



GIEWS Country Brief Madagascar

Reference Date: 28-July-2022

FOOD SECURITY SNAPSHOT

- Low cereal harvests in south, but at national level rice production forecast above-average in 2022
- National supplies of rice, country's key food staple, estimated satisfactory in 2022/23, but tight availabilities in droughtstricken southern regions
- Rice prices increased moderately, while food prices more broadly increased at faster pace
- Food insecurity foreseen to worsen in southern regions, amid low harvests, increased food prices and persisting high rates of poverty

Drought conditions kept cereal harvests in south at low levels in 2022

Drought conditions in the highly food-insecure southern regions, which have experienced five consecutive years of low food harvests (2016-2021), kept cereal production at average to below-average levels in 2022. With cereal crops already harvested by June, root and tuber crops will be harvested in August and production is also foreseen at reduced levels in southern and southwestern regions.

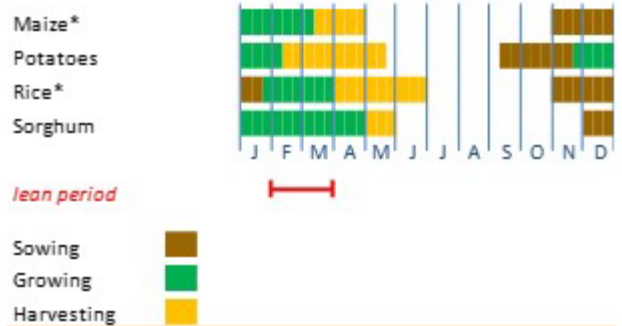
In southern regions of Androy, Anosy, Atsimo Atsinanana and Atsimo Andrefana, monthly rainfall amounts between the start of the planting period in October 2021 and the beginning of the harvest in March 2022 were consistently below the long-term average, curbing yields. These drier-than-average months were punctuated by a period of abundant rainfall in February 2022, caused by tropical cyclones Batsirai and Emnati. Despite some improvement in pasture and crop development, the abundant rains were too late to have a materially positive impact on crops and the intensity of the weather events also led to crop damage. The high levels of poverty and households' structural vulnerability severely limits farmers' ability to mitigate the adverse impact of extreme weather events on agricultural production, contributing to the current high levels of food insecurity. To help address these challenges, in cooperation with the government, FAO distributed sorghum seeds, a more drought-tolerant cereal compared to maize, to 50 000 farming households in five districts in Androy and Anosy. This intervention contributed to keeping the 2022 cereal production at near-average levels in the targeted areas.

Pending the release of official estimates, the 2022 national production of rice, the country's key food staple, is expected to remain above the five-year average. The overall good expectations reflect generally conducive weather conditions in the main

Madagascar

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Madagascar

Cereal Production

	2017-2021 average	2021	2022 forecast	change 2022/2021
	000 tonnes			percent
Rice (paddy)	3 766	4 318	4 500	4.2
Maize	235	232	215	-7.3
Wheat	3	1	2	100.0
Others	1	1	1	0.0
Total	4 005	4 552	4 718	3.6

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

paddy-producing central regions. However, damage caused by successive tropical cyclones and storms caused crop losses in eastern regions.

Adequate rice supplies foreseen at national level in 2022/23

Opening stocks of rice are estimated to be above average in the 2022/23 marketing year (April/March) and, based on an expected above-average harvest, national rice supplies are foreseen to be at satisfactory levels in 2022/23. Compared to the previous year, import requirements are estimated to decline moderately to a below-average level of 500 000 tonnes.

However, in southern rural areas, availabilities of rice and maize are expected to be tight due to the poor harvests in 2022 as well as in the preceding years.

Rice prices rose modestly, while food inflation expected to increase in second half of 2022

According to the latest data from the Institut National de la Statistique (INSTAT), prices of rice increased by 3 percent year on year in May 2022, lower than the 8 percent estimated for the food subcomponent of the national consumer price index. The comparatively subdued price increases of the country's main food staple reflects the generally adequate domestic supplies and low international benchmark prices, unlike prices of other key cereal commodities that have risen steeply since the onset of the war in Ukraine in February 2022.

However, food prices, including rice, are expected to come under increased inflationary pressure in the near-term, owing to the co-occurrence of an upward revision to fuel prices in July, reflecting high global prices and a depreciation of the national currency between June and July that will increase the spillover effects of the already elevated international prices of foods.

Worsening food security conditions in southern regions

According to the latest IPC analysis (May 2022), the prevalence of food insecurity in the southern regions of Androy, Anosy, Atsimo Atsinanana and Atsimo Andrefana is projected to peak at 2.1 million people by December 2022 until at least March 2023. This figure includes 1.8 million people that are anticipated to face IPC Phase 3 (Crisis) and nearly 0.3 people expected to be facing IPC Phase 4 (Emergency) conditions. Overall, the number of people requiring humanitarian assistance by the end of 2022 is expected to be about 30 percent higher compared to the peak number in 2021.

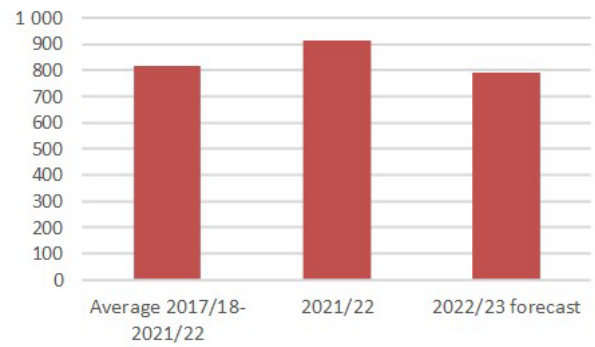
The poor food security situation is mainly the consequence of six consecutive poor agricultural seasons that cumulated in very tight food supplies for rural households and curbed incomes from crop sales. High rates of poverty and increased prices of essential food commodities, combined with a high reliance on market supplies due to low harvests for own consumption, are also contributing to the high rates of food insecurity across the southern regions.

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Cereals Imports

000 tonnes



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

Source: FAO/GIEWS Country Cereal Balance Sheets.



GIEWS Country Brief Madagascar

Reference Date: 28-September-2021

FOOD SECURITY SNAPSHOT

- Favourable weather outlook boosts crop production prospects in 2022
- Despite widespread crop failure in southern regions due to drought conditions, 2021 paddy production estimated at above-average level
- Prices of domestic rice levelled off since April, but higher year on year
- Severe food insecurity conditions in southern regions due to drought and effects of COVID-19 pandemic

Favourable weather outlook boosts crop production expectations in 2022

Planting of the main 2022 season paddy and maize crops is expected to begin in November and the harvest will take place in the second quarter of next year. The minor 2022 season paddy crop, grown in eastern and southeastern areas, has been planted and is to be harvested in December.

Current weather forecasts point to a slightly higher-than-normal likelihood of average to above-average rainfall from October 2021 to March 2022, throughout most of the country, boosting 2022 crop production prospects. Support to agricultural households in southern regions must be scaled up and provided in advance of the start of the season in order to bolster their productive capacity after several years of well below-average harvests.

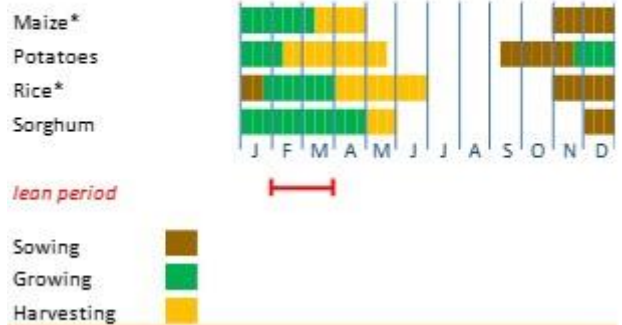
Small production decline nationally in 2021, widespread crop failure in south

Nationally, the 2021 paddy production is estimated at 4 million tonnes, about 6 percent lower year on year, but still 9 percent higher than the five-year average. The above-average national output reflects mostly favourable weather conditions in the main paddy producing central and northern regions, while adverse weather conditions affected yields in southern and eastern areas. In particular, widespread crop failure occurred in the southern regions of Androy, Anosy and Atsimo Andrefana due to significant seasonal rainfall deficits. The impact of the drought is illustrated by the negative anomalies in vegetation conditions in May 2021 (ASI map) and confirmed by field assessments prior to the harvest period that indicated poor crop conditions. Compared to the previous year, the area sown declined in 2021, owing to a poor start of the rainy

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Crop Calendar

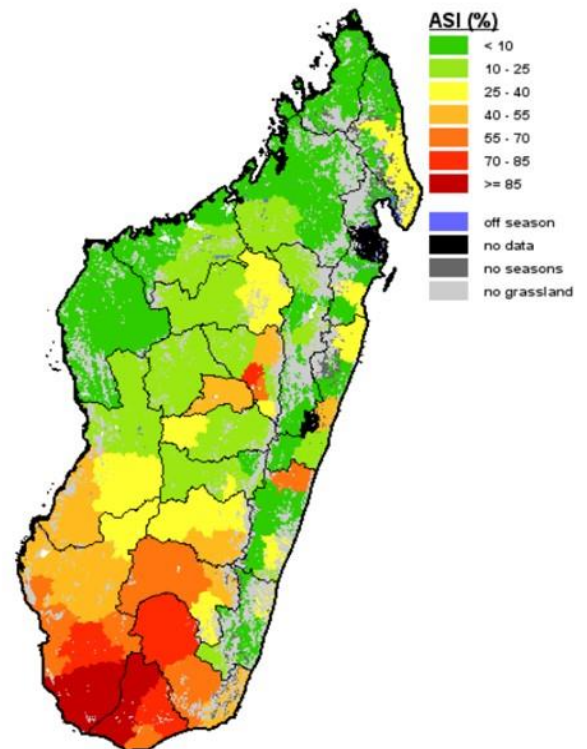
(*major foodcrop)



Source: FAO/GIEWS.

Madagascar - Agricultural Stress Index (ASI)

from start of season 1 to dekad 3, May 2021



Source: FAO/GIEWS Earth Observation System.

season and weak financial capacities of farmers underpinned by the effects of the COVID-19 pandemic on the economy.

Cereal import requirements to increase slightly in 2021/22

The aggregate import requirement of cereals in the 2021/22 marketing year (April/March) is estimated at about 790 000 tonnes, about 5 percent above both the previous year's quantity and the five-year average. Import requirements of rice, which account for the largest share of the foreseen import amount, are estimated at 505 000 tonnes in 2021/22, about 4 percent above the previous five-year average. A drawdown in national rice stocks is forecast in 2021/22, limiting import requirements.

Prices of domestic rice stabilized, but at higher year on year levels 2021

Prices of domestic rice increased between November 2020 and March 2021, owing to seasonally tight supplies, but levelled off in the subsequent months. As of July 2021, on average, prices of domestic rice were about 8 percent above year-earlier levels, mainly reflecting the effects of the year-on year decline of the 2021 output.

