



The ReNAPRI Partial-equilibrium initiative Training workshop – Malawi

Prof. Ferdi Meyer

ReNAPRI – BFAP, South Africa



- Regional Network of Agricultural Policy Research Institutes (ReNAPRI)
 - Offers a unique solutions:
 - African-led, African-driven initiative with a ground-up approach to policy research
 - Membership includes existing policy research institutes with a proven track-record of policy advisement within their respective countries.



Taking a regional perspective on analysing the impact of agricultural and trade policies and drivers



Support policy analysis and decision-making by public and private sector

- Institute for Social and Economic Research, University of Kinshasa; **Democratic Republic of Congo**;
- Tegemeo Institute of Agricultural Policy and Development, Egerton University – **Kenya**
- Centre for Agricultural Research and Development, Bunda College, **Malawi**;
- CEPPAG, University of Eduardo Mondlane, **Mozambique**
- Bureau for Food and Agricultural Policy (BFAP)-University of Pretoria & Stellenbosch, **South Africa**;
- Department of Agriculture Economics and Agribusiness- Sokoine University of Agriculture, **United Republic of Tanzania**;
- Indaba Agriculture Policy Research Institute (IAPRI), **Zambia**
- Department of Agriculture Economics Makarere University, **Uganda**
- Department of Agriculture Economics and Extension, University of Zimbabwe, **Zimbabwe**



The PE modelling initiative

- Ongoing since 2012
- Various sources of funding supporting the initiative – EU, BMGF, USAID (FSP IL), Food Trade, Univ. Pretoria, Michigan State Univ., Univ. of Missouri etc.
- Country modules hosted & updated by ReNAPRI institutes
- 3 Regional conferences (Lusaka, Mozambique, Nairobi) and 30 Nov 2017Cape Town!!



ReNAPRI PE coverage

	SA	ZAM	MOZ	MAL	KEN	TAN	DRC	UGD	ZIM
Maize	X	x	x	x	x	x	x	x	x
Wheat	X	x			x	x		x	
Rice	X		x			x			
Soya	X	x		x					
Sugar	X	x				x			





RENAPRI PE TRAINING

Feed the Future Innovation Lab for Food Security Policy

ACKNOWLEDGEMENT

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The contents of this presentation are the responsibility of the study authors and do not necessarily reflect the views of USAID or the United States government.





