



GIEWS Country Brief

The Kingdom of Bhutan

Reference Date: 01-August-2024

FOOD SECURITY SNAPSHOT

- Area planted with cereal crops in 2024 forecast at below-average level
- Cereal import requirements for 2024/25 marketing year (July/June) forecast at above-average level

Area planted with 2024 cereal crops forecast at below-average level

Planting of the 2024 paddy crop, for harvest at the end of the year, is ongoing and will conclude in August, while planting of the 2024 maize crop finalized last March, with harvesting expected to start from August onwards. The area planted with both crops is set to be below the five-year average, due to a shift in the use of land to more profitable vegetables and cash crops as well as to infrastructure projects. After generally below-average precipitation amounts in April and May, rains resumed from mid-June and together with adequate irrigation water availability, provided conducive growing conditions for paddy and maize crops and bolstering yields expectations.

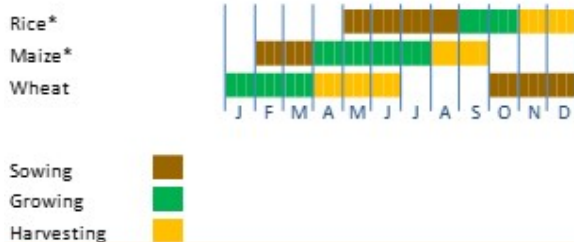
Cereal import requirements are forecast at above-average level in 2024/25 marketing year

The country relies heavily on cereal imports, mostly from India, as local production covers only about two-thirds of the national consumption needs. Cereal imports consist mostly of rice plus small quantities of maize and wheat. In the 2024/25 marketing year (July/June), total cereal import requirements are forecast at an above-average level of about 165 000 tonnes, continuing the steadily increasing trend observed during the last seven years, reflecting low domestic maize and rice production and increasing levels of human consumption.

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Crop Calendar

(*major foodcrop)



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Cereal Production

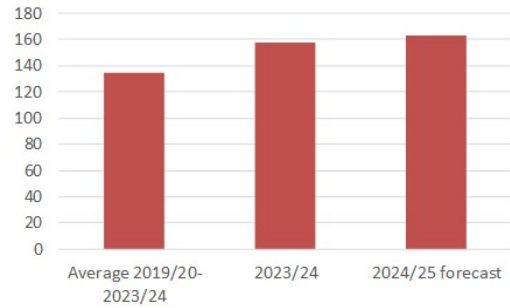
	2019-2023	2023	2024	change
	average		estimate	2024/2023
000 tonnes				
				percent
Rice (paddy)	45	40	40	0.0
Maize	34	25	25	-0.5
Wheat	1	1	1	7.5
Others	5	3	3	0.0
Total	85	69	69	-0.1

Note: Percentage change calculated from unrounded data.

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Cereals Imports

000 tonnes



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

This brief was prepared using the following data/tools:

FAO/GIEWS Country Cereal Balance Sheet (CCBS) <https://www.fao.org/giews/data-tools/en/>.

FAO/GIEWS Food Price Monitoring and Analysis (FPMA) Tool <https://fpma.fao.org/>.

FAO/GIEWS Earth Observation for Crop Monitoring <https://www.fao.org/giews/earthobservation/>.

Integrated Food Security Phase Classification (IPC) <https://www.ipcinfo.org/>.



GIEWS Country Brief The Kingdom of Bhutan

Reference Date: 13-March-2024

FOOD SECURITY SNAPSHOT

- Below-average cereal output obtained in 2023
- Cereal import requirements projected to continue to increase in 2023/24 marketing year (July/June)
- Prices of wheat flour at high levels in December 2023

Below-average cereal output obtained in 2023

Harvesting of the 2023 main cereal crops, which account for 90 percent of the annual production and consist mostly of paddy and maize, finalized last October and the output is estimated at 70 000 tonnes, almost 30 percent below the five-year average. The low cereal output is similar to the 2022 harvest and reflects the gradual reduction in sowings of paddy and maize since 2017, following a shift into the use of land to more profitable vegetables and cash crops or infrastructure. However, yields of both crops are estimated at an above-average level, supported by conducive weather conditions throughout the cropping season. Localized crop losses occurred in some minor cereal producing areas in southwestern and northeastern parts of the country due to dry weather conditions as well as in Lhuntse District in the northwest due to flash floods and landslides in mid-July 2023.

Cereal import requirements projected to continue to increase in 2023/24

The country relies heavily on cereal imports, mostly from India, as local production covers only about two-thirds of the total national consumption. Cereal imports consist mostly of rice plus small quantities of maize and wheat. In the 2023/24 marketing year (July/June), total cereal import requirements are estimated at an above-average level of 160 000 tonnes, continuing the steadily increasing trend observed during the last six years, reflecting low domestic maize and rice production and increasing human consumption.

Prices of wheat flour at high levels in December 2023

Domestic prices of wheat flour increased sharply from September 2022 to August 2023, when they reached record levels due to tight market availability following import disruptions associated with the implementation by the Government of India in

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Cereal Production

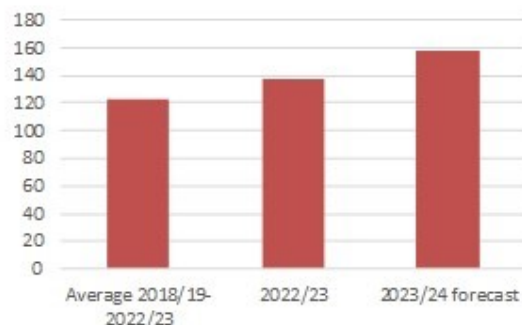
	2018-2022 average	2022	2023 forecast	change 2023/2022
	000 tonnes			percent
Rice (paddy)	50	41	40	-2.6
Maize	40	26	26	0.1
Millet	2	1	1	0.0
Others	5	3	3	0.0
Total	96	71	70	-1.5

Note: Percentage change calculated from unrounded data.

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Cereals Imports

000 tonnes



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

May 2022 of a ban on wheat exports. High transport costs also contributed to price increases. Then, prices steadily declined between September and December 2023, reflecting the gradual improvement of market supply following the decision of the Government of India to approve exports of about 14 000 tonnes of wheat and 5 300 tonnes of wheat flour until April 2024, meeting the country's annual consumption needs. In December 2023, wheat flour prices remained 50 percent higher than the elevated levels a year earlier.

According to the National Bureau of Statistics, the annual food inflation rate was 6.2 percent in December 2023, well above the rate of 12 months before, mostly reflecting high domestic prices of cereals, dairy products and vegetables.

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Integrated Food Security Phase Classification (IPC) <https://www.ipcinfo.org/>.



GIEWS Country Brief The Kingdom of Bhutan

Reference Date: 29-September-2023

FOOD SECURITY SNAPSHOT

- Below-average cereal production forecast in 2023 mostly due to shortage of agricultural inputs
- Cereal import requirements projected to continue to increase in 2023/24 marketing year (July/June)
- Prices of wheat flour higher than a year earlier in June 2023

Below-average cereal production forecast in 2023

Harvesting of the 2023 main cereal crops, primarily rice and maize, accounting for 90 percent of the annual production, is expected to start in October. Precipitation amounts were adequate since the start of the season and had a positive effect on yields. In a few minor cereal producing areas in southwestern and northeastern parts of the country, precipitation amounts have been below average, curtailing the extent of sowings and affected yields. In Lhuntse District in the northwest, heavy rainfall in mid-July triggered flash floods and landslides, causing localized crop losses and damage to housing and infrastructure. Disaggregated by crops, production of rice and maize in 2023 is forecast at below-average level of 40 000 tonnes and 26 000 tonnes, respectively.

According to weather forecasts, below-average precipitation amounts are likely between October and December 2023 over southern and central parts of the country that may hinder planting operations and establishment of the 2024 main wheat and barley crops.

Cereal import requirements projected to continue to increase in 2023/24

The country relies heavily on cereal imports, mostly from India, as local production covers only about two-thirds of the total national consumption. Cereal imports consist mostly of rice and small quantities of maize and wheat. In the 2023/24 marketing year (July/June), total cereal import requirements are estimated at an above-average level of almost 140 000 tonnes, continuing the steady increase observed during the last six consecutive years, mainly reflecting the demographic growth and the below-average output of maize and rice output.

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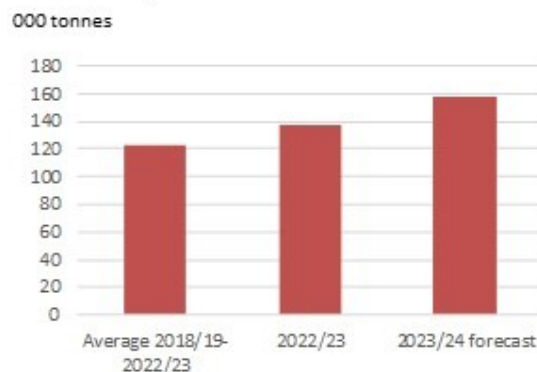
Cereal Production

	2018-2022 average	2022	2023 forecast	change 2023/2022
	000 tonnes			percent
Rice (paddy)	50	41	40	-2.6
Maize	40	26	26	0.1
Millet	2	1	1	0.0
Others	5	3	3	0.0
Total	96	71	70	-1.5

Note: Percentage change calculated from unrounded data.

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Cereals Imports



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

Prices of wheat flour higher than a year earlier in June 2023

Reflecting the price trends in India, domestic prices of wheat flour have increased steadily throughout 2022 and have remained overall stable afterwards. In June 2023, wheat flour prices were 7 percent higher than a year earlier.

According to the National Bureau of Statistics, the annual food inflation was 5.4 percent in July 2023, about the same rate of 12 months before.

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Integrated Food Security Phase Classification (IPC) <https://www.ipcinfo.org/>.



GIEWS Country Brief Bhutan

Reference Date: 08-March-2022

FOOD SECURITY SNAPSHOT

- Cereal production in 2021 estimated at below-average level
- Cereal import requirements in 2021/22 marketing year (July/June) estimated at above-average level
- Income losses due to COVID-19 pandemic raise concerns regarding access to food

Aggregate cereal production in 2021 estimated at below-average level

The 2021 cropping season finalized last November and the aggregate cereal production, mostly rice and maize, is estimated at about 123 000 tonnes, 12 percent below the five-year average. The decrease in output reflects the steady reduction in the area planted for both rice and maize as farmers prefer to grow more profitable quinoa, vegetables and spice crops. Localized damages to standing crops, mostly paddy in the low-lying areas, were reported in the minor northwestern producing districts due to floods following heavy rains in June 2021.

Cereal import requirements in 2021/22 estimated at above-average level

The country relies heavily on cereal imports, mostly from India, as local production covers only about two-thirds of the total national consumption. Cereal imports consist mostly of rice and small quantities of maize and wheat. In the 2021/22 marketing year (July/June), total cereal import requirements are estimated at an above-average level of 114 000 tonnes, mainly reflecting the demographic growth and the reduced output of paddy in 2021.

COVID-19 pandemic continues to affect livelihoods of large number of people

Most households in the country are food secure. However, pockets of food insecurity conditions persist in some rural areas, especially in eastern and southern parts of the country, where a large number of households consume poor quality foods, mainly due to inadequate access to the food markets. Across the country, the food security conditions for most vulnerable households have deteriorated since the beginning of the COVID-19 pandemic due to income losses and the strong decrease in remittance inflows, which reduced households'

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Cereal Production

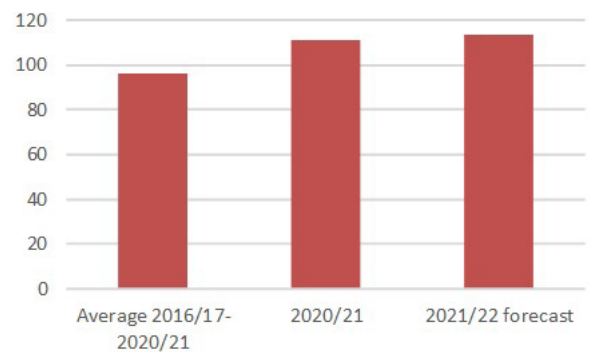
	2016-2020 average	2020	2021 estimate	change 2021/2020
	000 tonnes			percent
Rice (paddy)	68	55	60	9.1
Maize	64	41	55	34.3
Wheat	2	2	2	23.2
Others	6	5	6	27.0
Total	139	102	123	20.2

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

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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.

purchasing capacity and restricted access to food.