Severe acute food insecurity in southern regions

The prevalence and severity of food insecurity increased in 2021 in the southern regions of Androy, Anosy and Atsimo Andrefana, and conditions are projected to worsen by the end of the year. Between April and September 2021, an estimated 1.14 million people, about 43 percent of the analyzed population, are facing acute food insecurity (IPC Phase 3 [Crisis] and above). This number is projected to increase to 1.31 million (49 percent of the analyzed population) between October and December 2021, 24 percent higher on a yearly basis. The projection also indicates an increase in the number of people in the most severe food insecure categories, IPC Phase 4 (Emergency) and Phase 5 (Catastrophe). The population in these categories is currently estimated 0.4 million people, but this number is projected to increase to more than 0.5 million in the last quarter of 2021, of which about 28 000 people (twice the number between April and September 2021) would be in Phase 5 (Catastrophe). Households assessed to be in Phase 5 (Catastrophe) conditions are expected to face the complete lack of food, even after utilizing available coping strategies, and assistance is urgently required to save lives and avoid a collapse of livelihoods.

The primary reasons for the current dire situation and poor outlook are the low cereal harvest obtained in 2021, which cut households' food availability and curbed incomes from crop sales, and the effects of the COVID-19 pandemic, primarily through a reduction in incomes. These effects have been exacerbated by the chronic high rates of poverty, particularly in southern regions.

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Cereal Production

	2016-2020	2020	2021	change
	average		estimate	2021/2020
000 tonnes				
Rice (paddy)	3 665	4 228	3 980	-5.9
Maize	251	225	180	-20.0
Wheat	4	1	1	0.0
Others	1	1	1	0.0
Total	3 922	4 455	4 162	-6.6

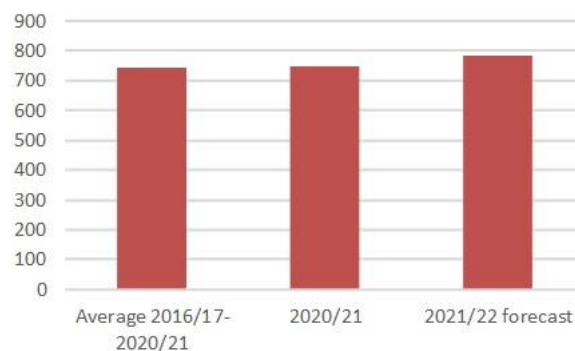
Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Madagascar

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 Madagascar

Reference Date: 06-May-2021

FOOD SECURITY SNAPSHOT

- Widespread crop failure expected in southern regions, but cereal production at national level anticipated at above-average level in 2021
- Cereal import requirements to grow slightly in 2021/22
- Prices of domestic rice continued to increase in 2021 and higher on yearly basis as of February
- An estimated 1.35 million people in need of food assistance in January-April 2021 period and effects of drought expected to considerably worsen situation

Widespread crop failure expected in southern regions

Harvesting of the 2021 cereal crops, mostly rice and maize, is underway and, on account of significant rainfall deficits in southern regions, widespread crop failure is expected in the south. Nationally, paddy production, which is the principal food crop, is expected to remain above average, as more favourable weather conditions have been observed in the main paddy-producing central and northern regions.

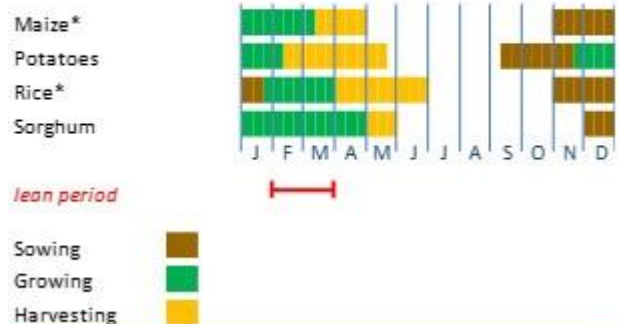
In the southern regions of Androy, Anosy and Atsimo Andrefana, monthly rainfall amounts have been significantly below average since the start of the rainy season in October 2020, resulting in severe drought conditions. Although rainfall amounts increased moderately in February and March, they were too late to have a positive effect on yields. Remote sensing indicators showed significant negative anomalies in vegetation conditions in April 2021 and, corroborated by preliminary field assessments, a widespread cereal crop failure is expected to occur in the three southern regions. In addition to the impact of the drought, a low availability of seeds and infestations of Fall Armyworm have also contributed to the poor production conditions of the maize crops. The low precipitation levels also adversely affected pasture availability and quality (see ASI map); field reports indicate a severe deterioration of livestock body conditions and the situation has been further worsened by outbreaks of Rift Valley Fever that have negatively impacted productivity rates and contributed to a decrease in the price of live animals.

Paddy production in 2021 is forecast to remain at an above-average level in 2021, but the output is foreseen to decline moderately compared to the high outturn of 4.2 million tonnes in 2020. The

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Crop Calendar

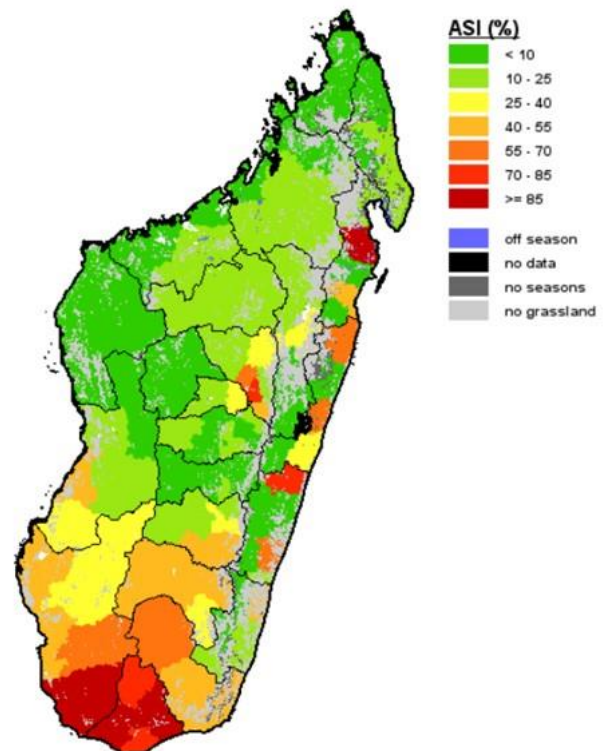
(*major foodcrop)



Source: FAO/GIEWS.

Madagascar - Agricultural Stress Index (ASI) for grassland

From start of season 1, dekad 1, April 2021



Source: FAO/GIEWS Earth Observation System.

anticipated yearly production decrease reflects foreseen poor yields in the south and an overall small contraction in the area sown at the national level, reflecting the poor start of the rainy season and weak financial capacities of farmers, underpinned by the effects of the COVID-19 pandemic on the economy. Paddy yields are expected to remain at average to above-average levels in most of the main producing central and northern regions owing to increased precipitation amounts from December 2020 onwards.

Cereal import requirements to increase slightly in 2021/22

The aggregate import requirement of cereals in the 2021/22 marketing year (April/March) is estimated at 770 000 tonnes, about 4 percent above both the previous year's volume and the five-year average. Import requirements of rice, which account for the largest share of the foreseen import quantities, are estimated at 490 000 tonnes in 2021/22, about 15 percent above the previous five-year average. Import requirements of wheat, which is produced at negligible levels in the country, are estimated at 260 000 tonnes, slightly above the average.

Prices of domestic rice continued to increase in 2021

Prices of domestic rice, following a period of stability during most of 2020, increased between November 2020 and February 2021, owing to seasonally tight supplies. As of February 2021, prices of domestic rice were on average about 7 percent above the year-earlier levels. Price increases in southern provinces were more pronounced, with prices in Toliara, the capital city of the Atsimo Andrefana Region, about 30 percent above their year-earlier values.

Prices of imported rice varieties, which are generally lower cost and less preferred alternatives to domestically produced rice, were mostly constant in 2020 and early 2021 reflecting a relatively stable national exchange rate and international prices.

Acute food insecurity conditions to worsen in 2021

According to the latest IPC analysis, about 1.35 million people were estimated to be acutely food insecure in the southern regions in the January-April 2021 period, 85 percent more than in the corresponding period of 2020. Of particular concern is the increase in the number of people in IPC Phase 4: "Emergency", estimated at 282 000 compared to 37 000 in the first quarter of 2020. The increased prevalence is due to multiple years of reduced agricultural production in southern areas and the negative impact of the COVID-19 pandemic on households' food availability and access, while the high rates of poverty continue to underpin households' high vulnerability to shocks.

Food insecurity conditions in southern regions are expected to deteriorate sharply in 2021 primarily due to the foreseen shortfalls in crop and livestock production, which are likely to reduce households' food availability and also curb incomes from crop sales. Additional concerns arise from a second wave of COVID-19 infections that started in March 2021 and the potential adverse effects of new containment measures, including travel bans within regions, which are likely to negatively affect economic activities and exert pressure on the already eroded resources of the households. Reports from the country indicate that a significant percentage of the households are resorting to crisis or emergency food and livelihood coping strategies, such as skipping meals and selling

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Cereal Production

	2015-2019	2019	2020	change
	average			estimate
000 tonnes				percent
Rice (paddy)	3 564	3 911	4 200	7.4
Maize	272	220	225	2.3
Wheat	5	5	1	-80.0
Others	1	1	1	0.0
Total	3 842	4 137	4 427	7.0

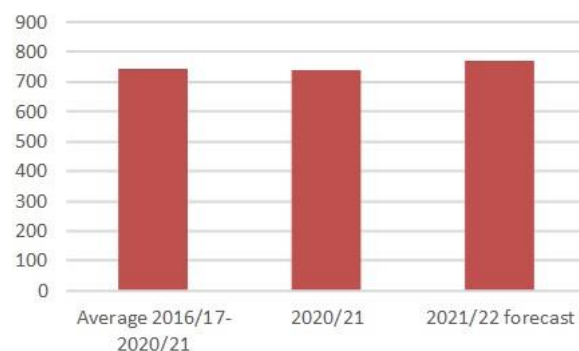
Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Madagascar

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.

valuable productive assets, including livestock or land. Increased resources are urgently needed to scale up humanitarian assistance and prevent a severe deterioration of the acute food insecurity conditions experienced by a large portion of the population in southern regions.