Sokoine - Morogoro, Tanzania, July 2015



CEPPAG Maputo, Mozambique, Aug 2016



FAPRI Missouri, USA, July 2016

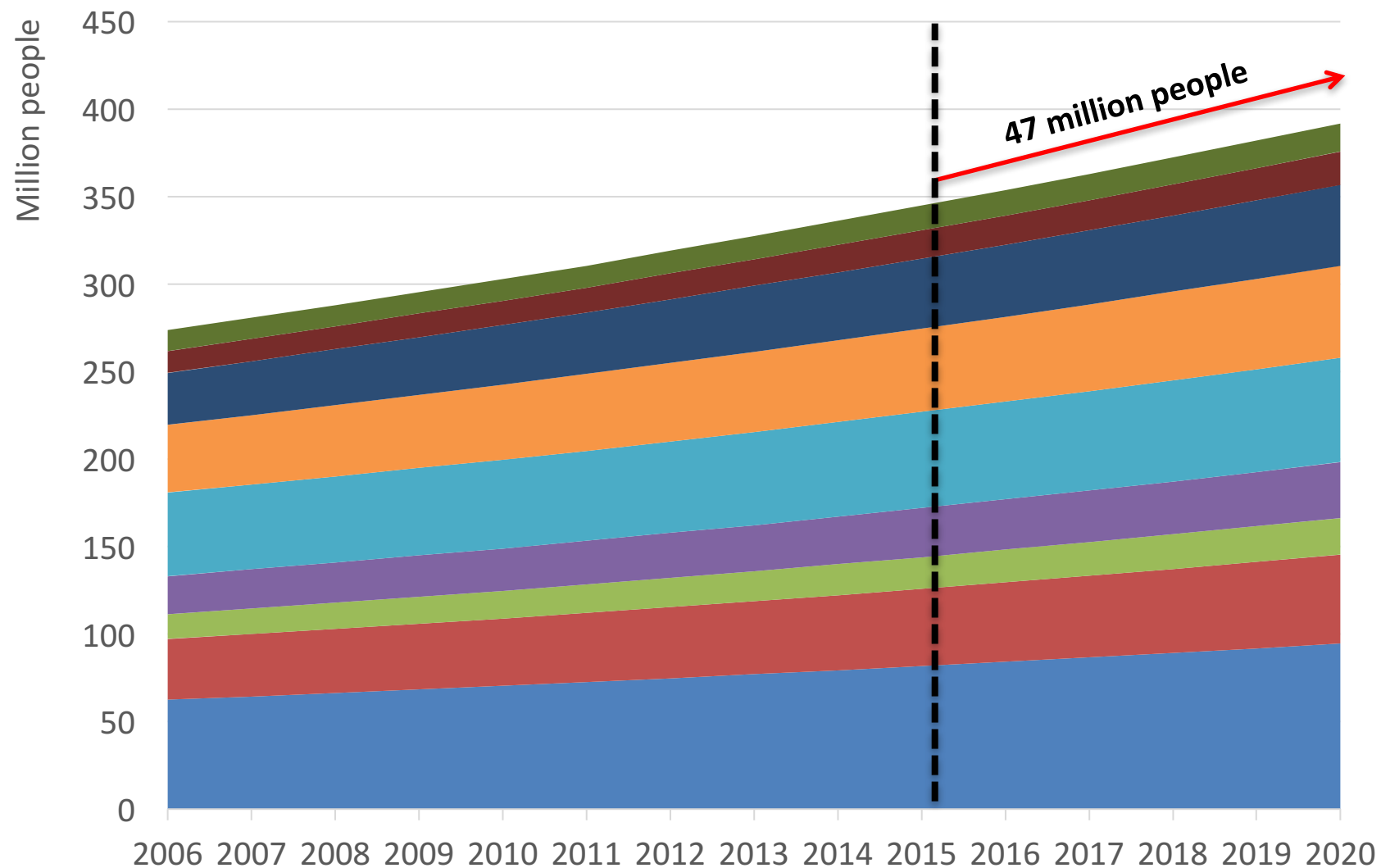


Starting with an end in mind!!



Baseline Assumptions: Population

Population Growth