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GIEWS Country Brief Bhutan

Reference Date: 21-December-2020

FOOD SECURITY SNAPSHOT

- Aggregate cereal production in 2020 estimated slightly above average
- Cereal import requirements in 2020/21 marketing year (July/June) estimated at below-average level
- COVID-19 pandemic causes income losses and raises concerns regarding access to food

Aggregate cereal production in 2020 estimated slightly above average

The 2020 cropping season was concluded in November and aggregate cereal production, mostly rice and maize, is estimated at about 190 000 tonnes, slightly above the average level. The June-September monsoon (rainy) season was characterized by average to above-average precipitation amounts over the main cereal producing areas, benefiting planting activities and crop development. Localized damages to standing crops, mostly paddy in the low-lying areas, were reported in the Sarpang District due to floods as heavy rainfall caused the overflow of the Mao River tributaries. Overall, the 2020 paddy and maize production is estimated at an above-average level.

Cereal import requirements in 2020/21 estimated at below-average level

The country relies heavily on imports, mostly from India, as local production covers only about two-thirds of the total national cereal consumption. In the 2020/21 marketing year (July/June), total cereal import requirements are estimated below the five-year average.

COVID-19 pandemic causes income losses and raises concerns regarding access to food

Most households in the country are food secure. However, pockets of food insecurity conditions persist in some rural areas, especially in eastern and southern parts of the country. Here, a large number of households consume poor quality foods, mainly due to inadequate access to the food markets. The food security conditions for most vulnerable households may deteriorate further owing to the negative impact of the COVID-19 pandemic. This is due to income losses associated with the COVID-19-related economic downturn and a strong decrease in

remittances inflows, which amid high domestic prices of essential commodities such as rice and vegetables, raises concerns regarding households' capacity to purchase foods.

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GIEWS Country Brief Bhutan

Reference Date: 05-May-2020

FOOD SECURITY SNAPSHOT

- Favourable production prospects for 2020 minor winter crops
- Aggregate cereal output in 2019 estimated at above average level
- Cereal import requirements in 2019/20 marketing year (July/June) forecast below average
- Food insecurity conditions persist in most rural areas

Favourable production prospects for 2020 minor winter crops

Production prospects for the 2020 minor winter wheat and barley crops, for harvest in June, are generally favourable. The planted area is estimated at an above average level, supported by strong local demand. Since the beginning of the season in October, precipitation amounts have been near average over most of the country and the snow coverage during the winter months has been adequate to protect crops from winterkill. As of early April, remote sensing data shows above average vegetation conditions throughout the country (see VHI map), inferring generally favourable yield prospects for the wheat and barley crops.

Cereal import requirements in 2019/20 forecast below average

The country relies heavily on imports to satisfy its domestic needs as local production covers only about two-thirds of the total national cereal consumption. In the 2019/20 marketing year (July/June), total cereal import requirements are forecast at 81 000 tonnes, 7 percent below the five-year average. Rice imports are expected at 75 000 tonnes in 2020 calendar year and wheat import requirements are forecast at an average level of 9 000 tonnes in the 2019/20 marketing year.

Food insecurity conditions persist in most rural areas

Food insecurity persists mostly in rural areas, especially in eastern and southern parts of the country. A large number of households rely on diets with poor quality, mainly due to inadequate access to food markets. According to the latest data by WFP, as of February 2020, over 20 percent of the children between 6 and 59 months suffer from chronic malnutrition.

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Cereal Production

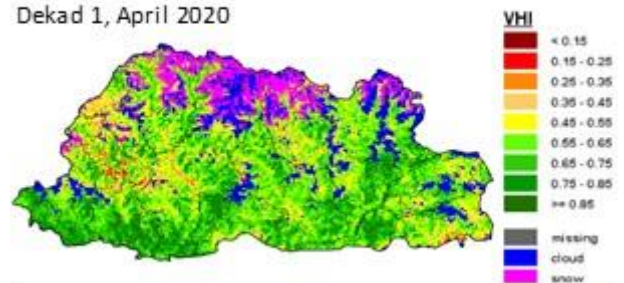
	2014-2018 average	2018	2019 forecast	change 2019/2018
	000 tonnes			percent
Maize	85	93	93	0.1
Rice (paddy)	83	88	86	-2.3
Wheat	4	4	4	-1.0
Others	6	6	6	-1.6
Total	178	191	189	-1.1

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Bhutan - Vegetation Health Index (VHI)

Dekad 1, April 2020



Source: FAO/GIEWS Earth Observation System.

Aggregate cereal output in 2019 estimated at above-average level

The 2019 aggregate cereal production, mostly rice and maize, is estimated at 189 000 tonnes, 6 percent higher than the five-year average. The 2019 maize and paddy outputs are estimated at 93 000 and 86 000 tonnes, respectively, reflecting above-average plantings driven by strong local demand and above-average yields boosted by favourable weather conditions. Localized damages to standing paddy crops were reported in southern parts of the country, due to floods following heavy rains in late June and July.

The output of other minor crops such as millet, barley and wheat, is estimated at near-average levels.

COVID-19 and measures adopted by the Government

As of late April 2020, there were seven COVID-19 confirmed cases, five of which have been hospitalized. The cases reported are two tourists and five nationals who returned from abroad.

On 22 March 2020, as a measure to prevent the spread of the virus, the Government imposed restrictions on international and national travels, prohibited large gatherings of people and closed schools and universities. The Transportation of goods and agricultural activities are authorized to continue in order to ensure adequate market availabilities.

There are concerns related to the effects of the virus on food prices as a result of panic-buying, hoarding and the potential disruption of movement of food supplies. On 11 March 2020, the Government has imposed price control measures in order to avoid price spikes for several essential foods, including vegetables and chili. In an attempt to ensure the uninterrupted supply of essential items at reasonable prices, the Ministry of Economic Affairs authorized the provision of loans at a 5 percent interest rate for wholesale distributors for a period of a maximum of six months.

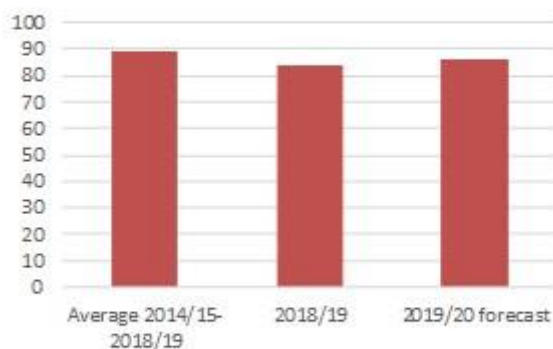
Within the overall umbrella of the Economic Stimulus Plan, the Ministry of Agriculture and Forest has developed its own stimulus plan to alleviate the impact of the virus. To help the Ministry implement its stimulus plan, the Department of Agriculture and FAO have developed a Technical Cooperation Programme (TCP) on urban and peri-urban vegetable production. The main purpose of this TCP is to increase local vegetable production and employ about 200 laid-off workers from the private sector following the COVID-19 pandemic.

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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 Bhutan

Reference Date: 27-March-2019

FOOD SECURITY SNAPSHOT

- Favourable prospects for 2019 minor winter crops
- Aggregate cereal output in 2018 estimated above average
- Cereal import requirements in 2018/19 marketing year (July/June) forecast below average
- Food insecurity conditions persist in most rural areas

Favourable prospects for 2019 minor winter crops

Production prospects for the 2019 minor wheat and barley winter crops, for harvest in June, are currently favourable. Near average and well-distributed rains since October 2018 have supported planting activities and early crop development. Recent remote sensing data exhibits favourable vegetation conditions throughout the country (see Vegetation Health Index map).

Aggregate cereal output in 2018 estimated above average

The 2018 cropping season was completed in November 2018 and aggregate cereal production, mostly rice and maize, is estimated at 187 100 tonnes, virtually unchanged from the above-average output in 2017. The 2018 paddy and maize outputs are estimated at 88 000 and 90 000 tonnes, respectively, reflecting higher yields supported by favourable weather conditions since May through October 2018 and near-average plantings. The output of other minor crops such as millet, barley and wheat, is estimated at near-average levels.

Cereal import requirements in 2018/19 forecast below average

The country relies heavily on imports to satisfy its domestic needs as local production covers only about two-thirds of the total national cereal consumption. In the 2018/19 marketing year (July/June), total cereal import requirements are forecast at 82 500 tonnes, 7 percent below the five-year average. The decrease mainly reflects a slowdown in rice imports, which are expected at 70 000 tonnes, 10 percent below the average, due to ample local availabilities from the bumper paddy output in 2018. By contrast, wheat import requirements are forecast at an average of 9 000 tonnes.

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Cereal Production

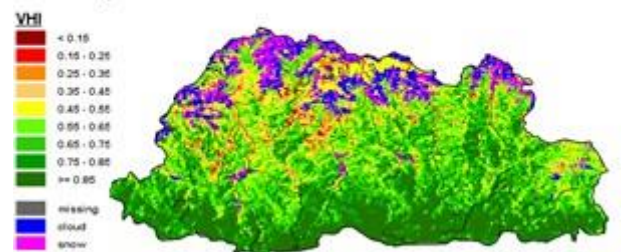
	2013-2017	2017	2018	change
	average			estimate
000 tonnes				
Rice (paddy)	81	86	88	1.9
Maize	79	90	90	-0.3
Wheat	4	4	3	-21.4
Others	6	6	6	0.0
Total	171	187	187	0.3

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Bhutan - Vegetation Health Index

Dekad 1, March 2019



Source: FAO/GIEWS Earth Observation System.

Food insecurity conditions persist in most rural areas

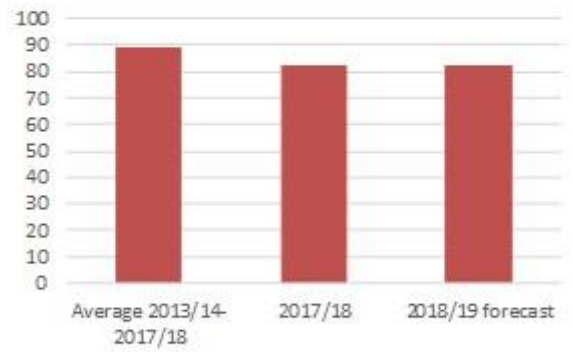
Food insecurity persists mostly in rural areas, especially in eastern and southern parts of the country. According to the 2018 Country Strategic Plan of the World Food Programme (WFP), about 40 percent of the rural households rely on diets of poor quality, mainly due to inadequate access to the food markets.

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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 Bhutan

Reference Date: 09-March-2018

FOOD SECURITY SNAPSHOT

- Positive prospects for minor wheat and barley crops
- Above-average cereal harvest gathered in 2017
- Cereal import requirements in 2017/18 marketing year forecast close to average levels
- Food insecurity conditions persist in most rural areas

Positive prospects for minor wheat and barley crops

The 2018 minor winter crops, mainly irrigated wheat and barley, are currently in the stem extension to heading stages and harvesting will start in June. Crops are in good condition and production prospects are positive on account of the favourable weather conditions and ample availability of irrigation water following abundant rains in the second half of 2017.

Above-average cereal harvest gathered in 2017

The 2017 national cereal output is estimated at 198 000 tonnes, 3 percent above the previous year's bumper level. Of the total, maize is estimated to have accounted for 86 000 tonnes, a new record level, 5 percent up from the previous high in 2016. This is mostly attributed to an expansion in plantings supported by Government initiatives to support domestic maize production, including provision of hybrid seeds, fencing and mechanization infrastructure. Paddy output is estimated to at 87 000 tonnes, slightly above the previous year's above-average level. The output of other minor crops, such a millet, barley and wheat, remained unchanged from the 2016 good levels.

Cereal import requirements in 2017/18 forecast close to average level

In the 2017/18 marketing year (July/June), cereal import requirements are forecast at 92 500 tonnes. Imports consist mainly of rice and wheat, which are forecast at 80 000 and 9 000 tonnes, respectively.

Food insecurity conditions persist in most rural areas

Food insecurity persists mostly in rural areas, especially in eastern and southern parts of the country.