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GIEWS Country Brief Madagascar

Reference Date: 16-November-2020

FOOD SECURITY SNAPSHOT

- Planting of 2021 main cereal crops underway; weather forecasts point to higher chance of below-average seasonal rains
- Paddy production estimated at above-average level in 2020 but maize harvest declined
- Cereal import requirements estimated slightly above average in 2020/21
- Prices of domestic and imported rice slightly higher on yearly basis
- Prevalence of food insecurity expected to remain high in southern regions during 2020

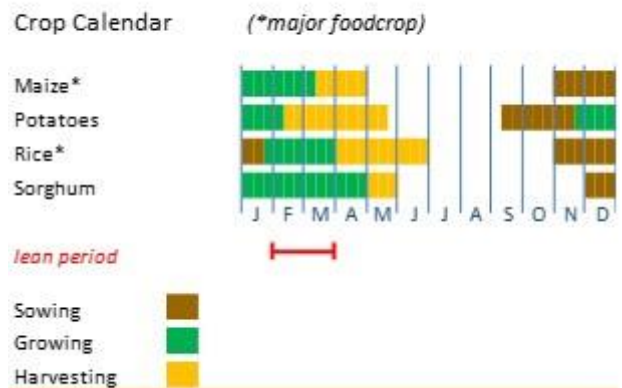
Planting of 2021 main crops underway; weather forecasts point to higher chance of below-average seasonal rains

Planting of the 2021 main season paddy crop, which accounts for the bulk of the annual cereal output, started recently and harvesting is anticipated to begin in the second quarter of next year. The planted area is foreseen to remain close to the previous year's above-average level, amid a favourable start to the 2020/21 rainy season in October in the main producing northern and central regions. Additionally, movement restrictions to contain the spread of the COVID-19 virus were recently lifted, improving farmers' physical access to input markets and fields. However, in southern regions, soil moisture deficits remained as of early November 2020, reflecting the lingering effects of low cumulative rainfall in the previous 2019/20 cropping season and these conditions could curtail plantings.

Weather forecasts for the November 2020-January 2021 period indicate a higher-than-normal likelihood of reduced rainfall amounts throughout the country, which could negatively impact yields. Furthermore, farmers' ability to purchase fertilizers and hire labour is expected to be constrained by the reduced incomes due to the pandemic-induced economic slowdown.

Planting of the 2021 maize crop, mostly produced in southern areas, has also started recently. The area planted is expected to decline from the reduced level in 2019 as farmers have reportedly been switching to alternative crops that are considered to be less susceptible to attacks by Fall Armyworms (FAW). In addition, the low output harvested in 2020 is expected to have reduced the availability of retained seeds.

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Source: FAO/GIEWS.

Madagascar

Cereal Production

	2015-2019 average	2019	2020 estimate	change 2020/2019
	000 tonnes			percent
Rice (paddy)	3 564	3 911	3 900	-0.3
Maize	272	220	205	-6.8
Wheat	5	5	5	0.0
Others	1	1	1	0.0
Total	3 842	4 137	4 111	-0.6

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

Paddy production estimated above average in 2020 but maize harvest declined

Pending official estimates, production of paddy in 2020 is provisionally estimated at an above-average level of 3.9 million tonnes, similar to the previous year. Large outputs were registered in the main producing northern regions due to generally favourable weather conditions. By contrast, paddy crops in southern and western areas were affected by a poor distribution of seasonal rains.

Production of maize in 2020 is estimated at a well below-average level of 205 000 tonnes. The reduced output reflects the low yields and localized crop losses due to erratic rainfall and outbreaks of FAW.

Cereal import requirements estimated slightly above average in 2020/21

The aggregate import requirement of cereals in the 2020/21 marketing year (April/March) is estimated at 715 000 tonnes, slightly above the five-year average and similar to the previous year's level. Import requirements of rice, which account for the largest share of the foreseen import quantities, are estimated at 420 000 tonnes in 2020/21, near the previous five-year average, reflecting adequate market supplies and adequate stocks.

Prices of domestic and imported rice slightly higher on yearly basis

Rice is the national food staple and on average domestic production covers about 85 percent of the consumption requirements. Imported rice is a less preferred variety, but cheaper than the domestically produced rice and it is mostly consumed in the cereal deficit areas of the country.

Prices of domestic and imported rice varieties were generally stable in the May-September 2020 period and, as of September, they were only about 2 percent higher on a yearly basis. The generally stable levels were primarily on account of a good supply situation, while the implementation of a price ceiling on rice products in March 2020, set at MGA 1 800 per kg, helped to prevent the spikes following the introduction of pandemic-associated lockdown measures.

Prevalence of food insecurity expected to remain high in southern regions during 2020

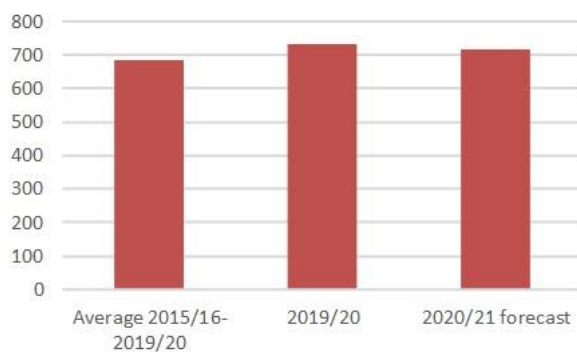
National food security assessments have not been conducted since the outbreak of the COVID-19 pandemic. Therefore, the food security situation is likely to have been more severe than indicated in the latest estimations. According to the IPC analysis released in April 2020, an estimated 554 000 people were projected to be in IPC Phase 3: "Crisis" and Phase 4: "Emergency" during the April-July 2020 period in southern and southeastern regions, already about 10 percent above the previous year's estimate. The higher prevalence of food insecurity mainly reflected reduced crop production and limited income-earning opportunities for the rural households in southern regions.

In the near term, between November 2020 and March 2021, when the main harvest period begins, the number of people in need of humanitarian assistance in southern and southeastern regions is expected to be higher than the 728 000 people estimated in the same period in 2019/20. This outlook mainly reflects the impact of the pandemic-associated economic downturn, with current projections pointing to a 3.2 percent economic contraction in 2020.

Madagascar

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.

The reduction in economic activities have caused a widespread loss of income and livelihoods in the mining, textile and tourism sectors, and a decline in agricultural cash crop sales, particularly vanilla, due to a reduction in global demand. These losses are expected to have sharply reduced the households' purchasing power and, therefore, limited their ability to buy foods. In addition, a reported oversupply of labour in rural areas, as people remain reluctant to return to urban centres due to concerns regarding COVID-19, could suppress agricultural wages and further reduce households' income earning potential. The generally adequate supplies of rice and the stable prices of rice products are mitigating some of these negative impacts on food security.

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GIEWS Country Brief Madagascar

Reference Date: 10-July-2020

FOOD SECURITY SNAPSHOT

- Paddy production in 2020 is forecast at near-average level
- Cereal import requirements are estimated slightly above-average in 2020/21
- Prices of rice are currently slightly higher than year-earlier levels
- Over half a million people were estimated to be food insecure in southern regions during the first half of 2020, however this figure does not include analysis of the COVID-19 pandemic's impact on food security

Paddy production in 2020 is forecast at a near-average level

Harvesting of the 2020 main paddy crop is nearly complete and the national output is preliminary forecast at a near-average level of 3.7 million tonnes, 8 percent below the previous year's bumper outturn. The expected production decline, which might be larger than initially anticipated due to pending revisions of crop loss estimates, reflects erratic and below-average cumulative rainfall that curtailed plantings and dampened yields in the southern regions of Anosy and Ihorombe as well as in parts of the central highlands and the western Menabe region. In most of the main paddy-producing northern regions, weather conditions were mostly beneficial. However, some localized crop losses were reported due to the impact of torrential rains in late December and early January, while rainfall shortages towards the end of the season are expected to have curbed yield potentials. Overall, average to above-average paddy harvests in the northern regions are anticipated to partially offset the reduced harvests in the south and centre, resulting in a near-average national output in 2020.

Harvesting of the 2020 maize crop concluded recently and the output is estimated at a well below-average level of 205 000 tonnes. The low output reflects localized crop losses in the north caused by floods in January and low crop productivity in the south, on account of significant rainfall deficits. An estimated contraction in the area sown with maize, reflecting farmers preference to plant alternative crops that were considered to be less susceptible to attacks by Fall Armyworms, further contributed to the reduced output in 2020.

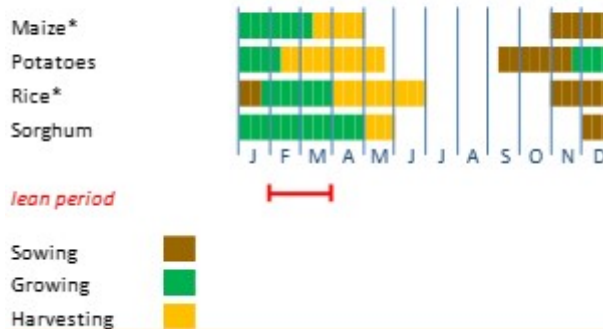
Cereal import requirements are estimated slightly above average in 2020/21

The aggregate import requirement of cereals in the 2020/21 marketing year (April/March) is estimates at

Madagascar

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Madagascar

Cereal Production

	2015-2019 average	2019	2020 forecast	change 2020/2019
	000 tonnes			percent
Rice (paddy)	3 564	3 911	3 720	-4.9
Maize	272	220	205	-6.8
Wheat	5	5	5	0.0
Others	1	1	1	0.0
Total	3 842	4 137	3 931	-5.0

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

720 000 tonnes, slightly above the five-year average and similar to the previous year's level. Import requirements of rice, which account for the largest share of the expected import quantity, are estimated at 420 000 tonnes in 2020/21, slightly below the previous five-year average, reflecting sufficient supplies from the bumper harvest in 2019 and adequate stocks.

Prices of rice rise slightly, but remain stable year on year

Prior to the first case of COVID-19 in the country and the implementation of lockdown measures to contain the spread of the virus in March, prices of rice were generally stable. This reflected an adequate supply situation following the 2019 bumper harvest as well as a generally firm exchange rate and stable international prices of rice that limited imported inflation. As part of measures to abate the impact of the COVID-19 movement restrictions on consumers, the Government introduced a ceiling price on rice products, set at MGA 1 800 per kg. Despite this introduction, there were modest increases in rice prices in the March-May period and prices were about 2 percent higher on a year basis.

Prevalence of food insecurity is expected to remain high in southern regions during 2020

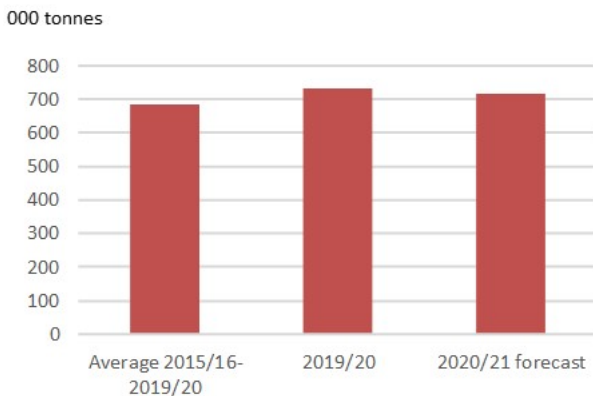
According to the last IPC analysis released in April 2020, an estimated 554 000 people were projected to be in IPC Phase 3: "Crisis" and Phase 4: "Emergency" during the April-July 2020 period in southern and southeastern regions, about 10 percent above the previous estimate. The higher prevalence of food insecurity mainly reflects the lower availability and access to food, owing to reduced crop production and limited income-earning opportunities for rural households in southern regions.