Growth to 2020

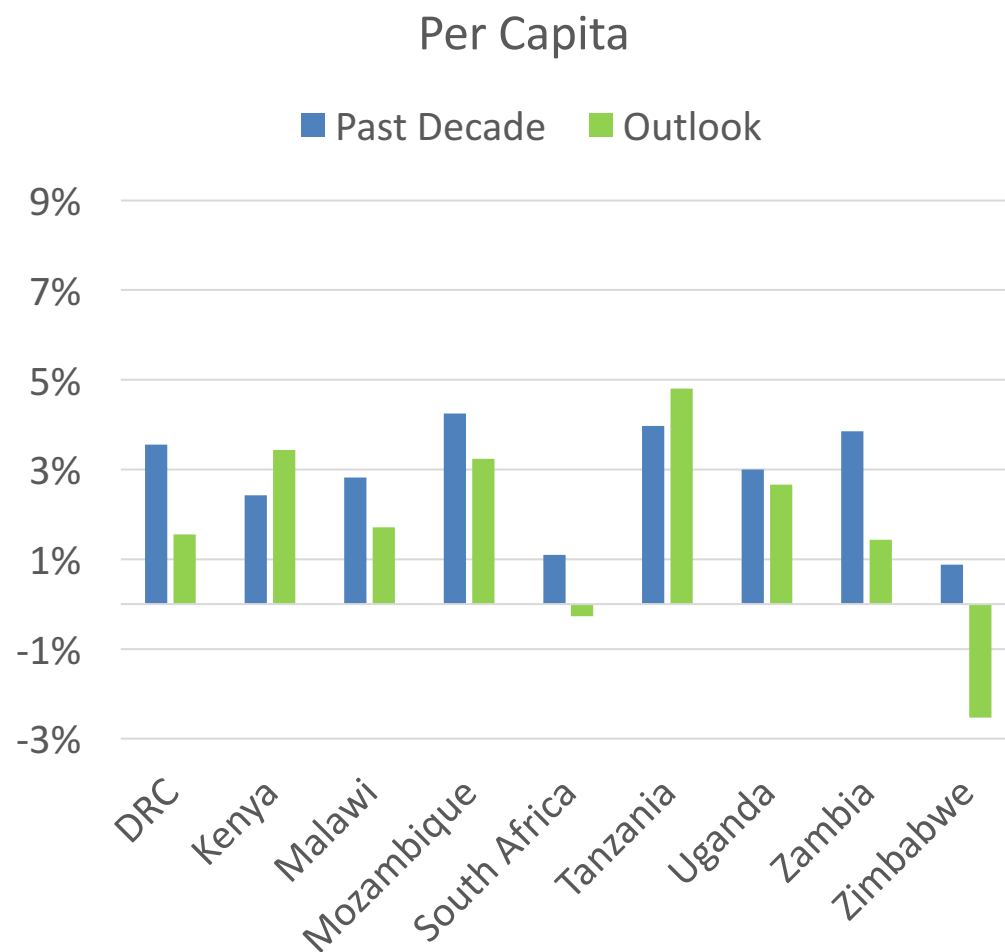
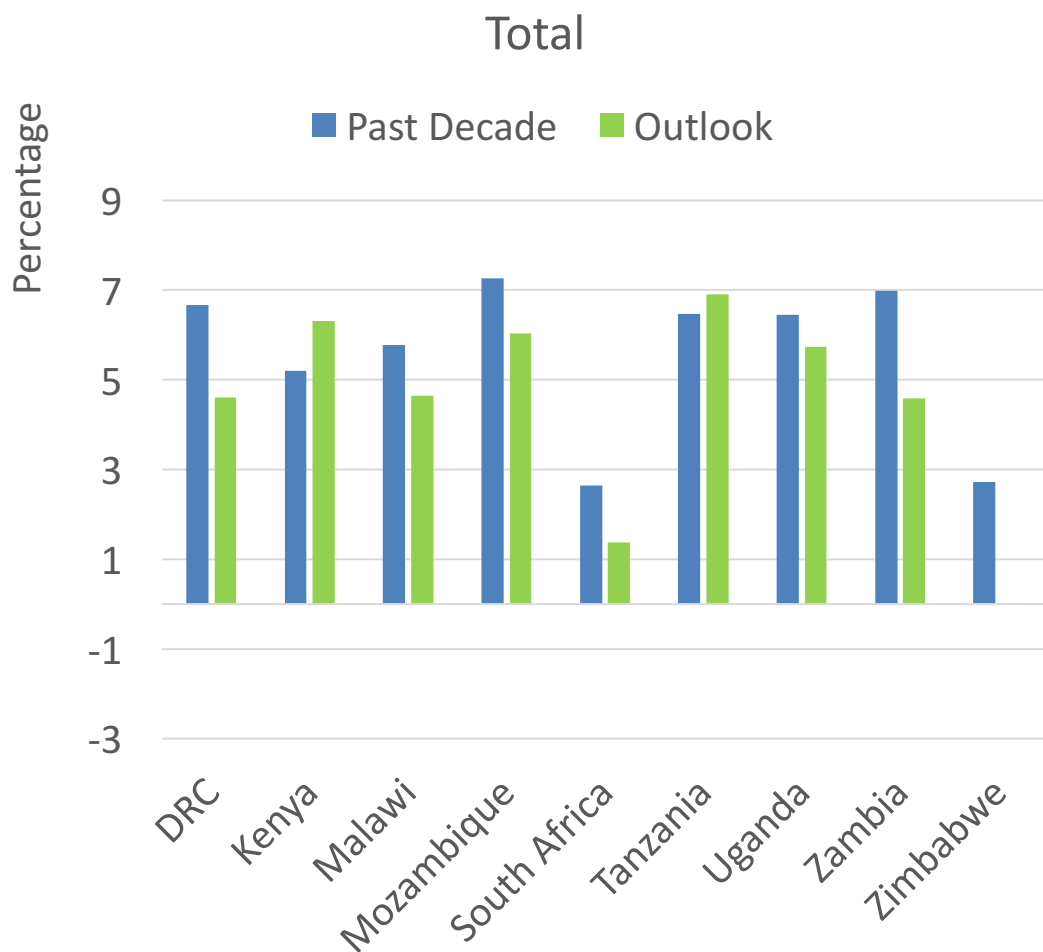
- Zimbabwe (14%)
- Zambia (16%)
- Uganda (16%)
- Tanzania (10%)
- South Africa (9%)
- Mozambique 14%)
- Malawi (15%)
- Kenya (15%)
- DRC (16%)