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Cereal production				
	2012-2016 average	2016	2017 estimate	change 2017/2016
	000 tonnes			percent
Rice (paddy)	79	85	87	2
Maize	77	82	86	5
Millet	7	7	7	0
Others	17	18	18	0
Total	181	192	198	3

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

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GIEWS Country Brief Bhutan

Reference Date: 10-July-2017

FOOD SECURITY SNAPSHOT

- Production prospects for 2017 cereal crops favourable
- Cereal import requirements in 2017/18 marketing year forecast at average levels
- Food insecurity conditions persist in most rural areas

Production prospects for 2017 cereal crops favourable

Harvesting of the 2017 minor winter season crops, mainly wheat and barley, is underway and will be completed by the end of July. Overall, the 2017 wheat and barley production is forecast to remain close to last year's high level, supported by favourable weather conditions during the growing season.

Planting of the 2017 main monsoon season paddy and maize crops is almost complete under generally favourable weather conditions. Assuming normal weather conditions for the remainder of the season, FAO forecasts the 2017 paddy and maize outputs at 80 000 tonnes and 86 000 tonnes, respectively.

Cereal import requirements in 2017/18 marketing year forecast close to average levels

Domestic cereal production meets only about 70 percent of the national cereal requirements. In the 2017/18 marketing year (July/June), total cereal imports are forecast close to last year's average level of 78 000 tonnes. Imports consist mainly of rice and wheat, which are forecast at 70 000 and 6 000 tonnes, respectively.

Food insecurity conditions persist in most rural areas

Food insecurity persists mostly in rural areas, especially in eastern and southern parts of the country.

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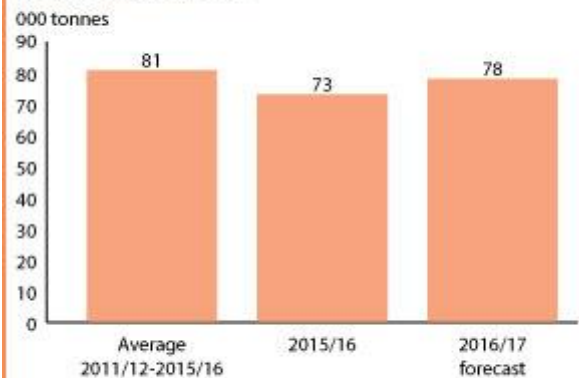
Cereal production

	2012-2016 average	2016	2017 forecast	change 2017/2016
	000 tonnes			percent
Maize	80	82	86	5
Rice (paddy)	78	80	80	0
Millet	7	7	7	0
Others	17	18	18	0
Total	183	187	191	2

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

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Total cereal imports



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



GIEWS Country Brief Bhutan

Reference Date: 05-July-2017

FOOD SECURITY SNAPSHOT

- Production prospects for 2017 cereal crops favourable
- Cereal import requirements in 2017/18 marketing year forecast at average levels
- Food insecurity conditions persist in most rural areas

Production prospects for 2017 cereal crops favourable

Harvesting of the 2017 minor winter season crops, mainly wheat and barley, is underway and will be completed by the end of July. Overall, the 2017 wheat and barley production is forecast to remain close to last year's high level, supported by favourable weather conditions during the growing season.

Planting of the 2017 main monsoon season paddy and maize crops is almost complete under generally favourable weather conditions. Assuming normal weather conditions for the remainder of the season, FAO forecasts the 2017 paddy and maize outputs at 80 000 tonnes and 86 000 tonnes, respectively.

Cereal import requirements in 2017/18 marketing year forecast close to average levels

Domestic cereal production meets only about 70 percent of the national cereal requirements. In the 2017/18 marketing year (July/June), total cereal imports are forecast close to last year's average level of 78 000 tonnes. Imports consist mainly of rice and wheat, which are forecast at 70 000 and 6 000 tonnes, respectively.

Food insecurity conditions persist in most rural areas

Food insecurity persists mostly in rural areas, especially in eastern and southern parts of the country. According to UNHCR, in early 2017, around 11 000 refugees from Bhutan still live in the refugee camps in eastern Nepal. The displaced population relies mostly on humanitarian assistance to cover its basic needs, including food and healthcare.

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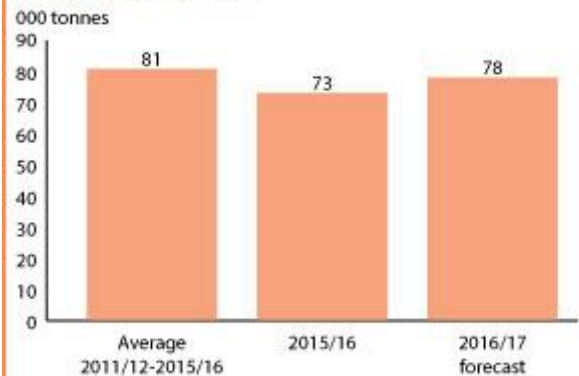
Cereal production

	2012-2016 average	2016	2017 forecast	change 2017/2016
	000 tonnes			percent
Maize	80	82	86	5
Rice (paddy)	78	80	80	0
Millet	7	7	7	0
Others	17	18	18	0
Total	183	187	191	2

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

Bhutan

Total cereal imports



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



GIEWS Country Brief Bhutan

Reference Date: 24-November-2016

FOOD SECURITY SNAPSHOT

- Above-average cereal harvest forecast in 2016
- Cereal import requirements in 2016/17 marketing year forecast at average levels
- Food insecurity conditions persist in most rural areas

Above-average cereal harvest forecast in 2016

Harvesting of the 2016 monsoon season cereal crops (rice, maize and millet) is ongoing and will continue until December. FAO's latest forecast for the 2016 aggregate cereal production stands at about 187 000 tonnes, 2 percent above last year's good level. Most of this increase reflects a larger rice output, which is expected to reach 80 000 tonnes, 3 percent up from the 2015 harvest. The 2016 maize production is forecast to increase slightly to 82 000 tonnes.

Cereal import requirements in 2016/17 marketing year forecast close to average levels

Total cereal import requirements in the 2016/17 marketing year (July/June) are forecast to return close to average levels reaching 78 000 tonnes. Imports consist mainly of rice and wheat, which are forecast at 70 000 and 6 000 tonnes, respectively.

Food insecurity conditions persist in most rural areas

Food insecurity persists mostly in rural areas, with higher concentrations in the eastern and southern parts of the country. UNHCR indicates that, as of June 2016, around 15 500 refugees from Bhutan are still living in refugee camps in eastern Nepal. These populations rely mostly on humanitarian assistance, including food aid, healthcare and other necessities.

Bhutan

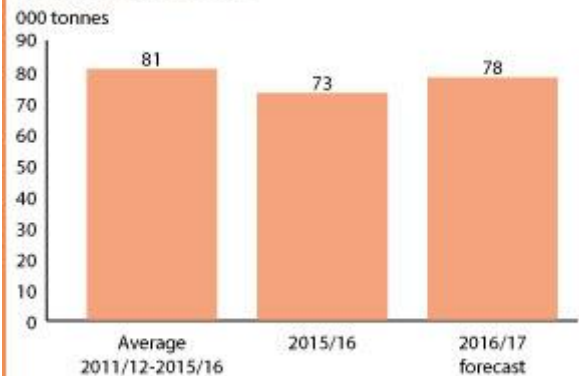
Cereal production

	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Maize	80	81	82	1
Rice (paddy)	78	78	80	3
Millet	7	7	7	0
Others	17	18	18	0
Total	182	184	187	2

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

Bhutan

Total cereal 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: 15-February-2016

FOOD SECURITY SNAPSHOT

- An above-average cereal harvest gathered in 2015
- Cereal imports in 2015/16 marketing year (July/June) forecast to decline
- Food insecurity persists in rural areas

Above-average cereal harvest gathered in 2015

Harvesting of the 2015 monsoon season cereal crops (rice, maize and millet) was completed in December. FAO's latest estimate for the 2015 aggregate cereal production stands at 183 900 tonnes, 2 percent above last year's above-average level. Most of this increase reflects a larger maize output, which is estimated at 81 000 tonnes, 4 percent up from the 2014 harvest. The 2015 rice production is estimated to have increased slightly to 78 000 tonnes.

Cereal imports in 2015/16 marketing year (July/June) forecast to decline

Total cereal imports in the 2015/16 marketing year (July/June) are forecast to contract by 8 percent to 79 000 tonnes, mainly reflecting the good 2015 harvests. Imports consist mainly of rice and wheat, which are forecast at 70 000 and 6 000 tonnes, respectively.

Food insecurity persists in rural areas

Food insecurity persists mostly in rural areas, with higher concentrations in the eastern and southern parts of the country. UNHCR indicates that as of November 2015 around 18 000 refugees from Bhutan are still living in refugee camps in eastern Nepal.

Bhutan

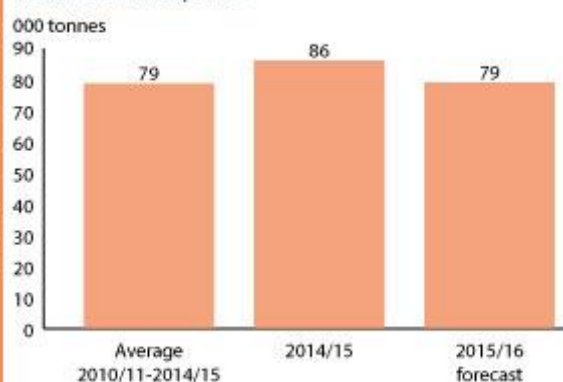
Cereal production

	2010-2014 average	2014	2015 estimate	change 2015/2014
	000 tonnes			percent
Rice (paddy)	77	77	78	1
Maize	75	78	81	4
Millet	6	7	7	0
Others	16	18	18	0
Total	175	180	184	2

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

Bhutan

Total cereal 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: 28-October-2015

FOOD SECURITY SNAPSHOT

- Cereal production in 2015 forecast to increase
- Cereal imports in 2015/16 marketing year (July/June) forecast to decline
- Food insecurity persists in rural areas

Cereal production in 2015 forecast to increase

Harvesting of the 2015 monsoon season cereal crops (rice, maize and millet) is currently underway and will continue until December. FAO's latest forecast for the 2015 aggregate cereal production stands at 182 900 tonnes, 5 percent above last year's average-level. Most of this increase reflects a larger rice output, which is expected to reach 77 000 tonnes, 7 percent up from the previous year's reduced level. Similarly, the 2015 maize output is projected to increase by 4 percent to 81 000 tonnes.

Cereal imports in 2015/16 marketing year (July/June) forecast to decline

As a result of the expected increase in the 2015 aggregate cereal production, total cereal imports in the 2015/16 marketing year (July/June) are forecast to contract by 8 percent to 79 000 tonnes. Imports consist mainly of rice and wheat, which are forecast at 77 000 and 6 000 tonnes, respectively.

Food insecurity persists in rural areas

Stressed food insecurity persists mostly in rural areas, with higher concentrations in the eastern and southern parts of the country. UNHCR indicates that as of June 2015 more than 21 000 refugees from Bhutan are still living in refugee camps in eastern Nepal.

Bhutan

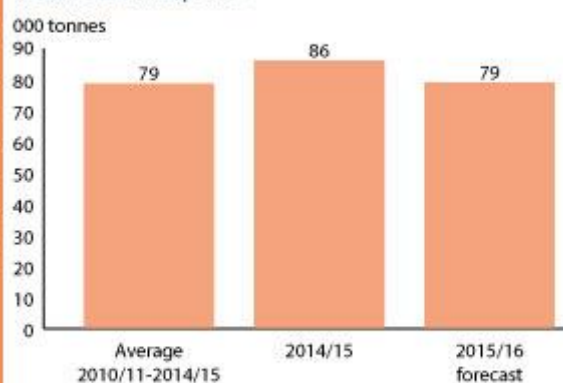
Cereal production

	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes			percent
Rice (paddy)	76	72	77	7
Maize	75	78	81	4
Millet	6	7	7	0
Others	16	18	18	0
Total	174	175	183	5

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

Bhutan

Total cereal 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: 31-October-2014

FOOD SECURITY SNAPSHOT

- Cereal production in 2014 forecast slightly above last year's level
- Cereal imports in 2014/15 (July/June) marketing year forecast to remain firm
- Food insecurity persists in rural areas

Cereal production in 2014 forecast slightly above last year's level

Harvesting of the 2014 monsoon season crops, millet, rice and maize, is currently underway and will continue until December. FAO forecasts the 2014 rice and maize outputs at 80 000 and 83 000 tonnes, respectively, slightly above last year's good level. The increase is the result of a small expansion in the area planted and good yields following generally favourable weather conditions during the cropping season.

