Government's SPAAD programme further supported the larger production in 2009.

Pasture and livestock conditions remain satisfactory

Pasture and livestock conditions in 2009 have been generally good during the dry season although not as good as in 2008 due to early cessation of the rainfall. Animal production is an important agriculture activity throughout the country, particularly in the central and southern areas, but repeated outbreaks of foot and mouth disease have jeopardized the country's beef exports.

Total cereal imports estimated to decline

The cereal import requirement for the 2009/10 marketing year (April/March) is estimated to be below normal on account of the larger 2009 harvest. Imports in 2008/09 were exceptionally high because of the cross-border re-exports to Zimbabwe. However, even in a good production year, some 80 percent of the country's total cereal consumption requirement is met through imports. Domestic prices of cereals and products (measured by the consumer price index) have decline marginally in recent months mainly reflecting the lower cost of imported supplies from South Africa and were in November about the same as a year earlier.



Reference Date: 10-September-2009

FOOD SECURITY SNAPSHOT

- Cereal production increased in 2009
- Repeated outbreaks of foot and mouth disease have jeopardized the country's beef exports
- Prices of bread and cereals stable in first half of 2009
- Total cereal imports should be lower in 2009/10 marketing year (April/March)

Increased cereal harvest in 2009

The main season's crops for 2009, primarily sorghum and maize, were harvested from April. Production estimates from the Ministry of Agriculture indicate an improved cereal harvest of 93 000 tonnes. Despite a late start and earlier cessation of the rains, precipitation was abundant during most of the growing season. In addition, the distribution of approximately 5700 tonnes of fertilisers through the Government's Integrated Support Programme for Arable Agriculture Development (ISPAAD) further supported the improvement in production levels. Planting of the 2009/10 cereal crops is scheduled to begin in November.

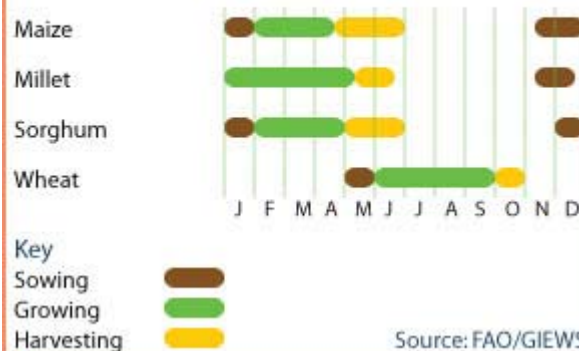
Pasture and livestock conditions remain satisfactory

Pasture and livestock conditions this year were reported to be generally good during the season but poorer than last year due to early cessation of the rainfall. Animal production is an important agriculture activity throughout the country, particularly in the central and southern areas, but repeated outbreaks of foot and mouth disease have jeopardized the country's beef exports.

Total cereal imports are expected to decline

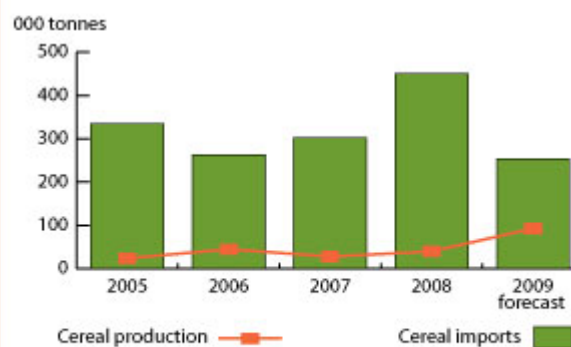
The import requirements for the 2009/10 marketing year (April/March) are expected to decrease on account of the improved 2009 harvest. Last year's imports were relatively high because of the cross-border re-exports to Zimbabwe. However, even in a good production year, approximately 77 percent of the country's total cereal consumption requirements are met through imports. The national bread and cereal price index increased marginally between January and July 2009, but remains 16.7 percent higher compared to a year earlier.

Crop calendar Botswana



Cereal production and imports Botswana

Cereal production	2004-2008 average	2008	2009 forecast	change 2009/2008
	000 tonnes		percent	
Sorghum	25	32	70	118.8%
Maize	7	7	23	228.6%
Wheat	1	1	1	0%
Total Cereals	33	40	93	132.5%



Source: FAO/GIEWS Country Cereal Balance Sheets