Source: IMF, 2016



Baseline assumptions: Growth

Growth in real GDP: Outlook vs. Past Decade



Source: IMF, 2016



Production, Trade and Prices



- Kenya
- Tanzania
- Uganda

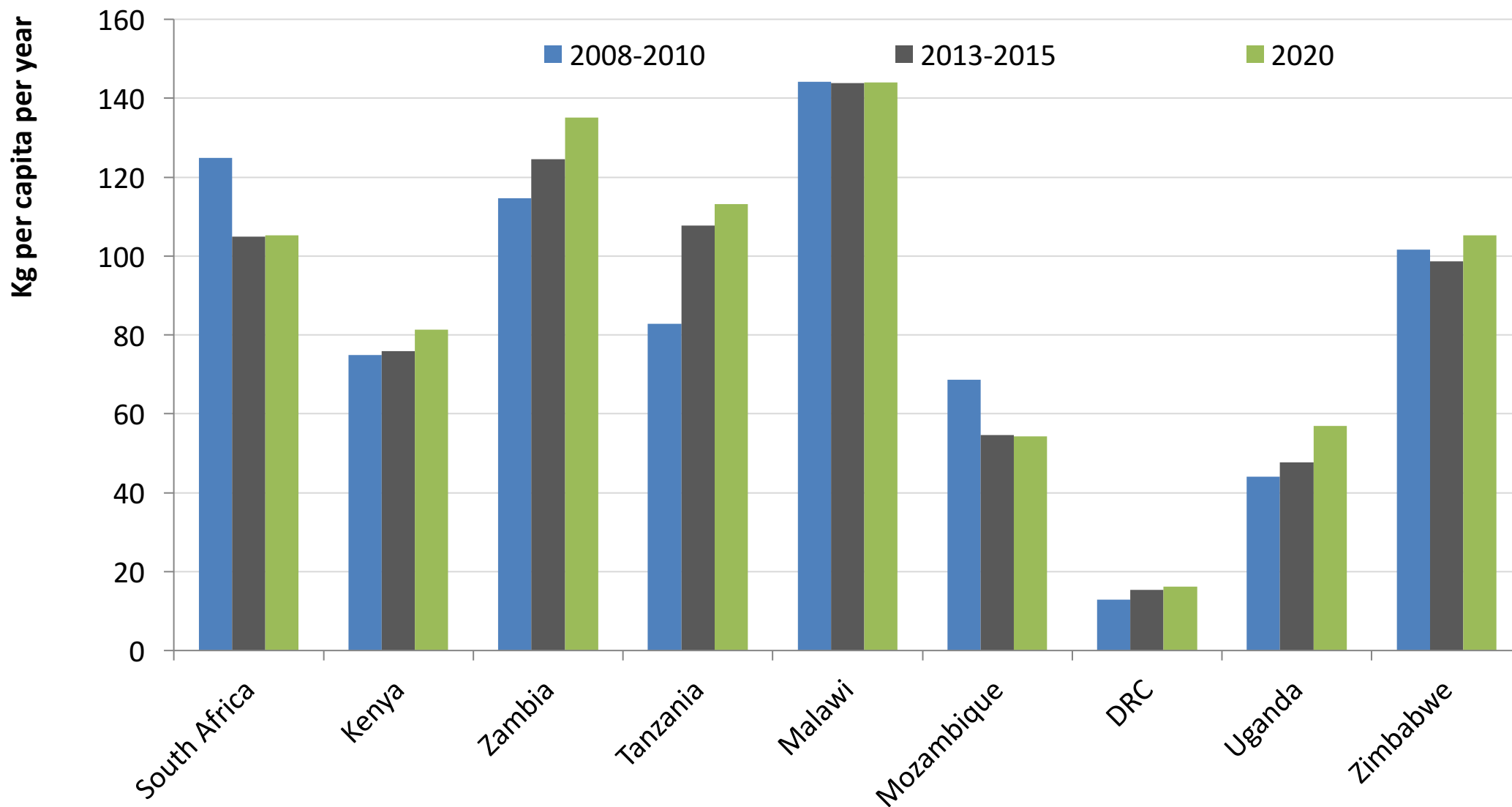
- Malawi
- Mozambique
- South Africa

- Zambia
- Zimbabwe
- DRC



Demand: Maize

Per capita maize consumption

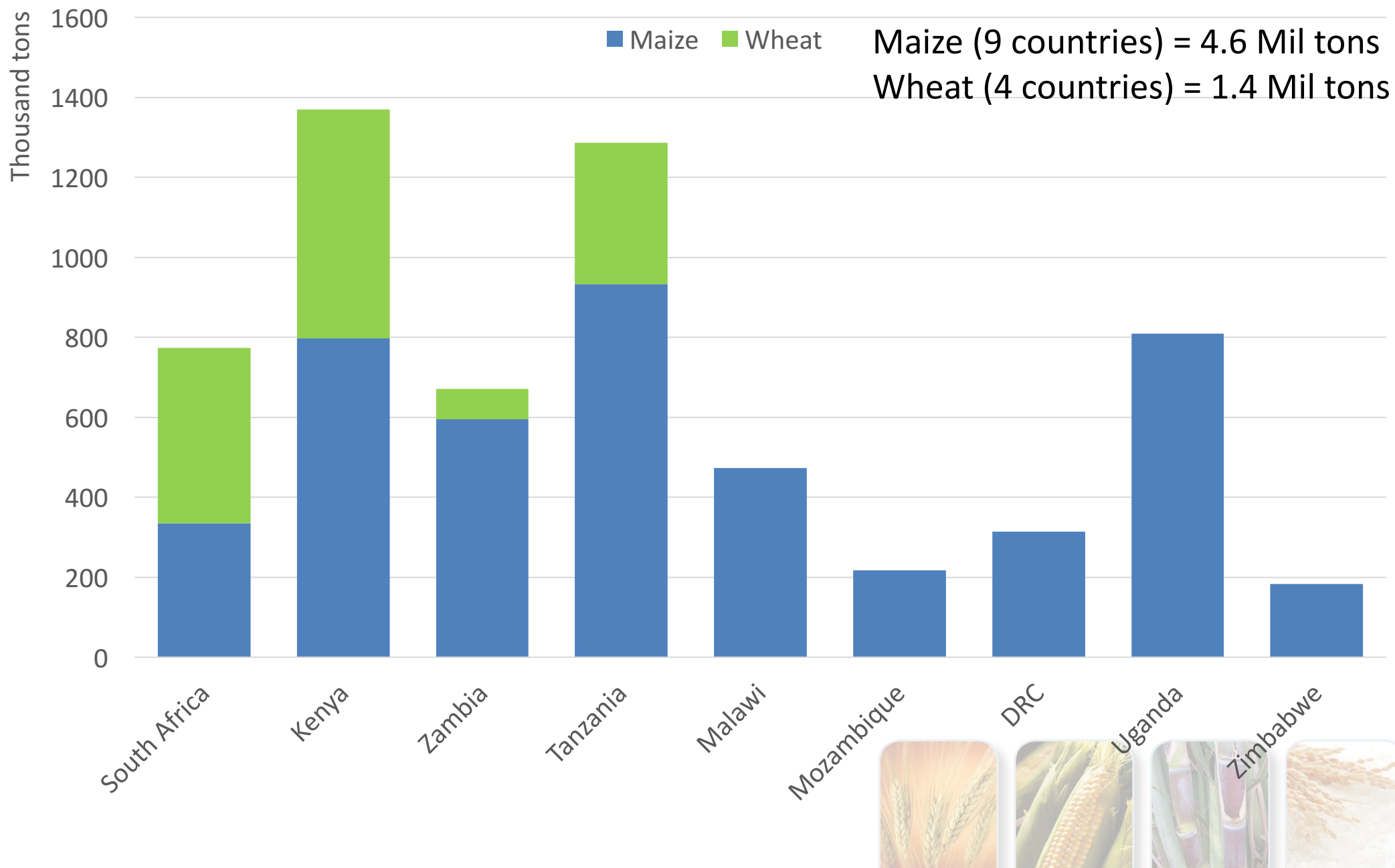