Similarly, the 2014 outputs of the minor winter season crops, wheat and barley, harvested earlier in the year, are estimated slightly higher than in 2013 mainly due to improved yields following favourable weather conditions during the growing season.

Cereal imports in 2014/15 (July/June) marketing year forecast to remain firm

Despite the anticipated slight increase in 2014 cereal production, total cereal imports in the 2014/15 (July/June) marketing year are anticipated at 77 800 tonnes, around the previous year's above-average level, mainly due to increasing demand from growing population. Imports consist mainly of rice and wheat, which are forecast at 70 000 and 6 000 tonnes, respectively.

Food insecurity persists in rural areas

Food insecurity persists predominantly in rural areas with higher concentrations in the eastern and southern parts of the country. UNHCR indicates that, as of January 2014, some 32 000 Bhutanese citizens of Nepalese origin are still living in refugee camps in eastern Nepal. Nearly 85 000 refugees have been resettled in third countries, following the major resettlement programme launched in November 2007. UNHCR is expected to facilitate the resettlement of some 7 000 people in 2014. According to the latest estimates from the UN Inter-agency Group for Child Mortality Estimation, the under-five mortality rate decreased from 134 per 1 000 in 1990 to 36 per 1 000 in 2013.

Bhutan

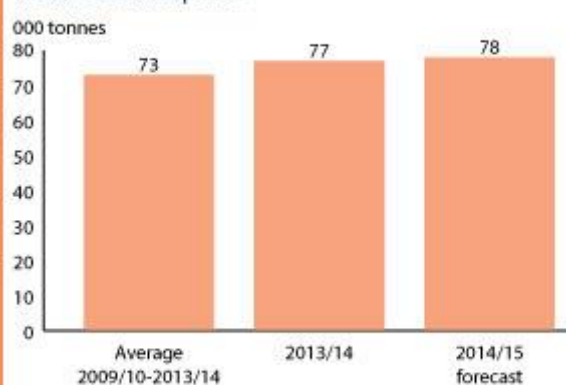
Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes			percent
Rice (paddy)	75	78	80	3
Maize	72	81	83	2
Millet	6	7	7	0
Others	15	17	18	6
Total	167	183	188	3

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

Bhutan

Total cereal 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: 07-August-2014

FOOD SECURITY SNAPSHOT

- Prospects for the 2014 cereal crops are favourable
- Below-average cereal imports forecast in the 2014/15 (July/June) marketing year
- Food insecurity persists in certain districts

Prospects for the 2014 cereal crops are favourable

Harvesting of the 2014 minor winter season crops, mainly wheat and barley, was completed in by the end of July. This year's wheat and barley production is estimated slightly higher than in 2013 mainly due to higher yields following favourable weather conditions during the growing season.

Early prospects for the monsoon season crops, paddy and maize, are considered good. FAO preliminarily forecasts the 2014 rice and maize outputs at 90 000 and 82 000 tonnes, respectively, slightly above last year's good harvests, mainly due to an estimated expansion in area planted of both crops.

Below-average cereal imports forecast in the 2014/15 (July/June) marketing year

Following higher production levels for the second consecutive year in 2013, cereal imports in the 2014/15 (July/June) marketing year are anticipated at 65 800 tonnes, similar to the previous year's average level. Imports consist mainly of rice and wheat, forecast in the current marketing year at 58 000 and 6 000 tonnes, respectively.

Food insecurity persists in certain districts

Food insecurity persists predominantly in rural areas with higher concentrations in the eastern and southern parts of the country. According to the latest UNICEF report, the under-five mortality rate decreased from 131 per 1 000 in 1990 to 45 in 2012. UNHCR information indicates that, as of January 2014, some 32 000 Bhutanese citizens of Nepalese origin are still living in two refugee camps in eastern Nepal. Nearly 85 000 refugees have been resettled in third countries, following the major resettlement programme launched in November 2007. UNHCR is expected to facilitate the resettlement of some 7 000 people in 2014.

Bhutan

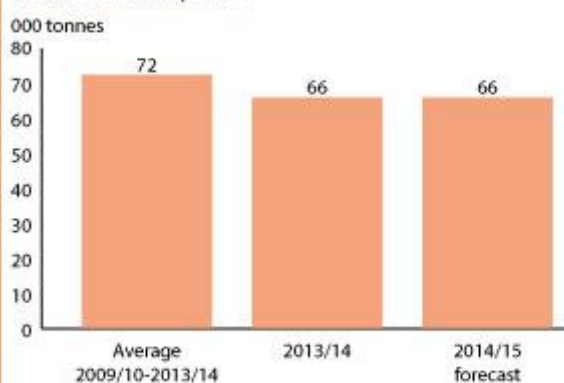
Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes			percent
Rice (paddy)	78	88	90	2
Maize	72	81	82	1
Millet	6	7	7	0
Others	15	17	18	6
Total	170	193	197	2

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

Bhutan

Total cereal 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: 30-May-2014

FOOD SECURITY SNAPSHOT

- Prospects for the 2014 cereal crops are favourable
- Below average cereal imports in the 2013/14 marketing year (July/June)
- Food insecurity persists in certain districts

Prospects for the 2014 cereal crops are favourable

Harvesting of the 2014 minor winter season crops, mainly wheat and barley, is currently underway and will continue until the end of July. This year's wheat and barley production is forecast slightly higher than in 2013, mainly due to favourable weather during the growing season.

Plantings of the 2014 maize crop was completed in March, while that of rice and millet started in early May and will continue into August. FAO preliminarily forecasts the 2014 maize and rice outputs at 82 000 and 90 000 tonnes, respectively, slightly above last year's good harvests, mainly due to an estimated expansion in area planted of both crops.

Below average cereal imports in the 2013/14 marketing year (July/June)

Following higher production levels in 2013, the cereal imports in the nearly-completed 2013/14 marketing year (July/June) are anticipated at 66 100 tonnes, 9 percent below the previous year's average level. Imports consist mainly of rice and wheat, forecast in the current marketing year at 58 000 and 6 000 tonnes, respectively.

Food insecurity persists in certain districts

Food insecurity persists in certain districts, particularly in the eastern and southern parts of the country. According to the latest UNICEF report, the under-five mortality rate decreased from 131 per 1 000 in 1990 to 45 in 2012. UNHCR information indicates that, as of mid-2013, some 34 000 Bhutanese citizens of Nepalese origin are still living in two refugee camps in eastern Nepal. More than 83 000 refugees have been resettled in third countries, following the major resettlement programme launched in November 2007.

Bhutan

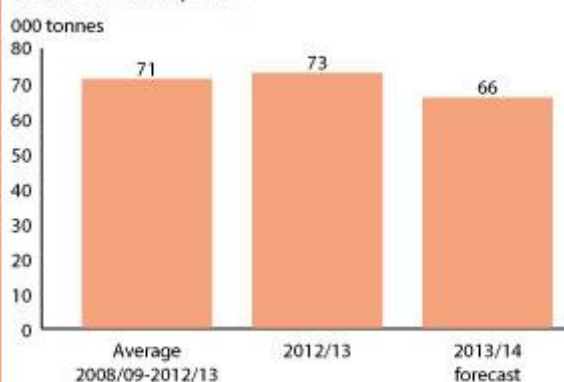
Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes			percent
Rice (paddy)	78	88	90	2
Maize	72	81	82	1
Millet	6	7	6	-14
Others	15	17	17	0
Total	170	193	195	1

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

Bhutan

Total cereal 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: 28-January-2014

FOOD SECURITY SNAPSHOT

- Record cereal harvest estimated for 2013
- Food inflation remains high
- Food insecurity persists in certain districts

Record cereal harvest is estimated for 2013

Harvesting of the 2013 main season crops, mainly rice and maize, was completed by December. The 2013 paddy production is expected to reach a record level at 88 000 tonnes, some 4 percent above last year's bumper level. The increase is mainly attributed to a slight expansion in plantings and higher yields, following favourable weather conditions.

Similarly, the 2013 maize crop is estimated at 81 400 tonnes, slightly above previous year's bumper output. The slight increase is mainly the result of favourable weather conditions during the growing season.

The aggregate 2013 cereal production is thus estimated at 192 900 tonnes, including rice in paddy terms, up 3 percent on last year's bumper output. Rice is the main staple food in the country, with per capita consumption estimated at about 175 kg/year.

Following higher production levels in 2013, the cereal import requirement for the 2013/14 marketing year (July/June) is forecast at 66 100 tonnes, about 9 percent below the previous year. Imports consist mainly of rice and wheat, forecast in the current marketing year at 58 000 and 6 000 tonnes, respectively.

Food inflation remains high

According to the Bhutan National Statistics Bureau (NSB) the annual consumer price index was recorded at 9.1 percent in the third quarter of 2013. The food price inflation has been measured at 9.4 percent as opposed to the non-food price inflation of 8.9 percent.

Food insecurity persists in certain districts

Food insecurity persists in certain districts, particularly in the eastern and southern regions of Bhutan. According to the latest UNICEF report, the under-five mortality rate decreased from 131 per 1 000 in 1990 to 45 in 2012.

Recent UNHCR information indicates that, as of mid-2013, some 34 000 Bhutanese citizens of Nepali origin are still living in two refugee camps in eastern Nepal. More than 83 000 refugees have been resettled in third countries, following the major resettlement programme launched in November 2007.

Bhutan

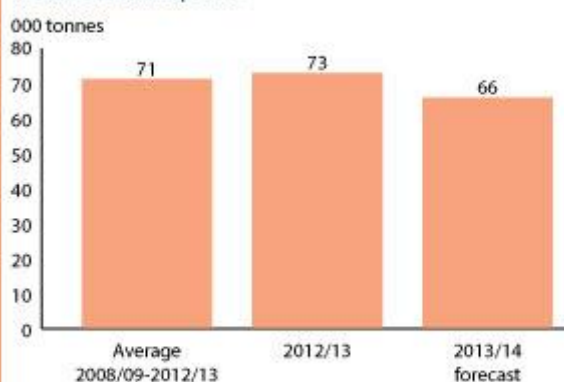
Cereal production

	2008-2012 average	2012	2013 estimate	change 2013/2012
	000 tonnes		percent	
Rice (paddy)	76	85	88	4
Maize	70	80	81	1
Wheat	5	6	7	17
Others	14	17	17	0
Total	165	188	193	3

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

Bhutan

Total cereal 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: 12-July-2013

FOOD SECURITY SNAPSHOT

- Favourable prospects for the 2013 winter wheat harvest
- Above average aggregate cereal crop gathered in 2012
- Food inflation remains high
- Food insecurity persists in certain districts

Favourable prospects for the 2013 winter wheat harvest

Harvesting of the 2013 winter season crops, mainly wheat and barley, is currently underway and will continue until the end of July. Based on satellite imagery, relatively normal winter rainfall/snow patterns were recorded between November and February in most of the country. During the first dekad of March to the second dekad of May, the rainfall remained mostly above-average in eastern parts of the country, while lingered at below average levels in the north-west, affecting potential yields. The 2013 wheat production is estimated to be slightly higher than last year's level, mainly due to an estimated increase in plantings and favourable weather during growing season.

Planting of the 2013 maize was completed in March, while that of rice and millet commenced in May and will continue into August.

Rainfall has been generally good from late May to early June, benefiting planting operations.

The cereal import requirement for the 2013/14 marketing year (July/June) are forecast at 69 900 tonnes, some 7.4 percent below last year's estimated level. Imports consist mainly of rice and wheat, forecast in the current marketing year at 63 000 and 6 900 tonnes, respectively.

Above average aggregate cereal crop gathered in 2012

The aggregate 2012 cereal production is estimated by FAO at 174 400 tonnes, including rice in paddy terms, some 3 percent above the 2011 output.

Rice is the main staple food in the country, with per capita consumption currently estimated at about 175 kg/year.