The likely impacts of the COVID-19 pandemic were not included in the latest estimation and, therefore, the food security situation is expected to be more severe. The containment measures are estimated to have caused disruptions in the food supply chain, adding pressure to food prices especially in the south, as well as constrained domestic migration to find employment outside of the agriculture sector. Due to the widespread reduction in economic activities, remittances from the urban centers to southern areas are also expected to have fallen.

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Madagascar

Cereals Imports



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

Source: FAO/GIEWS Country Cereal Balance Sheets.



GIEWS Country Brief Madagascar

Reference Date: 10-July-2020

FOOD SECURITY SNAPSHOT

- Paddy production in 2020 is forecast at near-average level
- Cereal import requirements are estimated slightly above-average in 2020/21
- Prices of rice are currently slightly higher than year-earlier levels
- Over half a million people were estimated to be food insecure in southern regions during the first half of 2020, however this figure does not include analysis of the COVID-19 pandemic's impact on food security

Paddy production in 2020 is forecast at a near-average level

Harvesting of the 2020 main paddy crop is nearly complete and the national output is preliminary forecast at a near-average level of 3.7 million tonnes, 8 percent below the previous year's bumper outturn. The expected production decline, which might be larger than initially anticipated due to pending revisions of crop loss estimates, reflects erratic and below-average cumulative rainfall that curtailed plantings and dampened yields in the southern regions of Anosy and Ihorombe as well as in parts of the central highlands and the western Menabe region. In most of the main paddy-producing northern regions, weather conditions were mostly beneficial. However, some localized crop losses were reported due to the impact of torrential rains in late December and early January, while rainfall shortages towards the end of the season are expected to have curbed yield potentials. Overall, average to above-average paddy harvests in the northern regions are anticipated to partially offset the reduced harvests in the south and centre, resulting in a near-average national output in 2020.

Harvesting of the 2020 maize crop concluded recently and the output is estimated at a well below-average level of 205 000 tonnes. The low output reflects localized crop losses in the north caused by floods in January and low crop productivity in the south, on account of significant rainfall deficits. An estimated contraction in the area sown with maize, reflecting farmers preference to plant alternative crops that were considered to be less susceptible to attacks by Fall Armyworms, further contributed to the reduced output in 2020.

Cereal import requirements are estimated slightly above average in 2020/21

The aggregate import requirement of cereals in the 2020/21 marketing year (April/March) is estimates at

Madagascar

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Madagascar

Cereal Production

	2015-2019 average	2019	2020 forecast	change 2020/2019
	000 tonnes			percent
Rice (paddy)	3 564	3 911	3 720	-4.9
Maize	272	220	205	-6.8
Wheat	5	5	5	0.0
Others	1	1	1	0.0
Total	3 842	4 137	3 931	-5.0

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

720 000 tonnes, slightly above the five-year average and similar to the previous year's level. Import requirements of rice, which account for the largest share of the expected import quantity, are estimated at 420 000 tonnes in 2020/21, slightly below the previous five-year average, reflecting sufficient supplies from the bumper harvest in 2019 and adequate stocks.

Prices of rice rise slightly, but remain stable year on year

Prior to the first case of COVID-19 in the country and the implementation of lockdown measures to contain the spread of the virus in March, prices of rice were generally stable. This reflected an adequate supply situation following the 2019 bumper harvest as well as a generally firm exchange rate and stable international prices of rice that limited imported inflation. As part of measures to abate the impact of the COVID-19 movement restrictions on consumers, the Government introduced a ceiling price on rice products, set at MGA 1 800 per kg. Despite this introduction, there were modest increases in rice prices in the March-May period and prices were about 2 percent higher on a year basis.

Prevalence of food insecurity is expected to remain high in southern regions during 2020

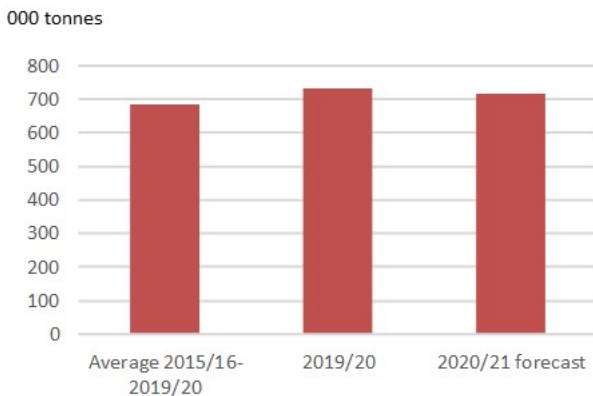
According to the last IPC analysis released in April 2020, an estimated 554 000 people were projected to be in IPC Phase 3: "Crisis" and Phase 4: "Emergency" during the April-July 2020 period in southern and southeastern regions, about 10 percent above the previous estimate. The higher prevalence of food insecurity mainly reflects the lower availability and access to food, owing to reduced crop production and limited income-earning opportunities for rural households in southern regions.

The likely impacts of the COVID-19 pandemic were not included in the latest estimation and, therefore, the food security situation is expected to be more severe. The containment measures are estimated to have caused disruptions in the food supply chain, adding pressure to food prices especially in the south, as well as constrained domestic migration to find employment outside of the agriculture sector. Due to the widespread reduction in economic activities, remittances from the urban centers to southern areas are also expected to have fallen.

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Madagascar

Cereals Imports



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

Source: FAO/GIEWS Country Cereal Balance Sheets.



GIEWS Country Brief Madagascar

Reference Date: 07-April-2020

FOOD SECURITY SNAPSHOT

- Paddy production in 2020 forecast at near-average level
- Cereal import requirements estimated slightly above-average in 2019/20
- Prices of rice in last quarter of 2019 were lower than year-earlier levels due to larger national supplies
- Prevalence of food insecurity expected to remain high in southern regions during first half of 2020

Paddy production in 2020 expected at near-average level

Harvesting of the main 2020 season paddy crop began in April and national production is anticipated at a near-average level.

In most of northern and central regions, weather conditions from the start of the main season in October to early December 2019 generally favoured the development of paddy crops. However, torrential rains in late December in northern areas triggered floods and caused localized crop losses, while an uneven distribution of rainfall in January and February 2020 dampened yield expectations in some of the main paddy-producing areas in the central highlands. Minimal damage to crops was caused by the passage of Tropical Cyclone Herold in mid-March, which brought strong winds and heavy rains to northeastern regions and caused localized floods.

In southern regions, including the rainfed paddy-producing districts in Anosy and Ihorombe, rainfall has been erratic and seasonal totals have been well below average, hindering crop development. Consequently, paddy yields in these areas are forecast to be below average in 2020.

Harvesting of the 2020 maize crop is underway and the output is forecast at a below-average level. The expected low output reflects localized crop losses in the north caused by floods in January and a reduced area sown with maize, as farmers preferred to plant alternative crops that were considered to be less susceptible to attacks by Fall Armyworms.

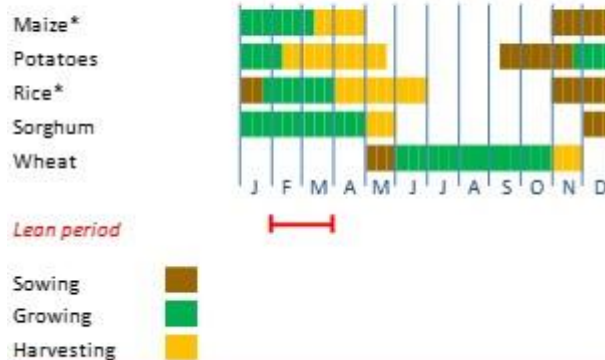
Cereal import requirements estimated slightly above-average in 2019/20

The aggregate import requirements of cereals in the 2019/20 marketing year (April/March) are estimated at an above-average level of 820 000 tonnes. Despite the rebound in paddy production in 2019, import requirements of rice, which account for the largest

Madagascar

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Madagascar

Cereal Production

	2014-2018 average	2018	2019 estimate	change 2019/2018
	000 tonnes			percent
Rice (paddy)	3 587	3 320	3 911	17.8
Maize	301	215	220	2.3
Wheat	5	5	5	0.0
Others	1	1	1	0.0
Total	3 895	3 541	4 137	16.8

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

share of cereal imports, are forecast at 450 000 tonnes in 2019/20, 15 percent above the average, as the country seeks to replenish its stocks and buffer domestic availabilities following two consecutive years of below-average paddy harvests.

Prices of rice in last quarter of 2019 were lower than year-earlier levels due to larger national supplies

In line with the seasonal trends, prices of imported and local rice varieties increased between July and November 2019 and remained stable in December when the new supplies from the 2020 minor first season harvest boosted market availabilities. In December, prices of imported and local rice were, on average, about 4 percent lower than one year before, reflecting the overall improved national supply situation following the 2019 bumper harvest. Stable exchange rates and international prices of rice contributed to limit imported inflation in 2019 and lessened the upward pressure on domestic rice prices.

Prevalence of food insecurity projected to remain high in southern regions during first half of 2020

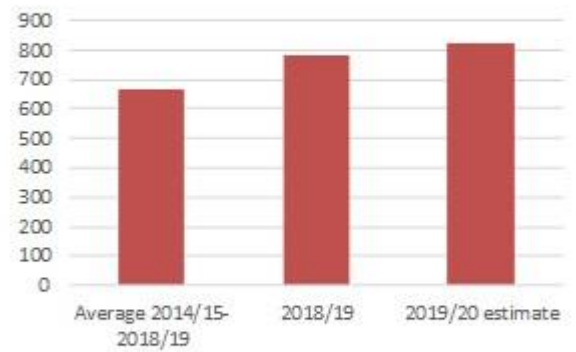
The number of people experiencing acute food insecurity in early 2020 is estimated to have declined by almost 30 percent compared to the corresponding period of the previous year, mainly due to improved domestic availabilities of staple foods (rice, maize and cassava) and lower prices of cereals. However, according to the latest IPC acute food insecurity analysis, in southern and southeastern regions still an estimated 415 000 people were projected to be in IPC Phase 3: "Crisis" and Phase 4: "Emergency" during the April-June 2020 period. This localized high prevalence is mainly due to limited availability and access to food, owing to reduced cereal production and limited income-earning opportunities for rural households in southern regions.

The risk posed by the COVID-19 pandemic, both through the negative impacts associated with a reduction in economic activities and the potential adverse effects on localized supply levels, is an additional concern for food security across the country. An updated assessment of the food insecurity situation is expected to be available by the end of April and will provide estimates on the number of people assessed to be facing IPC Phases 3 and 4.