Total Food Demand: **4.6 Mil ton** additional maize by 2020

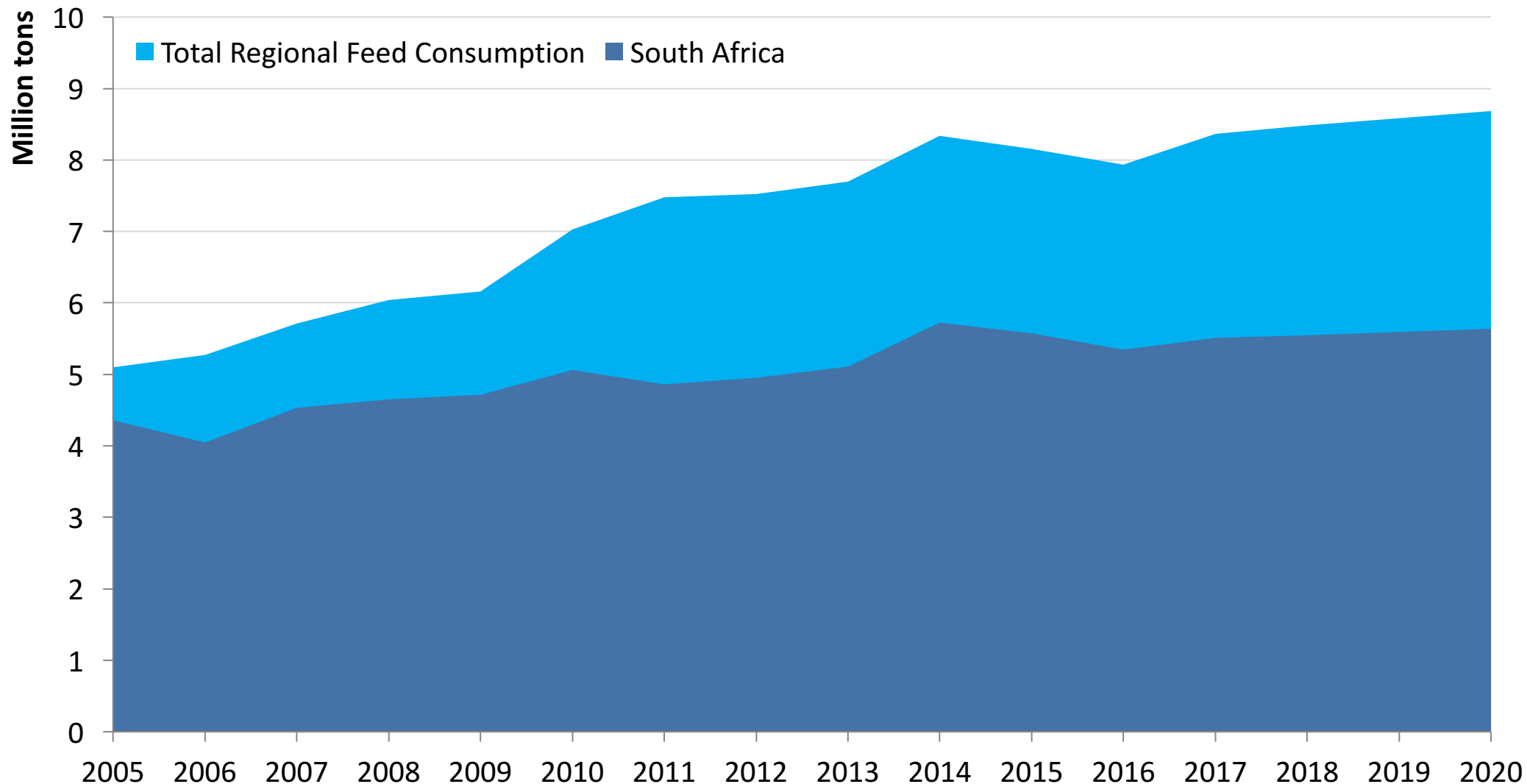


Significant growth in food use

Growth in consumption: 2020 vs. 2013-2015

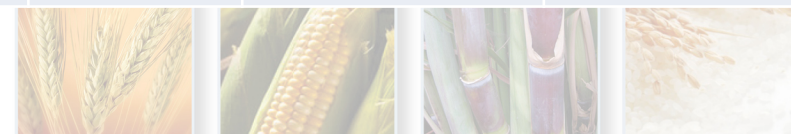


Feed consumption

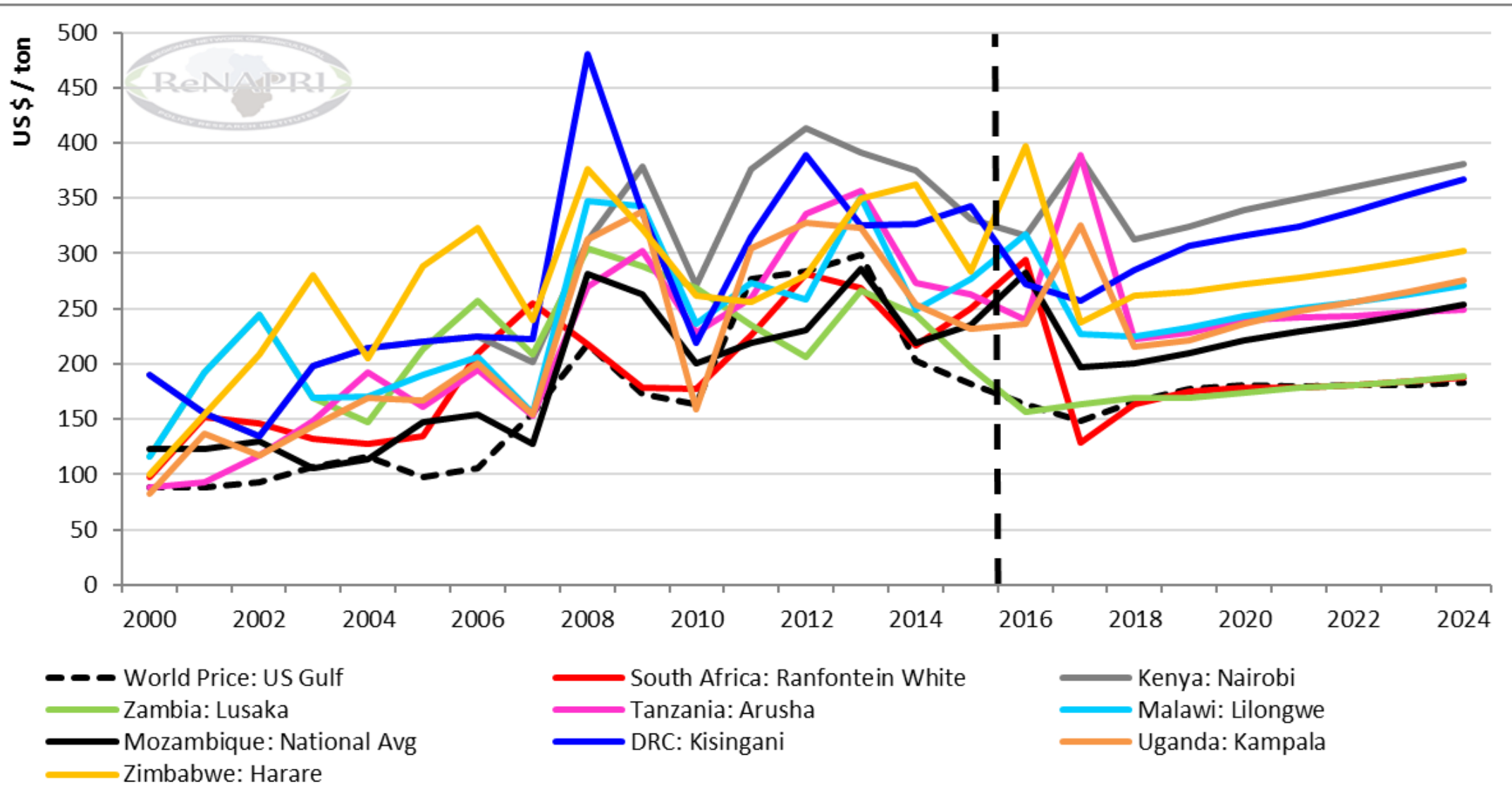


Production growth

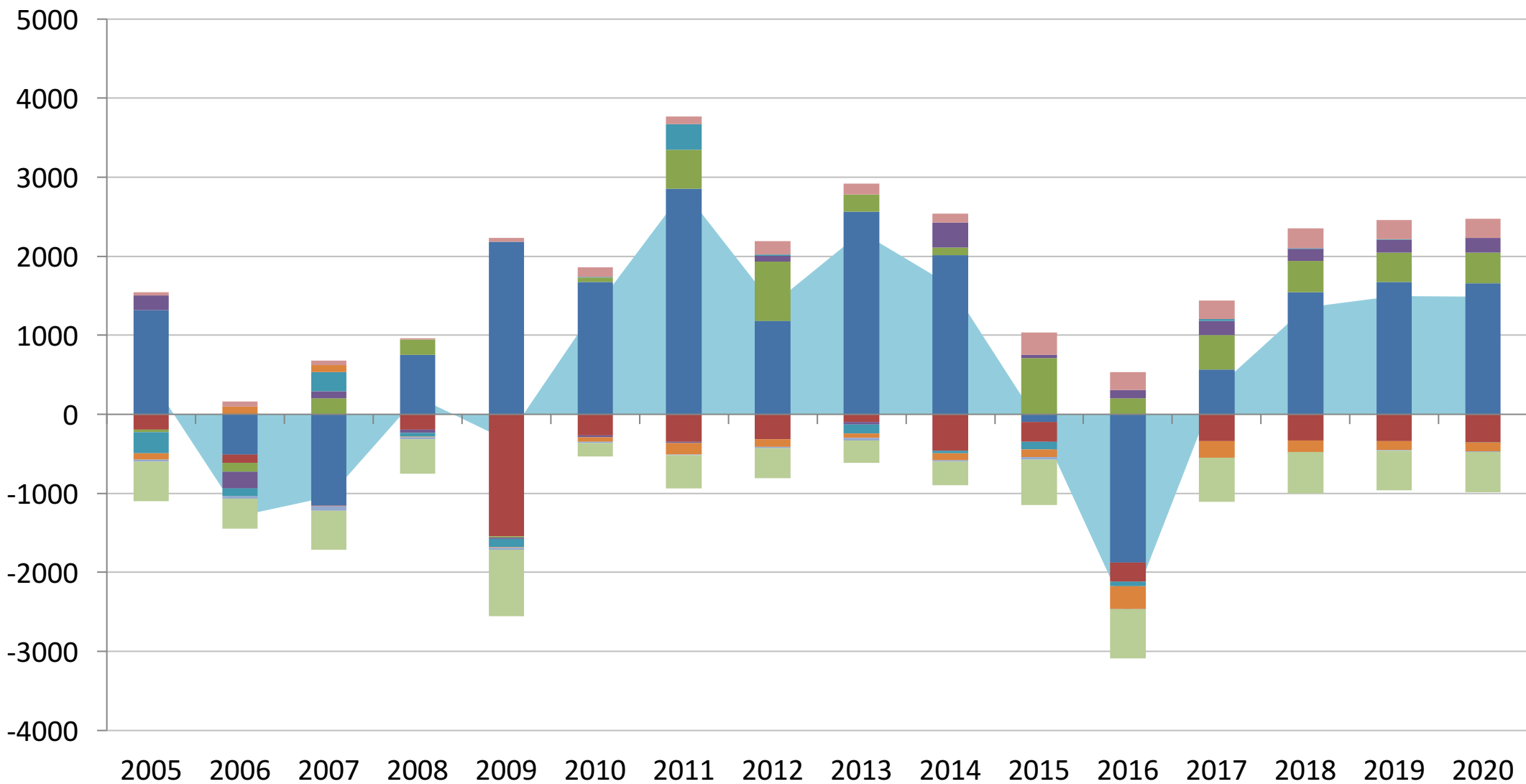