Food inflation remains relatively high

According to the Bhutan National Statistics Bureau (NSB) the year-on-year inflation rate stood at 8.37 percent in the first quarter of 2013 compared to the same period a year earlier. During the same period, the food price inflation was estimated at 7.86 percent as opposed to the non-food price inflation of 8.66 percent. The increase is mainly attributed to high food prices as well as weakening of Ngultrum (which is pegged to the Indian Rupee) against US Dollar.

Bhutan

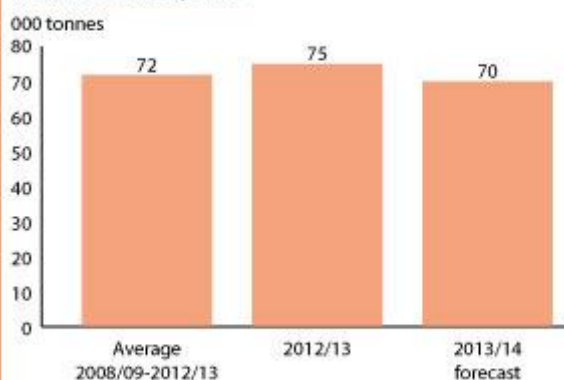
Cereal production

	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes			percent
Rice (paddy)	76	85	88	4
Maize	65	69	71	3
Cereals nes	5	6	5	-17
Others	13	14	14	0
Total	159	174	178	-2

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

Bhutan

Total cereal 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 insecurity persists in certain districts

Food insecurity persists in certain districts, mainly due to reduced localised cereal production and high food prices. According to the 2012 Bhutan Poverty Analysis report, poverty and food insecurity prevail predominantly in Dagana (south-west), Lhuntse (north-east), Pema Gatshel (east) and Zhemgang (south) districts.

Recent UNHCR information indicates that, as of April 2013, more than 38 000 Bhutanese of Nepali origin are still living in two refugee camps in southeastern Nepal. Nearly 80 000 refugees have been resettled in third countries, following the major resettlement programme launched in November 2007.

Reference Date: 8-February-2013

FOOD SECURITY SNAPSHOT

- Above average aggregate cereal crop gathered in 2012
- Food inflation remains high
- Food insecurity persists in certain districts

Above average aggregate cereal crop gathered in 2012

Harvesting of the 2012 main season crops, mainly rice and maize, was completed by December. The 2012 maize crop is estimated at 69 400 tonnes, slightly below previous year's above-average output. The stagnation is mainly the result of prolonged dry weather conditions from mid March to early June, which negatively impacted early development of the crop. The 2012 paddy production is expected to be similar to the previous year's harvest at around 75 000 tonnes. The aggregate 2012 cereal production is thus estimated at 164 400 tonnes, including rice in paddy terms, similar to the year before. Rice is the main staple food in the country, with per capita consumption currently estimated at about 175 kg/year.

In response to rising population and lower production levels in 2012, the cereal import requirement for the 2012/13 marketing year (July/June) are forecast at 75 000 tonnes, about 15 percent higher than the previous year. Imports consist mainly of rice and wheat, forecast in the current marketing year at 63 000 and 6 900 tonnes, respectively.

Food inflation remains high

According to the Bhutan National Statistics Bureau (NSB) the annual consumer price index increased by 11.2 percent in the 3rd quarter of 2012 over the same period a year earlier. The increase is mainly attributed to high food prices as well as weakening of Ngultrum (which is pegged to the Indian Rupee) against US Dollar. The food price inflation has been measured at 13.9 percent as opposed to the non-food price inflation of 9.7 percent.

Food insecurity persists in certain districts

Food insecurity persists in certain districts, mainly due to reduced cereal production and high food prices. The eastern and southern regions of Bhutan are the most vulnerable to food insecurity. According to the latest UNICEF report, the under-5 mortality rate decreased from 138 per 1 000 in 1990 to 54 in 2011.

Recent UNHCR information indicates that, as of December 2012, more than 41 000 Bhutanese citizens of Nepali origin are still living in two refugee camps in south-eastern Nepal. More than 75 000 refugees have been resettled in third countries, following the major resettlement programme launched in November 2007.

Bhutan

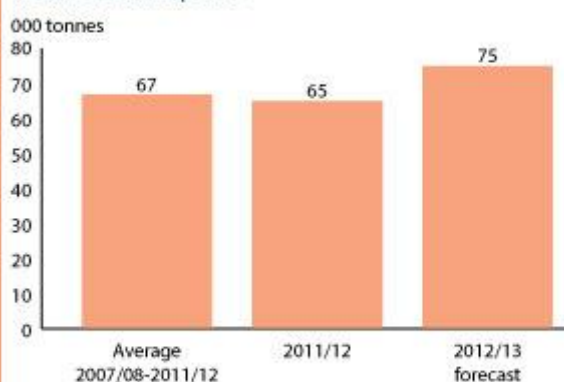
Cereal production

	2007-2011 average	2011	2012 estimate	change 2012/2011
	000 tonnes			percent
Rice (paddy)	73	75	75	0
Maize	69	70	69	-1
Others	21	20	20	0
Total	162	165	164	-1

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

Bhutan

Total cereal 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: 14-September-2012

FOOD SECURITY SNAPSHOT

- Slight decrease in 2012 cereal production expected
- Rice prices have been rising in the last several months
- Food insecurity persists in certain districts

Slight decrease in 2012 cereal production expected

Harvesting of the 2012 winter season crops, mainly wheat, barley and buckwheat, was completed in May, while that of millet, rice and maize will commence in September and continue into December.

Rains have been generally good across the country since the start of the season (October-March). However, judging from satellite imagery, below-average rains were received during the second dekad of April to second dekad of June. Rainfall improved between July and mid-August over many areas of the country, alleviating the situation somewhat, but they returned to below-normal level since then.

As a result, maize yields are likely to be negatively affected by the prolonged dry weather.

The 2012 wheat production is estimated to be slightly higher than last season, mainly due to favourable weather during the growing period.

The aggregate 2012 cereal harvest is preliminarily estimated at 171 000 tonnes, including rice in paddy terms, a decrease of 3 percent over the production of 2011.

Imports consist mainly of rice and maize, which are acquired on commercial basis from neighbouring countries, mainly India. The total cereal import requirements in the 2012/13 marketing year (July/June) are estimated to increase slightly in response to lower cereal production prospects in 2012.

Rice prices have been rising in the last several months

According to the Bhutan National Statistics Bureau (NSB) the annual consumer price index was 13.5 percent in the 2nd quarter of 2012 over the same period a year earlier. This is the highest annual inflation recorded since 2003. The increase is mainly attributed to increase in food prices as well as weakening of Ngultrum (which is pegged to the Indian Rupee) against US Dollar. The food price inflation has been measured at 18.7 percent as opposed to the non-food price inflation of 10.6 percent.

Price of rice has been increasing since June, after it remained unchanged since January 2012.

Bhutan

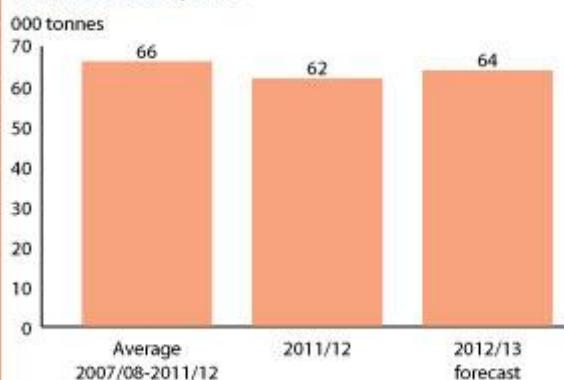
Cereal production

	2007-2011 average	2011	2012 forecast	change 2012/2011
	000 tonnes		percent	
Rice (paddy)	74	79	79	0
Maize	69	70	65	-7
Wheat	6	8	9	12
Others	16	19	18	-5
Total	165	176	171	-3

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

Bhutan

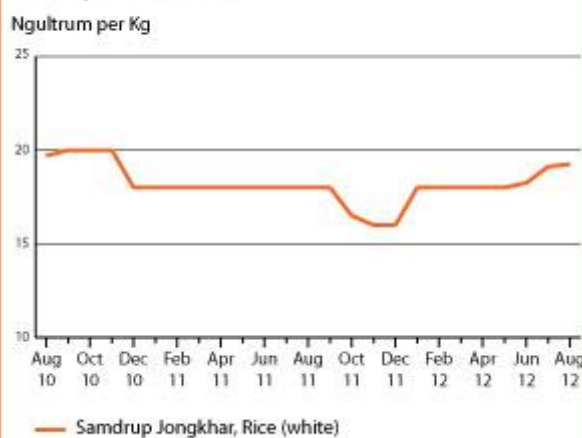
Total cereal imports



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

Bhutan

Retail prices of rice



Source: Agriculture Marketing Services, MoA

Food insecurity persists in certain districts

Food insecurity persists in certain districts of Bhutan, mainly due to reduced cereal production and rising food prices. The eastern and southern regions of Bhutan are the most vulnerable to food insecurity. According to the 2007 Bhutan Living Standard Survey Report, poverty and food insecurity prevail predominantly in Lhuntse, Samtse, Zhemgang and Monggar districts.

According to the latest UNICEF report, the under-5 mortality rate decreased from 138 per 1000 in 1990 to 54 in 2011.

Recent UNHCR information indicates that there are more than 77 000 Bhutanese citizens of Nepali origin still living in seven refugee camps in south-eastern Nepal.

Reference Date: 27-June-2012

FOOD SECURITY SNAPSHOT

- Generally good rains benefited the 2012 winter cereal crops
- The 2011 aggregate cereal production is estimated to be above average
- Relatively high inflation despite stable wheat and rice prices
- Food insecurity persists in certain districts

2012 winter cereal crops benefit from good rains

Harvesting of the 2012 winter season crops, mainly wheat, barley and buckwheat, is currently underway and will continue until the end of July. Planting of the 2012 maize was completed in March, while that of rice and millet commenced in May and will continue into August. Rains have been generally good across the country since the start of the season. However, judging from satellite imagery, below-average rains were received during the third dekad of April to second dekad of June. As a result, maize yields are likely to be negatively affected by the prolonged dry weather.

The 2012 wheat production is estimated to be slightly higher than last season, mainly due to favourable weather during the growing period.

The 2011 total cereal harvest is estimated to be above average

Cereal harvest for 2011 is estimated at 176 000 tonnes, including rice in paddy terms, an increase of 16 percent over the below-average 2010 harvest. Rice is the main staple food in the country. The average per capita rice consumption is estimated at 172 kg/year in 2011.

Imports consist mainly of rice and maize, which are acquired on commercial basis from neighbouring countries. The total cereal import requirements in the 2012/13 marketing year (July/June) are forecast to increase slightly by about 3 percent from last year's level in response to lower maize production prospects in 2012.

Relatively high food price inflation despite stable wheat and rice prices

According to the Bhutan National Statistics Bureau (NSB) the annual consumer price index rose by 9.5 percent in the 1st quarter of 2012 over the same period a year earlier, about one percentage point larger than the rate of increase in 4th quarter 2011. The food price inflation has been measured at 11.4 percent as opposed to the non-food price inflation of 8.4 percent.