Madagascar

Cereals Imports

000 tonnes



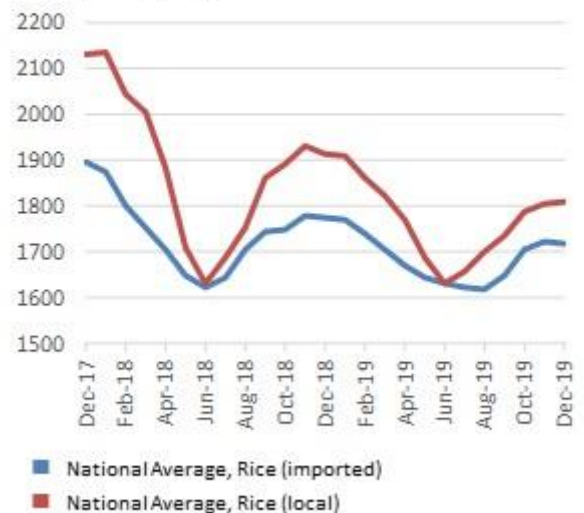
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Madagascar

Retail prices of rice

Malagasy Ariary per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

COVID-19 and measures adopted by the Government

In response to the COVID-19 pandemic, all national borders were closed for a period of 30 days from 19 March 2020 and quarantine restrictions were implemented in the two main cities of Antananarivo and Toamasina from 23 March and in Fianarantsoa from 5 April. These containment measures, however, have not been applied to individuals within the agriculture and food supply chains. For example, agricultural labourers are exempt from travel restrictions and the movement of food and agricultural inputs are permitted.

To temper the potential excessive price movements, a price ceiling has been established for rice products, set at MGA 1 800/kg. In addition, the Government has expanded a pre-existing food subsidy programme through the establishment of new distribution points that will increase the geographic coverage. Furthermore, a new food assistance initiative will distribute 240 000 baskets of basic food items to persons that have been assessed to be most vulnerable to the impact of quarantine measures.

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GIEWS Country Brief Madagascar

Reference Date: 17-February-2020

FOOD SECURITY SNAPSHOT

- National cereal production in 2020 expected to decrease from high outturn in 2019, but remain at near-average level
- Paddy harvest in 2019 estimated at above-average level, reflecting large plantings and high yields
- Cereal import requirements estimated to increase slightly in 2019/20
- Improved national supplies tempered seasonal price increases and kept prices lower on yearly basis in 2019
- Despite declining in 2019/20, prevalence of food insecurity remains high in southern regions

National cereal production in 2020 expected to decrease from high outturn in 2019, but remain at near-average level

The main 2020 season paddy crop is expected to be harvested from April and vegetation conditions, as of January 2020, were mostly favourable in the key-producing central and northern regions, while they were at below-average levels in the south due to rainfall deficits.

In the north and most of the centre, weather conditions since the start of the cropping season in October have been generally beneficial for early crop development. However, torrential rains in northern regions at the end of December and in January triggered floods and caused localized crop losses, mostly concentrated in riverine areas in the regions of Alaotra Mangoro, Boeny and Sofia. In addition, an erratic distribution of seasonal rainfall in parts of the central provinces stressed crops and dampened yield expectations.

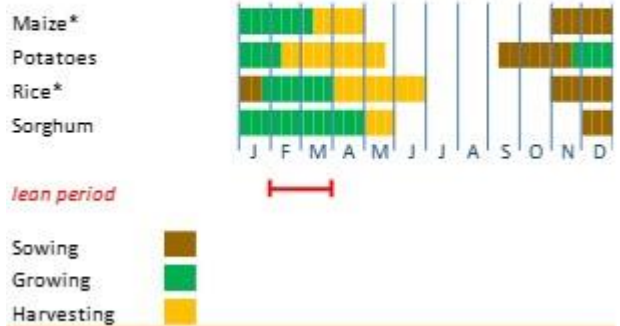
In the southern regions, which have experienced prolonged periods of drought conditions in successive cropping seasons, cumulative rainfall between October 2019 and January 2020 was well below average, reducing production prospects of the 2020 cereal crops in these areas.

Based on the generally favourable crop conditions in the main paddy-producing areas, national production is expected at a near-average level in 2020. However, reflecting localized losses of standing crops in the north and lower yield prospects due to adverse weather in the south, the national harvest is expected to decline compared to the high outturn of 2019.

Madagascar

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Madagascar

Cereal Production

	2014-2018 average	2018	2019 estimate	change 2019/2018
	000 tonnes			percent
Rice (paddy)	3 587	3 320	3 911	17.8
Maize	301	215	220	2.3
Wheat	5	5	5	0.0
Others	1	1	1	0.0
Total	3 895	3 541	4 137	16.8

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Above-average paddy production estimated in 2019

Paddy production in 2019 was estimated at about 3.9 million tonnes, 9 percent above the previous five-year average. Production increases were reported across most regions, mainly due to an above-average area planted and high yields resulting from conducive rainfall and temperatures throughout the cropping season.

Production of maize in 2019 was estimated at a well below-average level of 220 000 tonnes, reflecting a reduction in area planted. The reduced area sown to maize was partly caused by infestations of Fall Armyworms, reported in the country since 2017, which prompted farmers to decrease plantings.

Cereal import requirements estimated to increase slightly in 2019/20

The aggregate import requirements of cereals in the 2019/20 marketing year (April/March) are estimated at an above-average level of 600 000 tonnes. Despite the rebound in paddy production in 2019, import requirements of rice, which account for the largest share of imports, are forecast at 450 000 in 2019/20, 15 percent above the average, as the country seeks to replenish stocks and buffer domestic availabilities following two consecutive years of below-average paddy harvests. Import requirements of wheat are forecast at 130 000 tonnes, 7 percent above the average.

Larger national supplies kept prices lower on yearly basis

In line with seasonal trends, prices of imported and local rice varieties increased consistently between July and November 2019 and remained stable in December when new supplies from the 2020 minor first season harvest boosted market availabilities. In December, prices of imported and local rice were on average about 4 percent lower than one year before, reflecting the overall improved national supply situation following the 2019 bumper harvest. Stable exchange rates and international prices of rice have also contributed to limit imported inflation in 2019 and lessened upward pressure on domestic rice prices.

Despite declining in 2019/20, prevalence of food insecurity remains high in southern regions

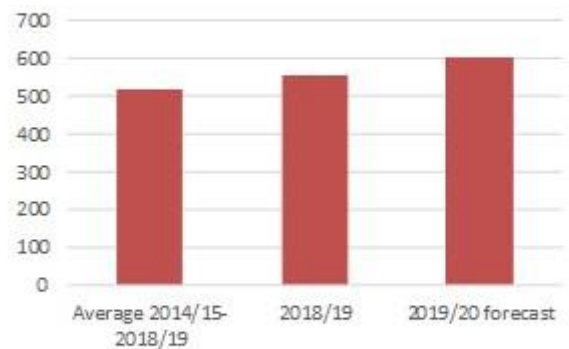
The number of people experiencing acute food insecurity in early 2020 is estimated to have declined by almost 30 percent compared to the corresponding period of the previous year, mainly due to improved domestic availabilities of staple foods (rice, maize and cassava) and lower prices of cereals. However, according to the latest IPC acute food insecurity analysis, in southern and southeastern regions still an estimated 730 000 people were projected to be in IPC Phase 3: "Crisis" and Phase 4: "Emergency" until March 2020, just prior to the main harvest period.

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Madagascar

Cereals Imports

000 tonnes



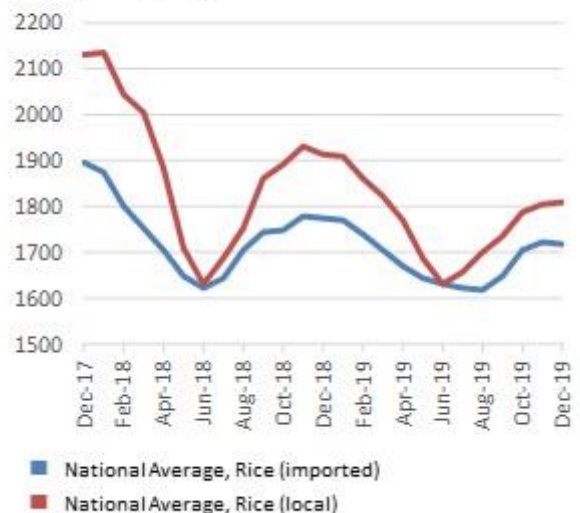
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Madagascar

Retail prices of rice

Malagasy Ariary per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Madagascar

Reference Date: 20-November-2019

FOOD SECURITY SNAPSHOT

- Planting of 2020 paddy crops underway following favourable weather conditions
- Paddy production in 2019 estimated at above-average level, reflecting larger plantings and higher yields
- Prices of rice increased seasonally since July 2018, but were lower year on year in October 2019 due to improved national supplies
- Number of food insecure declined due to impact of larger 2019 cereal harvest

Planting of 2020 paddy crops underway following favourable weather conditions

Planting of the 2020 main season cereal crops, mainly paddy, has recently started and is expected to continue until mid-January. Overall, adequate and well-distributed rains from October have boosted soil moisture levels and supported planting activities.

The latest seasonal weather forecasts indicate a higher likelihood of average to above-average rainfall for the period between November 2019 and March 2020 in the key paddy-producing areas, located in the central and northern regions. By contrast, rainfall is forecast at below-average levels for the same period in most southern regions, which normally experience prolonged periods of drought conditions.

Above-average paddy production estimated in 2019

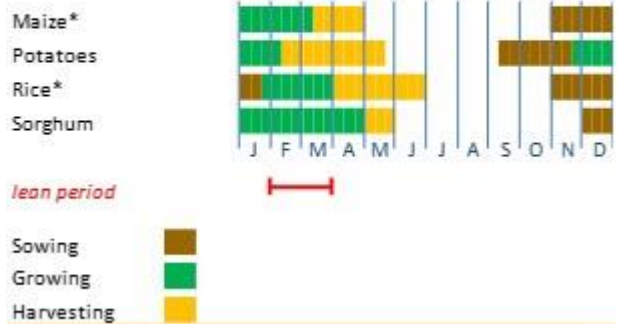
Harvesting of the 2019 paddy crop concluded in July and production is estimated at about 3.9 million tonnes, 9 percent above the previous five-year average. Production increases were reported across most regions, mainly due to an above-average area planted and high yields resulting from conducive rainfall and temperatures throughout the cropping season.