	Avg. annual growth Past Decade (2004-2015)		Avg. annual growth Outlook (2016-2020)		Absolute Growth Maize area planted		Absolute Growth Yields	
	Area Expansion	Yield Growth	Area Expansion	Yield Growth	2012-2014 '000 ha	2020 '000 ha	2012-2014 t/ha	2020 t/ha
South Africa	-1.5%	2.4%	-0.25%	8.52%	3 158	2651	4.24 t/ha	5.03 t/ha
Zambia	6.1%	3.6%	1.58%	5.13%	1 335	1453	2.19 t/ha	2.53 t/ha
Kenya	2.6%	0.7%	1.96%	1.27%	2 132	2358	1.70 t/ha	1.85 t/ha
Tanzania	5.4%	2.5%	1.26%	2.89%	4 180	4158	1.37 t/ha	1.73 t/ha
Malawi	-0.3%	2.2%	-0.16%	6.94%	1 363	1444	2.19 t/ha	2.46 t/ha
Mozambique	0.7%	-0.4%	3.65%	3.98%	1 615	1618	1.06 t/ha	1.14 t/ha
DRC	1.6%	0.1%	3.01%	0.29%	1 467	1842	0.83 t/ha	0.88 t/ha
Uganda	3.8%	5%	2.32%	2.72%	1 098	1264	2.50 t/ha	2.88 t/ha
Zimbabwe	-0.5%	-1.7%	-0.80%	14.90%	1 579	1499	0.68 t/ha	0.82 t/ha