Price of rice remained unchanged between January and April 2012. Also April 2012 rice price in Samdrup Jongkhhar came back up after a brief dip to the same level as the April 2011. Similarly, price of wheat remained stable since May 2011 at higher level

Bhutan

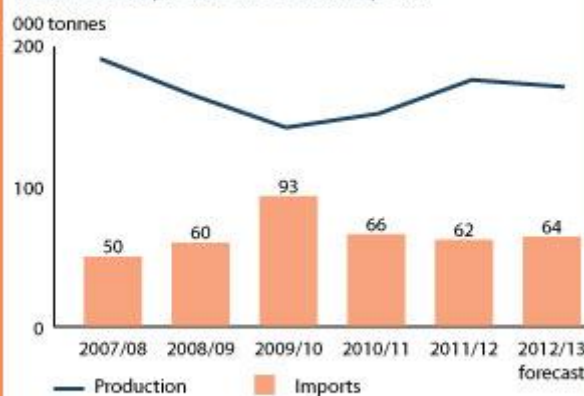
Cereal production

	2007-2011 average	2011	2012 forecast	change 2012/2011
	000 tonnes		percent	
Rice (paddy)	74	79	79	0
Maize	69	70	65	-7
Wheat	6	8	9	4
Others	16	19	18	-5
Total	165	176	171	-3

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

Bhutan

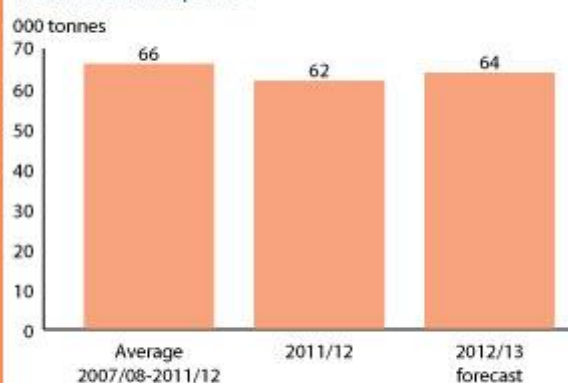
Total cereal production and imports



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

Bhutan

Total cereal imports



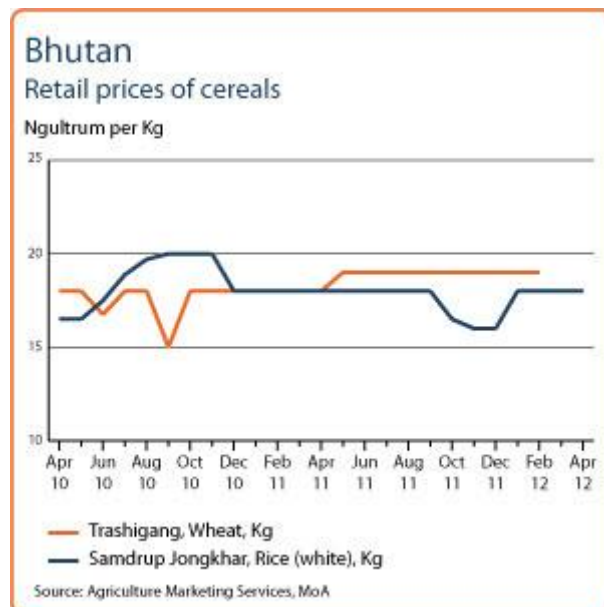
Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

than a year ago.

Food insecurity persists in certain districts

Food insecurity persists in certain districts of Bhutan, mainly due to reduced cereal production and rising food prices. The eastern and southern regions of Bhutan are the most vulnerable to food insecurity. According to the 2007 Bhutan Living Standard Survey Report, poverty and food insecurity prevail predominantly in Lhuntse, Samtse, Zhemgang and Monggar districts.

Recent UNHCR information indicates that there are more than 77 000 Bhutanese citizens of Nepali origin still living in seven refugee camps in south-eastern Nepal.



Reference Date: 13-February-2012

FOOD SECURITY SNAPSHOT

- Bumper cereal harvest is estimated for 2011
- Prices of rice and wheat remain stable
- Food insecurity persists in certain districts

Bumper cereal harvest is estimated for 2011

Harvesting of the main season crops, mainly rice and maize, was completed by the end of 2011. Cereal harvest for 2011 is estimated to increase to 184 000 tonnes, including rice in paddy terms, by 6.4 percent over the above-average 2010 harvest. Rice is the main staple food in the country. The average per capita rice consumption is estimated at 172 kg/year in 2011.

Despite an anticipated improved cereal production, the rising population and increase in per capita cereal consumption since early 2000 are expected to result in a slight increase in cereal imports during 2010/11 marketing year (July/June), consisting mainly of rice and wheat and acquired on commercial basis from neighbouring India.

Prices of rice and wheat remain stable

Price of rice had remained unchanged in the past two months after declining September and October. In December 2011 it was lower by 11 percent from the same month last year.

Price of wheat on the other hand remained stable since May 2011 at higher level than a year ago.

The price of local and imported crops is considerably in comparison with the neighbouring countries, mainly due to factors such as: small scale production, low productivity from minimal use of chemicals/fertilizers, poor road network and rising fuel cost.

Food insecurity persists in certain districts

Food insecurity persists in certain districts of Bhutan, mainly due to reduced cereal production and rising food prices. The eastern and southern regions of Bhutan are the most vulnerable to food insecurity. According to the 2007 Bhutan Living Standard Survey Report, poverty and food insecurity prevail predominantly in Lhuntse, Samtse, Zhemgang and Monggar districts.

Recent UNHCR information indicates that there are more than 77 000 Bhutanese citizens of Nepali origin still living in seven refugee camps in south-eastern Nepal. As an importer of more than 50 percent of its food requirements, the food security is likely to worsen if the international prices of rice and wheat rise.

Bhutan

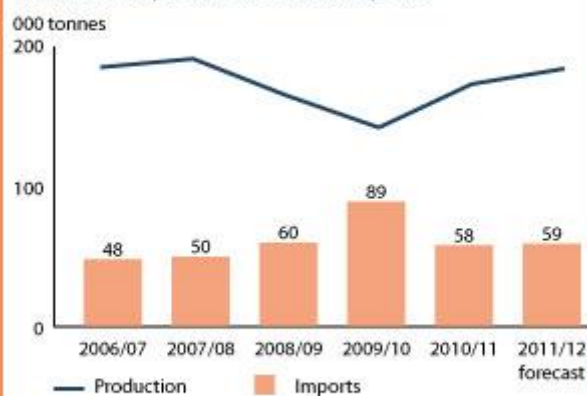
Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes		percent	
Maize	74	75	77	3
Rice (paddy)	73	75	79	5
Wheat	7	5	9	80
Others	18	18	19	6
Total	171	173	184	6

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

Bhutan

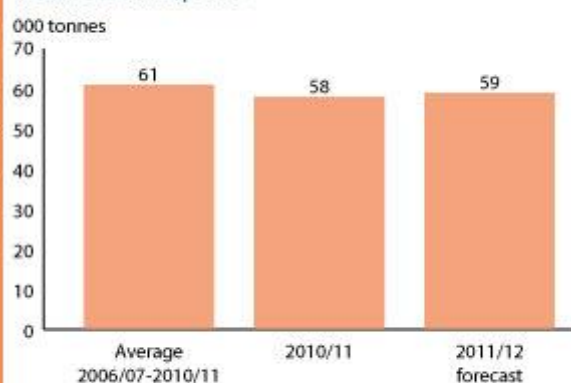
Total cereal production and imports



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

Bhutan

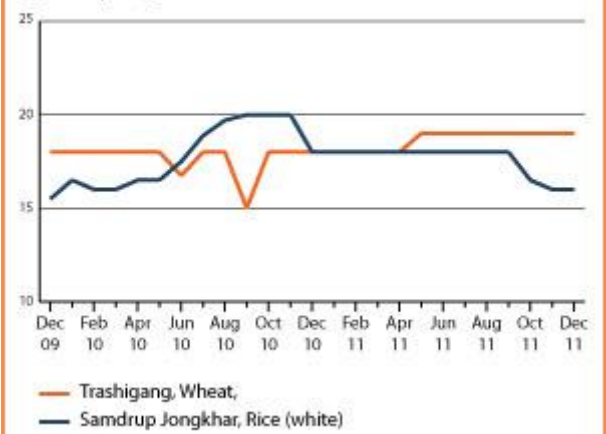
Total cereal imports



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

Bhutan Retail prices of cereals

Ngultrum per Kg



Source: Agriculture Marketing Services, MoA

Reference Date: 14-December-2011

FOOD SECURITY SNAPSHOT

- Bumper cereal harvest is estimated for 2011
- Rice prices decreased slightly in October while wheat prices remain stable
- Food insecurity persists in certain districts

Bumper cereal harvest is estimated for 2011

Harvesting of the main season crops, mainly rice and maize, is completed. Cereal harvest for 2011 is preliminarily estimated to increase to 184 000 tonnes, including rice in paddy terms, by 6.4 percent over the above-average 2010 harvest. Rice is the main staple food in the country. The average per capita rice consumption is estimated at 172 kg/year in 2011.

Despite an anticipated improved cereal production, the rising population and increase in per capita cereal consumption since early 2000 are expected to result a slight increase in cereal imports during 2010/11 marketing year (July/June), consisting mainly of rice and wheat and acquired on commercial basis from neighbouring India.

Rice prices decreased slightly in October while wheat prices remain stable

Price of rice in October decreased by 8 percent from its level in September and by 18 percent from the same month last year. The price has been generally stable between December 2010 and September 2011 period.

Price of wheat on the other hand remained stable since May 2011 at higher levels than a year ago.

The price of local and imported crops is considerably in comparison with the neighbouring countries, mainly due to factors such as: small scale production, low productivity from minimal use of chemicals/fertilizers, poor road network and rising fuel cost.

Food insecurity persists in certain districts

Food insecurity persists in certain districts of Bhutan, mainly due to reduced cereal production and rising food prices. The eastern and southern regions of Bhutan are the most vulnerable to food insecurity. According to the 2007 Bhutan Living Standard Survey Report, poverty and food insecurity prevail predominantly in Lhuntse, Samtse, Zhemgang and Monggar districts.

Recent UNHCR information indicates that there are more than 77 000 Bhutanese citizens of Nepali origin still living in seven refugee camps in south-eastern Nepal. As an importer of more than 50 percent of its food requirements, the food security is likely to worsen if the international prices of rice and wheat rise.

Bhutan

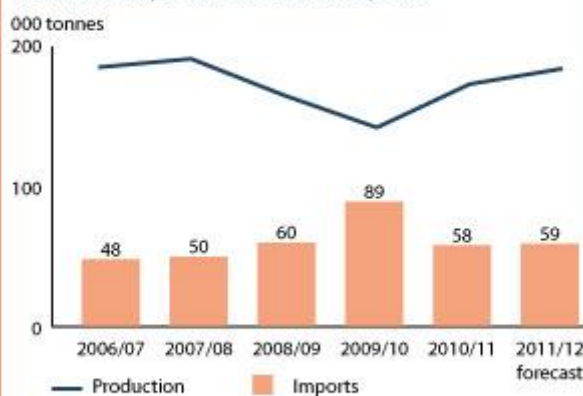
Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes		percent	
Maize	74	75	77	3
Rice (paddy)	73	75	79	5
Wheat	7	5	9	80
Others	18	18	19	6
Total	171	173	184	6

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

Bhutan

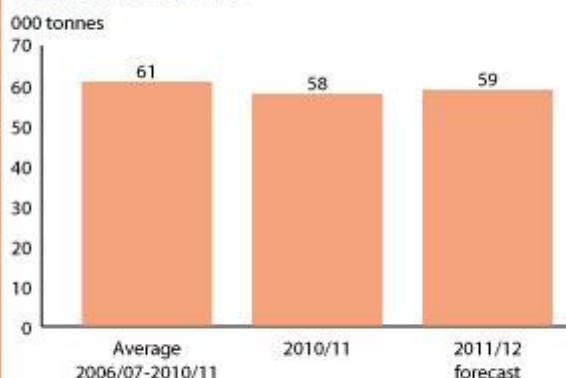
Total cereal production and imports



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

Bhutan

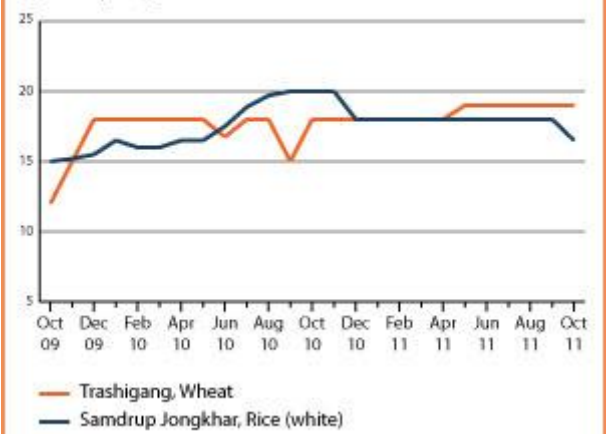
Total cereal imports



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

Bhutan Retail prices of cereals

Ngultrum per Kg



Source: Agriculture Marketing Services, MoA

Reference Date: 30-May-2011

FOOD SECURITY SNAPSHOT

- Outlook for 2011 winter wheat is favourable
- Cereal production in 2010 recovered from poor harvest in 2009
- Pockets of food insecurity persist

Favourable prospects for the 2011 winter wheat harvest

Very little wheat is produced in this mountainous country but nonetheless the area planted has increased in past few years. Harvesting of the crop will begin shortly and will continue until the end of July. The snow/rainfall has been near normal this season and the early forecast points to an improved production.