Harvesting of the 2019 maize crop concluded last April and production is estimated at 220 000 tonnes, slightly above the previous year's low level but still well below the five-year average. In spite of an estimated increase in yields this year, supported by favourable weather conditions, a lower-than-average area planted kept this year's harvest at a low level. The reduced area sown to maize was partly caused by

Madagascar

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Madagascar

Cereal Production

	2014-2018 average	2018	2019 estimate	change 2019/2018
	000 tonnes			percent
Rice (paddy)	3 587	3 320	3 911	17.8
Maize	301	215	220	2.3
Wheat	5	5	5	0.0
Others	1	1	1	0.0
Total	3 895	3 541	4 137	16.8

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

infestations of Fall Armyworms, reported in the country since 2017, which prompted farmers to decrease plantings.

Cereal import requirements increase slightly in 2019/20

The aggregate import requirement of cereals in the 2019/20 marketing year (April/March) are forecast to increase to an above-average level of 600 000 tonnes. Despite the rebound in paddy production in 2020, import requirements of rice, which account for the largest share of imports, are forecast at 450 000 in 2019/20, 15 percent above the average, as the country seeks to replenish stocks and buffer domestic availabilities following two consecutive years of below average paddy harvests. Import requirements of wheat are forecast at 130 000 tonnes, 7 percent above the average, reflecting increasing demand for food use.

Prices of rice increased seasonally but lower on a yearly basis

Prices of rice have increased seasonally in the past four months but, as of October 2019, they were lower year on year as the 2019 bumper harvest boosted national supplies. Stable exchange rates and international prices of rice have also contributed to limiting imported inflation in 2019 and lessening upward pressure on domestic rice prices.

High prevalence of severe food insecurity persists in spite of improved 2019 harvests

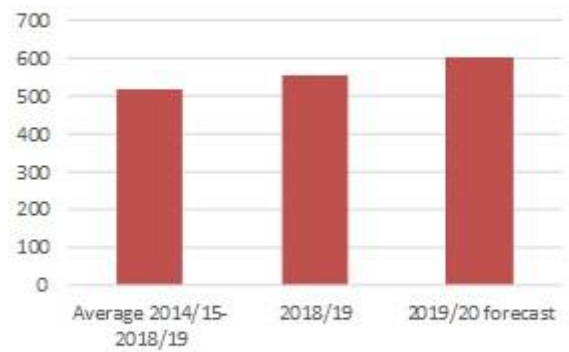
The number of people experiencing severe food insecurity declined by almost 30 percent in 2019, mainly due to improved domestic availabilities of staple foods (rice, maize and cassava) and lower prices of cereals compared to the previous year. According to the latest Vulnerability Assessment Committee's (VAC) evaluation, about 916 000 people are estimated to be in IPC Phase 3: "Crisis" and Phase 4: "Emergency" in December 2019, well below 1.26 million people in the previous year.

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Madagascar

Cereals Imports

000 tonnes



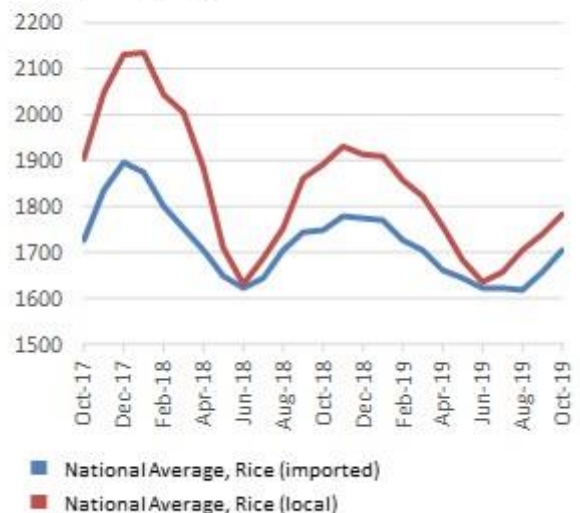
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Madagascar

Retail prices of rice

Malagasy Ariary per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Madagascar

Reference Date: 06-June-2019

FOOD SECURITY SNAPSHOT

- Generally favourable weather conditions expected to result in larger paddy harvest in 2019, but output forecast to remain below average
- Imports of rice in 2019/20 marketing year foreseen to remain unchanged on yearly basis, enabling the country to buffer national availabilities and replenish stocks
- Prices of rice declined between January and May 2019, weighed down by good first season harvest and favourable production prospects for main season's output
- Small production increases in vulnerable southern provinces expected to help stabilize food security conditions that, however, still remain serious concern

Paddy production forecast to rise in 2019

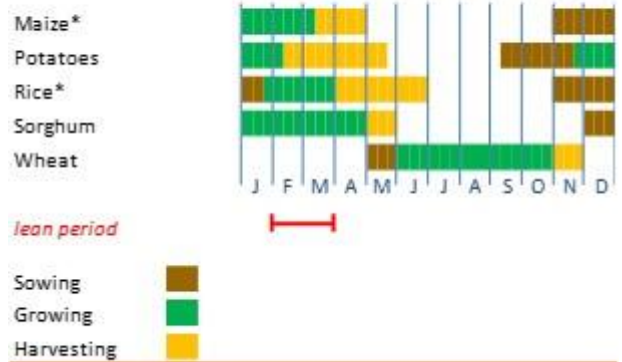
Harvesting of the 2019 main season paddy crop is underway and is expected to conclude in early July.

Rains were generally satisfactory over most of the country since the start of the cropping season in October 2018, positively impacting the production outlook for the 2019 cereal crop. Reflecting the rainfall patterns, vegetation conditions, based on remote sensing analysis, were mostly favourable in May in the main paddy-producing regions in the centre, inferring a likely increase in yields and the area harvested. In addition, in the southern regions, near-normal rainfall volumes, although unevenly distributed temporally, are anticipated to cause a minor increase in cereal production, following successive years of sharply reduced outputs. Infestations of Fall Armyworms were also reported to have caused yield losses in southern regions.

Overall, the national paddy production is expected to increase in 2019 for a second consecutive year and could reach a level close to the five-year average (2013-2017). However, underlying structural factors, including poor access to inputs, such as improved seed varieties and an inadequate irrigation system that continues to severely impede farmers' productive capacities, are expected to curtail the larger production gains.

Madagascar

Crop Calendar (*major foodcrop)



Source: FAO/GIEWS.

Madagascar

Cereal Production

	2013-2017 average	2017	2018 estimate	change 2018/2017
	000 tonnes			percent
Rice (paddy)	3 645	3 101	3 328	7.3
Maize	335	281	215	-23.5
Wheat	5	5	5	0.0
Others	1	1	1	0.0
Total	3 986	3 388	3 549	4.8

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Import volumes likely to remain unchanged in 2019/20

Despite an expected increase in paddy production, the quantity of imported rice in the 2019/20 marketing year (April/March) is foreseen to remain unchanged on a yearly basis, as the country seeks to replenish stocks and buffer domestic availabilities following consecutive years of below average harvests. In the previous 2018/19 marketing year, rice imports were estimated at about 413 000 tonnes, an above average quantity but down from the high level of 730 000 tonnes imported in 2017/18 when domestic availabilities were significantly cut due to a sharp decline in paddy production.

Prices of rice declined, weighed by positive production prospects

Prices of rice, the main food staple, declined seasonally between January and May 2019, as new supplies from the first season harvest boosted market availabilities. Moreover, favourable production prospects for the main paddy harvest weighed on prices. Stable exchange rates and international prices have also contributed to easing pressure on prices of imported rice varieties.

Food security remains concern in southern regions

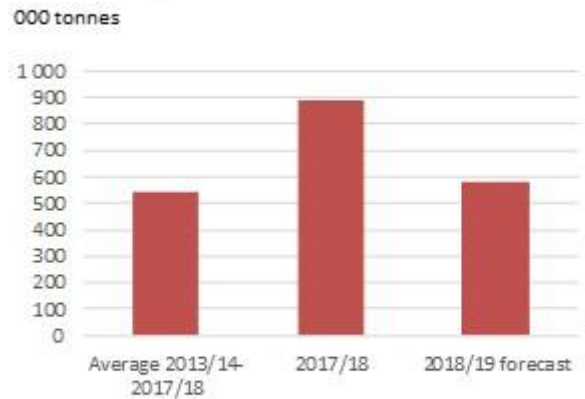
New supplies from the 2019 main harvest are expected to instigate seasonal improvements in food security conditions in the vulnerable southern regions of Androy and Anosy. Although the harvests in these areas are likely to be slightly higher than the previous year, they are still foreseen to remain well below average and consequently the prevalence of food insecurity is expected to remain high, compelling households to continue to adopt coping strategies.

During the first quarter of 2019, an estimated 0.5 million people in the two aforementioned regions were estimated to be food insecure, representing about 44 percent of the regions' population.

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Madagascar

Cereals Imports

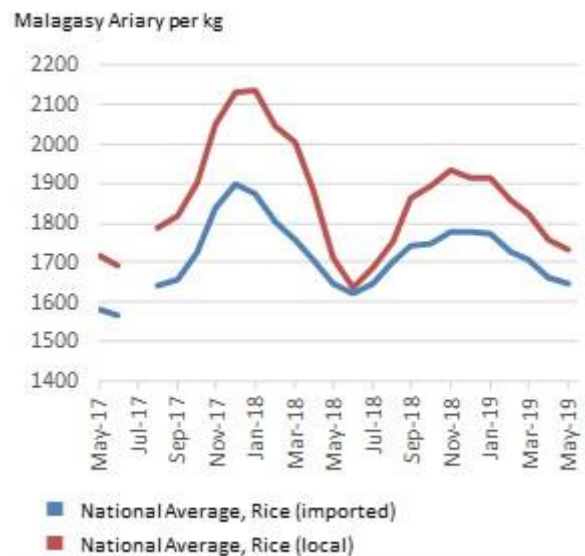


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Madagascar

Retail prices of rice



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Madagascar

Reference Date: 11-January-2018

FOOD SECURITY SNAPSHOT

- Cyclone Ava brings heavy rains to eastern regions in early 2018
- Rice production in 2017 estimated at well below-average level mainly reflecting dry conditions in main-producing areas
- Prices of rice in 2017 up on annual basis, mostly on account of tighter supplies
- Moderate improvement in food security situation in southern regions, but conditions worsened in southeastern areas due to weather shocks

Heavy rains impact coastal regions in early 2018

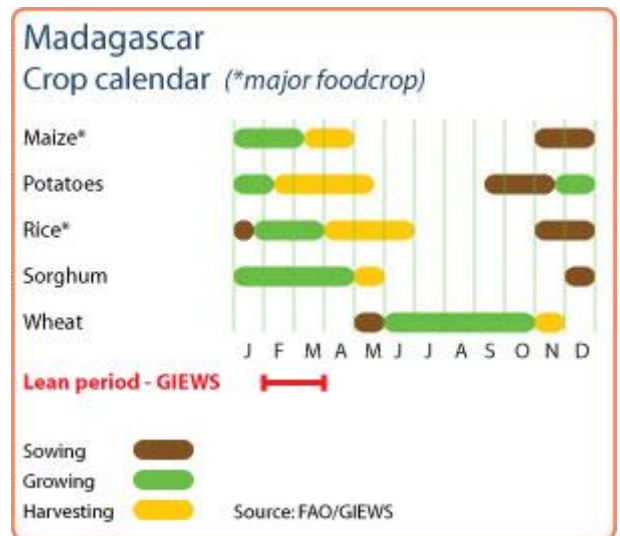
Harvesting of the 2018 minor first season rice crop is underway, while the 2018 main (secondary) season rice crop is being transplanted and is expected to be harvested from April 2018. Weather conditions across most of the country were generally favourable in the last quarter of 2017, except for some minor producing areas in the southwest, where below-average rains have stressed vegetation conditions.