Baseline Prices: Maize



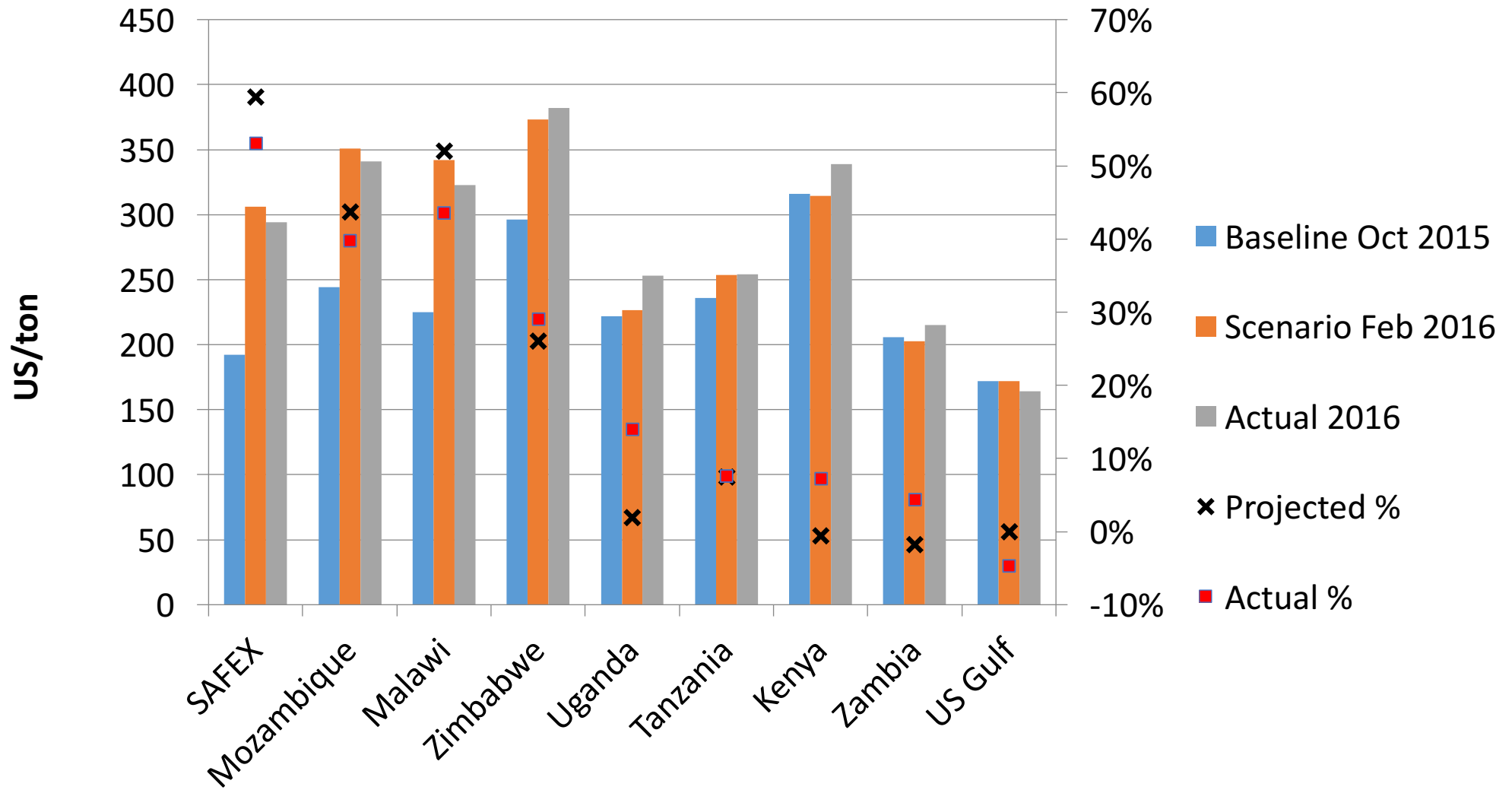
Maize Trade: Regional Overview



- Total Net Trade
- South Africa
- Kenya
- Zambia
- Tanzania
- Malawi
- Mozambique
- DRC
- Uganda
- Zimbabwe



Impact of 2015/16 drought





Thank you!



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