The 2010 total cereal production is estimated at 185 000 tonnes (including paddy), a recovery from the drought affected 2009 output. The generally favourable monsoon season last year was the main reason behind the eight percent increase in production in 2010.

Better cereal production in 2010 is expected to lower the import requirements for the 2010/11 marketing year (July/June). However, the rising per capita cereal consumption has resulted in a rising trend in cereal imports. Imports consist mainly of rice and wheat and are normally acquired on commercial basis from neighbouring India.

Food prices remained stable but at high levels

Prices of cereals, particularly of rice and wheat, the main staple foods, have remained stable in recent months. Price of rice which had soared in the second half of 2010, due to increased demand, stabilized in early 2011 and in April were 9 percent up from their levels of a year earlier. Price of wheat on the other hand has remained generally stable.

Food insecurity exists in certain districts

According to the 2007 Bhutan Living Standard Survey Report, poverty and food insecurity prevail predominantly in Lhuntse, Samtse, Zhemgang and Monggar districts. Recent UNHCR information indicates that there are nearly 95 000 Bhutanese citizens of Nepali origin still living in seven refugee camps in south-eastern Nepal. Resettlement of refugees especially in the western countries is being implemented to solve this long standing problem.

Bhutan

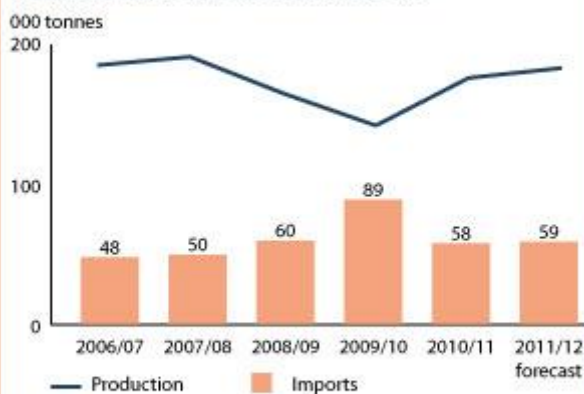
Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes		percent	
Maize	74	75	77	3
Rice (paddy)	73	75	79	5
Wheat	7	8	9	12
Others	14	13	13	0
Total	172	176	183	4

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

Bhutan

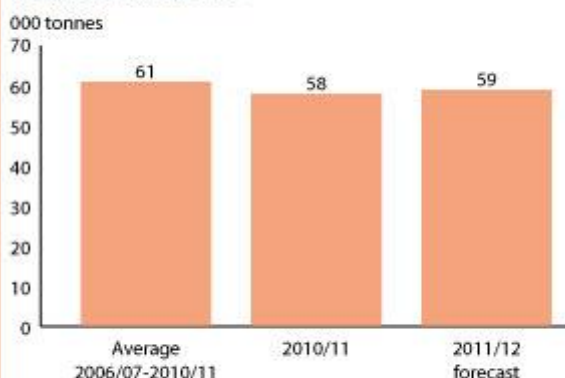
Total cereal production and imports



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

Bhutan

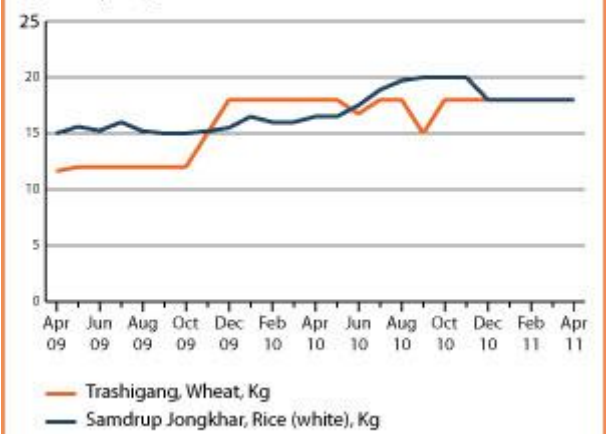
Total cereal imports



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

Bhutan Retail prices of cereals

Ngultrum per Kg



Source: Agriculture Marketing Services, MoA

Reference Date: 7-April-2011

FOOD SECURITY SNAPSHOT

- Outlook for 2011 winter wheat is favourable.
- Cereal production in 2010 recovered from poor harvest in 2009.
- Pockets of food insecurity persist.

Favourable prospects for the 2011 winter wheat harvest

Very little wheat is produced in this mountainous country but nonetheless the area planted has increased in past few years. Harvesting of the crop will begin shortly and will continue until the end of July. The snow/rainfall has been near normal this season and the early forecast points to an improved production.

The 2010 total cereal production is estimated at 185 000 tonnes (including paddy), a recovery from the drought affected 2009 output. The generally favourable monsoon season last year was the main reason behind the eight percent increase in production in 2010.

Better cereal production in 2010 is expected to lower the import requirements for the 2010/11 marketing year (July/June). However, the rising per capita cereal consumption has resulted in a rising trend in cereal imports. Imports consist mainly of rice and wheat and are normally acquired on commercial basis from neighbouring India.

Food prices have stabilized at high level

Prices of cereals, particularly of rice and wheat, the main staple foods, have been rising significantly in recent months. Price of rice in particular had soared recently reportedly due to increased demand following the rise in the salaries of the civil servants. The price of rice seems to have settled down in January and February. Price of wheat on the other hand has remained generally stable.

Food insecurity exists in certain districts

According to the 2007 Bhutan Living Standard Survey Report, poverty and food insecurity prevail predominantly in Lhuntse, Samtse, Zhemgang and Monggar districts. Recent UNHCR information indicates that there are nearly 95 000 Bhutanese citizens of Nepali origin still living in seven refugee camps in south-eastern Nepal. Resettlement of refugees especially in the western countries is being implemented to solve this long standing problem.

Bhutan

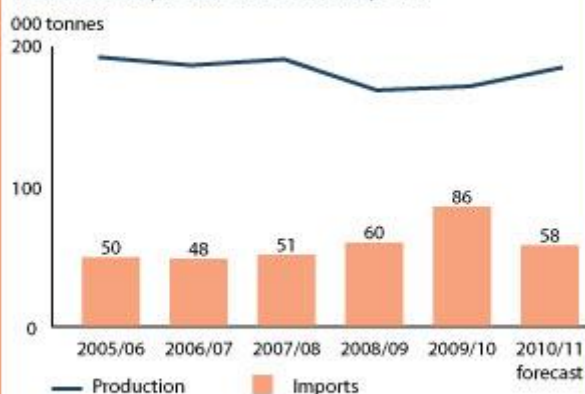
Cereal production

	2005-2009	2009	2010	change
	average		estimate	2010/2009
	000 tonnes			percent
Maize	80	72	75	4
Rice (paddy)	74	76	82	8
Wheat	9	8	10	25
Others	19	15	18	20
Total	182	171	185	8

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

Bhutan

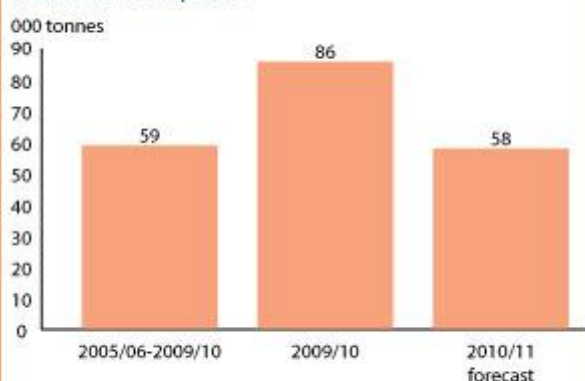
Total cereal production and imports



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

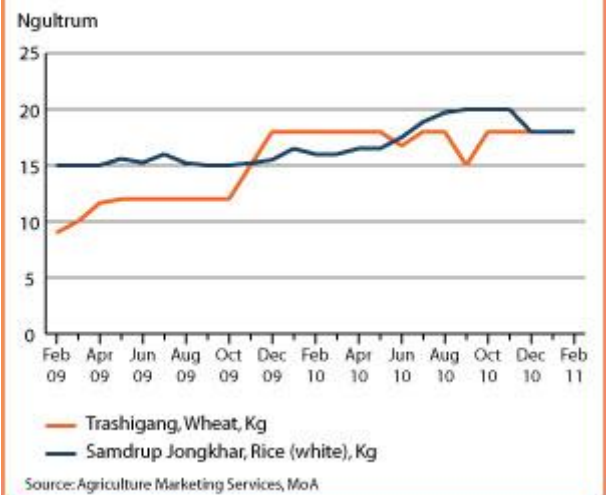
Bhutan

Total cereal imports



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

Bhutan Retail prices of cereals



Reference Date: 1-September-2010

FOOD SECURITY SNAPSHOT

- Outlook for 2010 cereal harvest is favourable.
- Food prices have risen steadily since early 2009.
- Pockets of food insecurity exist.

2010 cereal harvest is considered favourable

Early prospects for the monsoon season crops, mainly paddy and maize, are considered good. Winter crops such as wheat, barley and buckwheat, were harvested during April-May. Given that there was good residual moisture from last year's delayed monsoon and subsequent good rainfall during the season, production is estimated slightly improved over the depressed levels of previous year. Winter crop production, however, accounts only for about 12 percent on average of the total annual cereal output. The aggregate 2010 cereal harvest is forecast at 185 000 tonnes, about 8 percent over the below-average production of 2009.

The rising population and increase in per capita cereal consumption over last five years are expected to result in the gradual increase in cereal imports. Imports consist mainly of rice and wheat and are normally acquired on commercial basis from neighbouring India.

Food prices have been rising steadily since beginning of 2009

Prices of cereals, particularly of rice and wheat, the main staple foods, have been rising significantly in recent months. For example, April 2010 prices of white rice, maize and wheat in Samtse retail market were higher by 30, 15 and 14 percent than their corresponding levels 12 months earlier. Basic food prices have risen even in real terms since December 2008.

Food insecurity exists in certain districts

According to the 2007 Bhutan Living Standard Survey Report, poverty and food insecurity prevail predominantly in Lhuntse, Samtse, Zhemgang and Monggar districts. Recent UNHCR information indicates that there are nearly 95 000 Bhutanese citizens of Nepali origin still living in seven refugee camps in south-eastern Nepal. Resettlement of refugees especially in the western countries is being implemented to solve this long standing problem.

Bhutan

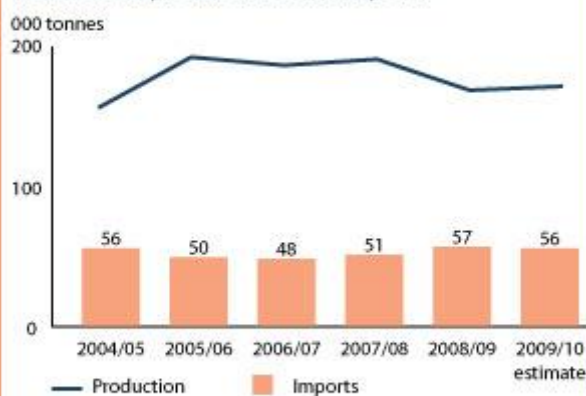
Cereal production

	2005-2009	2009	2010	change
	average		forecast	2010/2009
	000 tonnes			percent
Maize	80	72	75	4
Rice (paddy)	74	76	82	8
Wheat	9	8	10	25
Others	19	15	18	20
Total	182	171	185	8

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

Bhutan

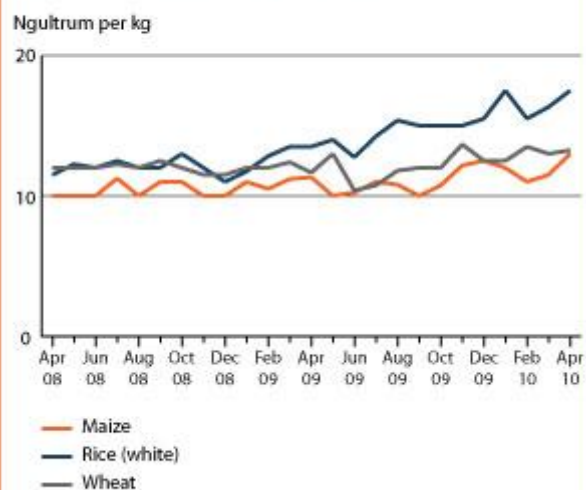
Total cereal production and imports



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

Bhutan

Selected cereal prices in Samtse



Source: Agriculture Marketing Services, MoA

Reference Date: 18-May-2010

FOOD SECURITY SNAPSHOT

- Outlook for 2010 winter crop harvest is favourable.
- Food prices have risen significantly in recent months
- Pockets of food insecurity exist

Outlook for 2010 winter crops is favourable

Winter crops such as wheat, barley and buckwheat, are currently being harvested. Given that there was good residual moisture from last year's delayed monsoon and subsequent good rainfall during the season, production is expected to recover from the depressed levels of previous years. Winter crop production, however, accounts only for about 12 percent on average of the total annual cereal output.