At the start of January 2018, Cyclone Ava hit eastern coastal regions, bringing heavy rains and strong winds. Although information on the impact to the agriculture sector is not yet available, localized flooding may have damaged transplanted rice crops and could impede the harvesting of the first season crops, resulting in production losses in the affected areas.

Regarding overall rice plantings for 2018, given farmers' high reliance on retained seeds and the low availability of improved varieties in the country, the reduced output in 2017 may have negatively impacted the sown area for the 2017/18 season.

Dry conditions cut rice production to below average levels in 2017

According to the 2017 Crop and Food Security Assessment Mission (CFSAM), conducted by FAO and WFP, national rice production is estimated at about 3.1 million tonnes in 2017, a decrease of 20 percent on an annual basis and about 21 percent down from the previous five-year average. Maize production is estimated at 281 000 tonnes, a year-on-year decline of 11 percent, and the national cassava output is estimated at about



Madagascar
Cereal production

	2012-2016 average	2016	2017 estimate	change 2017/2016
	000 tonnes			percent
Rice (paddy)	3 935	3 815	3 100	-19
Maize	366	316	281	-11
Wheat	6	5	5	0
Others	1	1	1	0
Total	4 308	4 137	3 388	-18

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

2.5 million tonnes, a 4 percent reduction compared to last year, with both outputs below their respective averages.

The below-average outputs mostly result from insufficient and poorly distributed rainfall in the main rice-producing regions of the country, reflecting a delayed start of the rainy season and a dry period (three months of below-average rains between December 2016 and February 2017). The resulting water deficits caused a contraction in plantings, restrained crop development and resulted in below average yields, triggering a sharp reduction in the 2017 rainfed and irrigated rice outputs. In addition, Cyclone Enawo, which traversed the country in March 2017, brought heavy rains that caused flood damage. However, in areas where the cyclone damage was negligible, the associated heavy rains partially alleviated the water deficits, limiting the impact of early seasonal water stress and curbing further production losses.

Restrained access to inputs, including improved seed varieties and an inadequate irrigation system, further underpinned the weak agricultural performance in 2017, given farmers' high exposure to climate effects.

At the subnational level, the largest year-on-year decreases in rice production were in the north and central main rice-producing regions. By contrast, production in the southern regions of Androy and Anosy increased on an annual basis on account of favourable weather conditions, following three consecutive years of dry weather-reduced outputs (2013-2015). However, the harvests in these regions still remained below average and are of comparatively minor quantities in relation to the national output.

Import requirements increase to compensate for reduced harvest

Rice import requirements in the 2017/18 marketing year (April/March) are estimated at about 560 000 tonnes, well above the previous year and average, reflecting the reduced production and low stocks. Between April and October 2017, an estimated 320 000 tonnes of rice had already been imported, well above the volume imported in the entire 2016/17 marketing year (April/March). In total, above 800 000 tonnes of cereals are needed to meet the domestic supply gap in 2017/18 and maintain near-stable consumption levels.

Rice prices pushed up by tighter supplies

Expectations of a reduced output triggered rice price increases across the country during 2017, which were further underpinned by low stock levels. Although prices stabilized from May for a few months, reflecting new availabilities from the main harvest and large import volumes that eased supply pressure, prices remained generally higher on a yearly basis as of October 2017.

Food security conditions improved in southern regions, but situation worsened in southeastern areas

Based on the results from the CFSAM, food security conditions improved in the vulnerable southern regions of Androy and Anosy, mostly resulting from the moderate upturn in cereal production. However, due to weather shocks, there was a worsening of conditions in southeastern areas.

In 2017/18, over 407 000 people are estimated to be severely food insecure in the south and southeast and, without adequate external assistance, they are unable to meet their food needs. An

additional 1.7 million people are estimated to be moderately food insecure, inferring they are generally able to meet their food needs, except if there is a major shock. However, 35 percent of these people (approximately 595 000) were reported to be already adopting negative coping strategies or were spending a greater share of their income on food at the expense of other necessities, including health and education and, therefore, remain at a high risk of falling into severe food insecurity without humanitarian assistance.

Disclaimer: The designations employed and the presentation of material in this information product do not imply the expression of any opinion whatsoever on the part of FAO concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries.



GIEWS Country Brief Madagascar

Reference Date: 25-April-2017

FOOD SECURITY SNAPSHOT

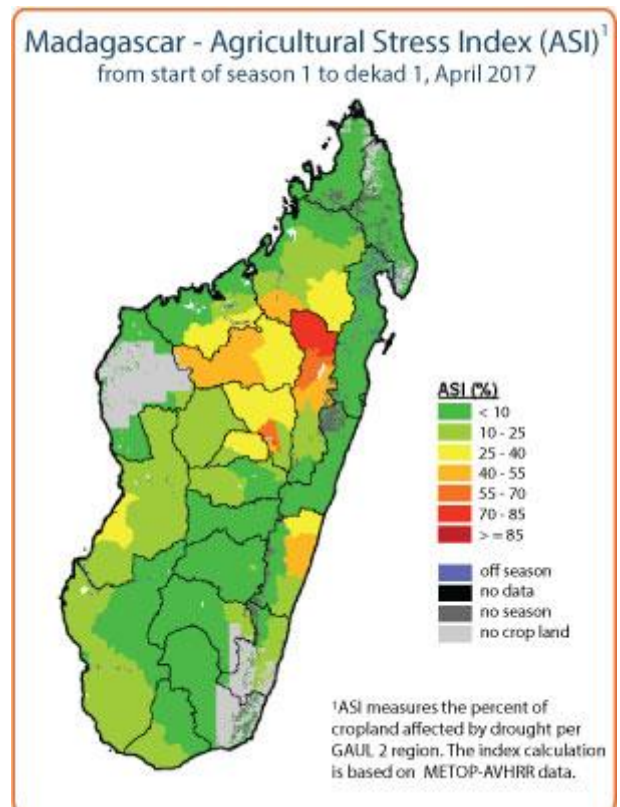
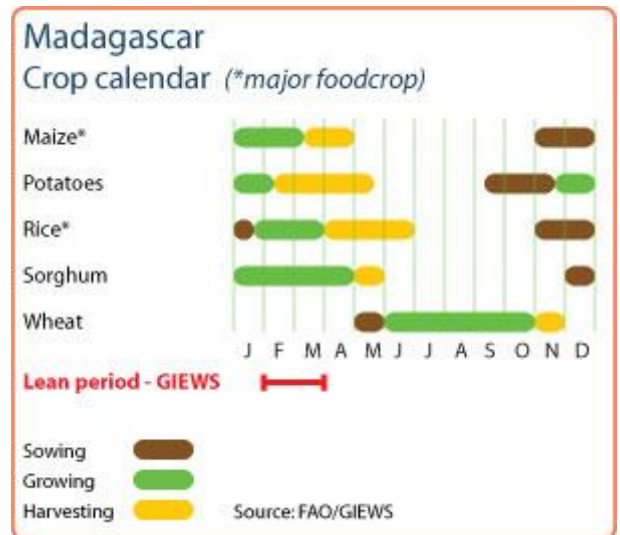
- Rice production in 2017 forecast to fall on an annual basis, mainly reflecting dryness in main-producing areas
- Imports of rice projected to rise in 2017; currency weakness expected to maintain higher rice prices
- Food security conditions remained stressed in southern regions, while impact of Cyclone Enawo increased humanitarian needs

Rice production in 2017 expected below average mostly on account of poor rains in main producing areas

Harvesting of the main season's rice crop is underway and will stretch into July, slightly delayed due to the dryness earlier in the season. Rice production is expected to decline in 2017 and is provisionally forecast at 3.5 million tonnes (2.3 million tonnes, milled basis). The decrease is predominantly on account of reduced rains in the main producing areas of the north. Notably, dryness during the December-February period in Analamanga, Boeny and Alaotra-Mangoro regions, which combined contribute to over 20 percent to the national rice output, is expected to have curbed the area planted, while precipitation shortfalls will likely constrain yields.

Furthermore, the passing of Cyclone Enawo in early March, which traversed the length of the country, is reported to have caused widespread flooding of cropped land particularly in the northeast and east regions of Atsinanana, Analanjirofo and Sava. Although, the heavy rains reduced moisture deficits, crop damage is likely to further negatively weigh on this year's rice output. An assessment to ascertain the agricultural damage and impact on food security has recently been finalized, and will inform on livelihood and agricultural needs.

In southern regions (Atsimo-Andrefana, Androy and Anosy), which were affected by successive drought years, rainfall conditions improved in 2016/17. However, the generally low productive capacities of farming households, due to the impact of consecutive years of reduced harvests, is anticipated to have limited any potential production gains this year. As a result, production of maize, which is mostly grown in southern parts, is expected to remain at a below-average level but slightly above 2016's output.



National import requirement for rice forecast to rise in 2017

Rice imports in 2016 are estimated at about 200 000 tonnes, slightly down on the previous year, reflecting a moderate increase in domestic output in 2016. In 2017, due to the expected fall in national rice production, imports are forecast to rise sharply. However, a weakening of the local currency against the US dollar in recent months may constrain import volumes and also raise prices, which are likely to come under further upward pressure due to the lower domestic output in 2017.

Stressed food security conditions continue in south, while Cyclone Enawo results in large number of displaced persons

Approximately 434 000 people were affected by Cyclone Enawo and are in need of food assistance, of which about 247 000 were displaced due to floods mainly located in the northeast and east. In response to the Cyclone's impact, the Government declared a national situation of emergency and launched an appeal for international assistance. An estimated 170 432 people have been targeted for emergency food assistance, while an additional 46 130 households will receive agricultural inputs.

In southern regions of Androy, Anosy and Atsimo Andrefana, which were severely affected by consecutive years of poor agricultural outputs, about 750 000 people are receiving food assistance. This is expected to continue until June when the new supplies from the 2017 will be available. In addition, farming households have been provided with agricultural inputs to support production in 2017.