Total cereal harvest for 2009 including summer crops was below average

Agriculture is diversified in this mountainous country with major cereals cultivated being maize and rice. The harvest of the main season cereals gathered from September to December 2009 is estimated at 171 400 tonnes, including rice in paddy terms. This is about the same as the production in 2008 but some 4.5 percent below the 2004-2008 average annual cereal output. The rising population and increase in per capita cereal consumption over last five years are expected to result in the gradual increase in cereal imports. Imports consist mainly of rice and wheat and are normally acquired on commercial basis from neighbouring India.

Food prices have risen significantly in recent months

Prices of cereals, particularly of rice and wheat, the main staple foods, have been rising significantly in recent months. For example, April 2010 prices of white rice, maize and wheat in Samtse retail market were higher by 30, 15 and 14 percent than their corresponding levels 12 months earlier. Basic food prices have risen even in real terms since December 2008.

Food insecurity exists in certain districts

According to the 2007 Bhutan Living Standard Survey Report, poverty and food insecurity prevail predominantly in Lhuntse, Samtse, Zhemgang and Monggar districts. Recent UNHCR information indicates that there are nearly 95 000 Bhutanese citizens of Nepali origin still living in seven refugee camps in south-eastern Nepal. Resettlement of refugees especially in the western countries is being implemented to solve this long standing problem.

Bhutan

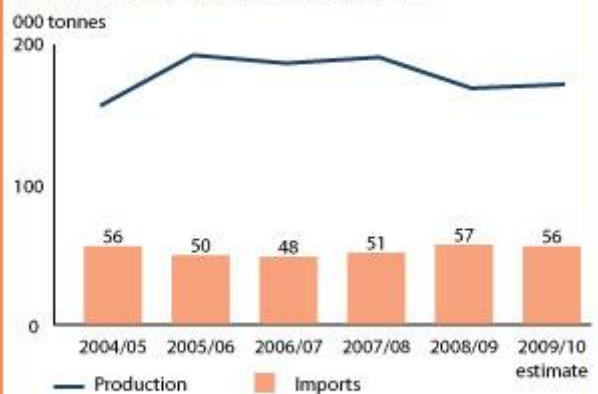
Cereal production

	2004-2008	2008	2009	change
	average		estimate	2009/2008
	000 tonnes			percent
Maize	84	69	72	4
Rice (paddy)	70	80	76	-5
Wheat	8	6	8	33
Others	17	14	15	7
Total	179	169	171	1

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

Bhutan

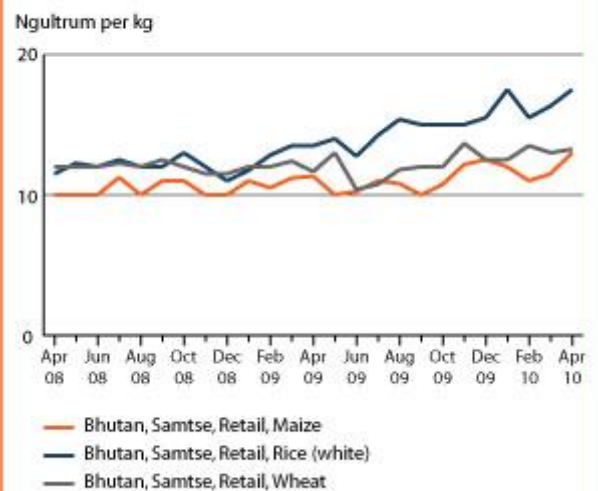
Total cereal production and imports



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

Bhutan

Selected retail cereal prices



Source: Agriculture Marketing Services, MoA

Reference Date: 02-March-2010

FOOD SECURITY SNAPSHOT

- Slightly higher than normal cereal harvest estimated for 2009
- Nominal food prices have risen significantly in recent months
- Pockets of food insecurity exist

Cereal harvest for 2009 is estimated to be about 10 percent higher than the previous year's below average output

Agriculture is diversified in this mountainous country with major cereals cultivated being maize and rice. The harvest of the main season cereals gathered from September to December 2009 is estimated at 179 000 tonnes, including rice in paddy terms, higher than the 2004-2008 average annual cereal output although about 7 percent below the record production in 2005/06. Good weather in general improved the harvest over the previous year. The rising population and increase in per capita cereal consumption since early 2000 coupled with the rise in production are expected to result in the average level of cereal imports during 2009/10 marketing year (July/June). Winter crops, mainly wheat and barley, constitute a small proportion of the total cereal output. Imports consist mainly of rice and wheat and are normally acquired on commercial basis.

Nominal food prices rising at the same rate as the general inflation

Prices of cereals, particularly of rice and wheat, the main staple foods, have been rising significantly in recent months. For example, February 2010 price of white rice in Gelephu retail market was 17 percent higher than the level 12 months earlier. During much of 2008 and 2009, however, the real food prices in Bhutan were fairly stable and in USD terms they had actually declined.

Food insecurity exists in certain districts

According to the 2007 Bhutan Living Standard Survey Report, poverty and food insecurity prevail predominantly in Lhuntse, Samtse, Zhemgang and Monggar districts. Recent UNHCR information indicates that there are nearly 95 000 Bhutanese citizens of Nepali origin still living in seven refugee camps in south-eastern Nepal. Resettlement of refugees especially in the western countries is being implemented to solve this long standing problem.

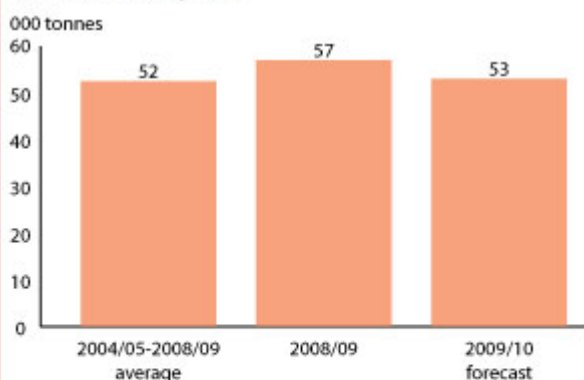
Bhutan

Cereal production

	2004-2008	2008	2009	change
	average		estimate	2009/2008
	000 tonnes			percent
Maize	77	67	72	7
Rice (paddy)	70	77	84	9
Wheat	8	6	8	33
Others	17	12	15	25
Total	171	162	179	10

Note: percentage change calculated from unrounded data.

Total cereal imports

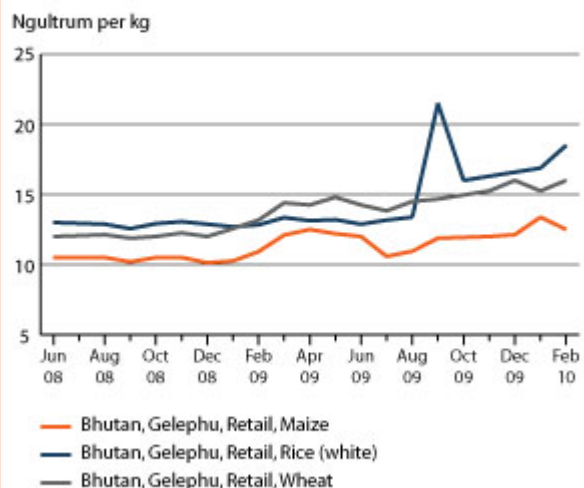


Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.

Source: FAO/GIEWS Country Cereal Balance Sheets

Bhutan

Selected retail cereal prices



Source: Agriculture Marketing Services, MoA

Reference Date: 23-October-2009

FOOD SECURITY SNAPSHOT

- Bumper cereal harvest estimated for 2009.
- Nominal food prices have risen more or less at the annual inflation rate.
- Pockets of food insecurity exist.

Bumper cereal harvest is estimated for 2009

Agriculture is diversified in this mountainous country with major cereals cultivated being maize and rice. The average annual cereal output from 2004-2008 amounted to some 127 000 tonnes. With the harvest of the paddy crop nearly completed FAO estimates 2009 total cereal output at 145 000 tonnes, a slight increase over the year before but about 14 percent increase over the average. Good weather was the principle factor responsible for this bumper harvest. This growth not with standing, the rising population and increase in per capita cereal consumption since early 2000, are expected to result in the usual level of cereal imports during 2009. Imports consist mainly of rice and wheat and are normally acquired on commercial basis.

Nominal food prices rising at the same rate as the general inflation

Prices of cereals, especially that of rice, in nominal terms have increased in 2009 compared to 2008, except for the sudden rise in the latest month (September 2009) prices. However, in real terms they have remained more-or-less constant. In USD terms they have actually declined. This USD price pattern, for example for rice, is similar to the one observed for rice prices in Delhi, India.

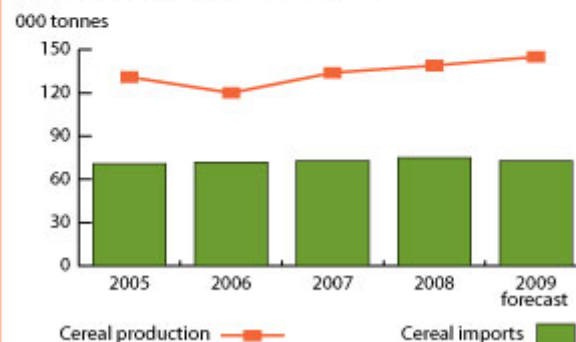
Food insecurity exists in certain districts

According to the 2007 Bhutan Living Standard Survey Report, poverty and food insecurity prevail predominantly in Lhuntse, Samtse, Zhemgang and Monggar districts. Recent UNHCR information indicates that there are nearly 95 000 Bhutanese citizens of Nepali origin still living in seven refugee camps in south-eastern Nepal. Resettlement of refugees especially in the western countries is being implemented to solve this long standing problem.

Cereal production and imports Bhutan

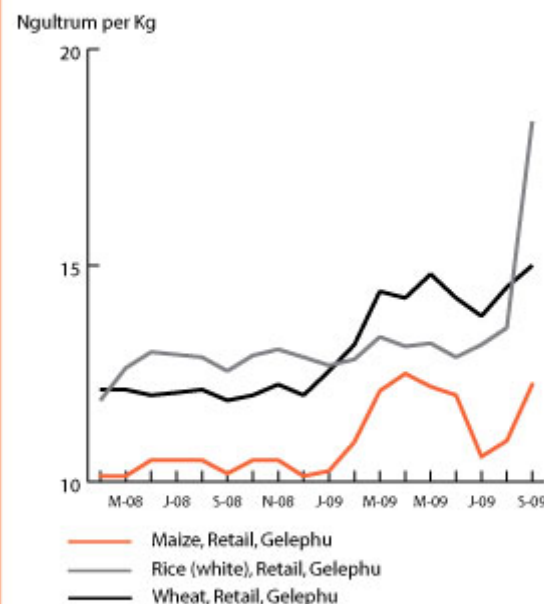
Cereal production	2004-2008 average	2008	2009 forecast	change* 2009/2008
	000 tonnes			percent
Maize	67	70	72	2.9%
Rice (milled)	42	48	50	5%
Wheat	7	8	8	6.7%
Other	8	13	15	11.5%
Total Cereals	127	139	145	4.6%

* Percentage change calculated from unrounded data.



Source: FAO/GIEWS Country Cereal Balance Sheets

Bhutan Selected food cereal prices



Source: Agriculture Marketing Services, MoA