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Madagascar

Cereal production

	2012-2016 average	2016	2017 forecast	change 2017/2016
	000 tonnes			percent
Rice (paddy)	3 935	3 815	3 500	-8
Maize	366	316	320	1
Wheat	6	5	5	0
Others	1	1	1	0
Total	4 308	4 137	3 826	-8

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



GIEWS Country Brief Madagascar

Reference Date: 14-November-2016

FOOD SECURITY SNAPSHOT

- Sharp cereal production decreases estimated in southern regions in 2016 due to impact of El Niño-induced drought
- National rice production estimated to have increased marginally in 2016 on yearly basis but still remains below average
- Food security conditions critical in southern regions on account of successive years of reduced crop production and higher prices

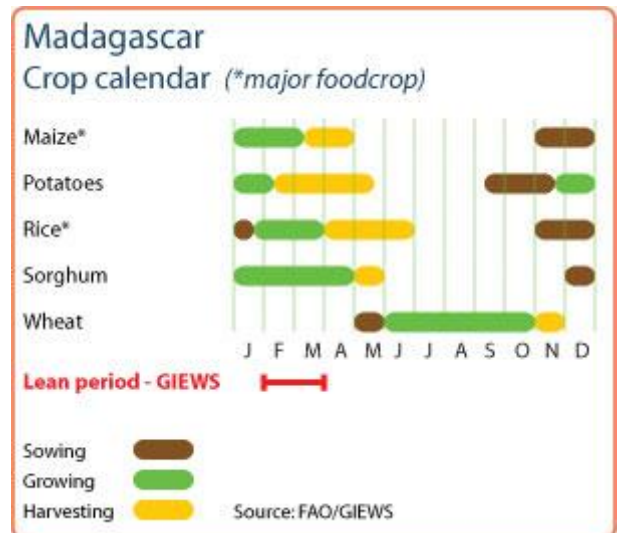
Rice production in 2016 estimated up from 2015 but still remains below average, while sharp production declines registered in south

The 2015/16 cropping season was largely characterized by a significant decline in crop production in southern parts of the country reflecting severe El Niño-induced drought conditions; the impact was particularly pronounced in the regions of Androy, Anosy and Atsimo Andrefana. In the north, the regions of Sofia and Boeny, as well as the district of Maevatanana in Betsiboka Region, were also adversely affected. The poor seasonal rains resulted in an 81 percent decline in maize production in Androy compared to the already reduced level of 2015, while maize production remained well below average in Anosy.

However, in the major rice-producing areas of the country, particularly in the centre and north, good rainfall was received, while the damage caused by locusts was minimal mostly on account of the impact of the three-year anti-locust response programme (2013-2016) implemented jointly by FAO and the Government of Madagascar. Rice production is, therefore, estimated to have increased by about 2 percent but still remains about 5 percent below the five-year average. The national outputs of maize and cassava, which are mainly produced in southern parts, decreased by 4 percent and 2 percent, respectively, from the below-average 2015 outputs. These results were taken from the joint [FAO/WFP Crop and Food Security Assessment Mission \(CFSAM\)](#) report, which was released in October.

National import requirements down slightly

Import requirements in the 2016/17 marketing year (April/March) are estimated at about 272 000 tonnes of rice (milled), 97 000 tonnes of maize and 149 000 tonnes of wheat, a total of about



Madagascar
Cereal production

	2011-2015 average	2015	2016 estimate	change 2016/2015
	000 tonnes			percent
Rice (paddy)	4 032	3 722	3 815	2
Maize	389	329	316	-4
Wheat	7	5	5	0
Others	1	1	1	0
Total	4 429	4 057	4 137	-2

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

518 000 tonnes of cereals, 6 percent down from the estimated requirements in 2015/16. The small drop this year mostly reflects the higher 2016 rice output, while the depreciation of the national currency (Arriary) has pushed up importation costs and negatively impacted on the country's import capacity.

The below-average outputs and weaker currency have put upward pressure on food prices, resulting in higher inflation rates in 2016.

Consecutive seasons of reduced agricultural outputs severely impact food security in south

According to the results from the CFSAM, out of the nine regions covered by the household food security survey, the majority of the households that are classified as severely food insecurity are located in the three drought-affected southern regions (Androy, Anosy and Atsimo Andrefana). The CFSAM estimated that over 1.2 million people are food insecure in Madagascar's three southern regions, of which approximately 617 000 people are categorized as moderately food insecure and almost 600 000 are severely food insecure^{1/}. Although compared to 2015, an overall reduction in the number of food insecure people was estimated, there was an increase in the estimate of severely food insecure persons.

In southeastern coastal regions, the food insecurity situation is characterized by a high number of households in moderate food insecurity compared to previous years, mainly reflecting the deterioration in purchasing power as a result of higher prices and reduced crop production.

^{1/} These figures have been updated by an Integrated Food Security Phase Classification (IPC) Mission that visited the country at the end of September. The Mission's remit was to assess the vulnerability situation in Madagascar's southern regions. The report can be accessed [here](#).



GIEWS Country Brief Madagascar

Reference Date: 12-July-2016

FOOD SECURITY SNAPSHOT

- Rice production in 2016 is provisionally forecast to be at near-average level, but sharp production shortfalls anticipated in the south due to severe El Niño-induced dryness
- Food security conditions remain critical in southern regions on account of successive years of reduced crop production and higher prices

Rice production in 2016 forecast to be close to average levels

Harvesting of the 2016 rice crop is nearing completion. Rainfall during the 2015/16 cropping season (November/July) was mixed across the country and as a result year-on-year regional outputs are expected to vary significantly. Generally satisfactory seasonal rains were received across northern parts and most central regions, while in the south persistent and severe dryness, influenced by the 2015/16 El Niño episode, caused crop failures and is expected to result in well below-average cereal harvests in these areas. Pending the results from the joint FAO/WFP Crop and Food Security Assessment Mission (CFSAM) that is currently underway, 2016 rice production is provisionally forecast to be close to average; however, sharp cereal production shortfalls are anticipated in the south.

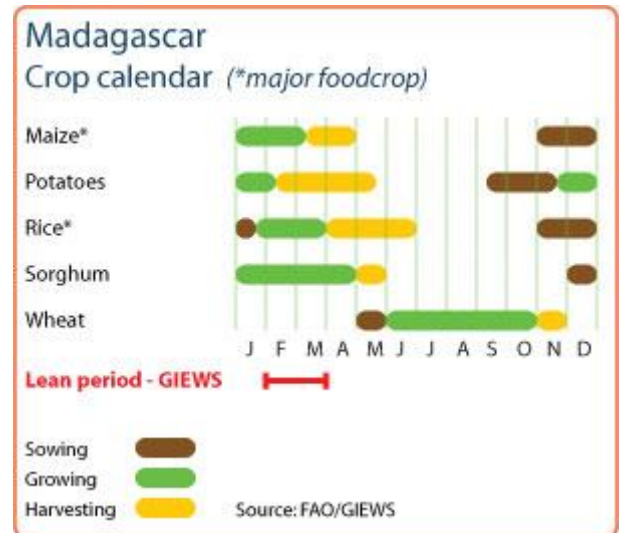
Damage from locusts has been generally minimal during the 2015/16 agricultural campaign, mainly reflecting the impact of the joint FAO/Government of Madagascar three-year anti-locust programme (2013-2016). The operations have significantly reduced the numbers and gregariness of the locust populations as well as the geographical extension of the infestations.

Rice prices slightly up on previous year

Rice prices began to seasonally decline from February 2016, as the early harvest alleviated supply pressure. As of April 2016, the national average rice price of local varieties was slightly above its year earlier value.

Consecutive poor agricultural seasons severely impact food security in the south

Food security conditions in southern regions are critical following four consecutive years of reduced cereal outputs. Tight supplies from households' own production have weakened food availability and access for large proportions of the population,



	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Rice (paddy)	4 032	3 722	3 800	2
Maize	393	350	300	-14
Wheat	7	5	5	0
Others	1	1	1	0
Total	4 433	4 078	4 106	1

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

with the worst-affected regions being Androy and Anosy. Based on a rapid assessment by the Food Security Cluster in March 2016, an estimated 1.14 million people in the south are food insecure, of which 665 000 are severely food insecure. More detailed assessments of the prevailing situation will be available following the completion of the CFSAM.

Reference Date: 16-June-2015

FOOD SECURITY SNAPSHOT

- Rice production in 2015 expected to remain below-average, but increase marginally compared to partially-improved 2014 output
- Food security conditions aggravated in areas affected by cyclones and floods, while dry conditions in southern regions raise concerns over a third successive year of reduced crop production
- An FAO/WFP Crop and Food Security Assessment Mission (CFSAM) is planned to take place in July 2015

Rice production in 2015 forecast at below-average levels

Harvesting of the 2015 rice crop began in late December 2014, with the bulk of crop harvested between April and June 2015. Production is tentatively forecast at a below-average level, reflecting generally erratic rainfall in most of the country and dry conditions in southern regions, but better than the previous two years. Heavy rains at the start of 2015, following passing of Cyclone Chedza, resulted in flooding and consequent crop damage. The most affected regions were Vatovavy Fitovinany and Atsimo Atsinanana, which combined contribute only 5 percent to the national rice output, however, crop losses will negatively impact on local supplies. A rapid crop assessment conducted by FAO in March indicates that the cyclone caused damage to about two-thirds of the paddy area in the most affected districts.

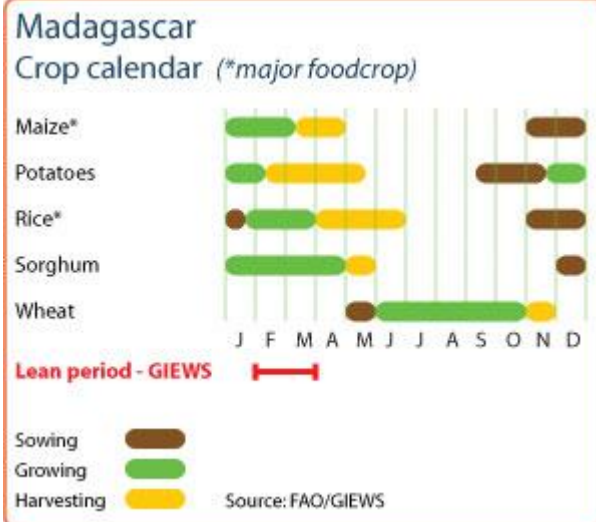
Southern regions, including Androy and Anosy, which recorded two successive years of reduced cereal outputs, suffered from a prolonged dry spell in last quarter of 2014 that severely impacted on crop development and lowered 2015 production expectations. Despite improved rains since the start of the year, cereal production (mainly rice and maize) is foreseen to remain depressed and similar to the low levels of the previous two years.

After two successful years, sufficient funding for the third and final year (2015/16) of the anti-locust campaign is needed to enable the country to enter a locust recession period; funds would be required by the end of June to ensure the successful prepositioning of supplies.

A planned joint FAO/WFP Crop and Food Security Assessment Mission (CFSAM), scheduled to be conducted in July, is expected to provide more details on crop production and the overall food security situation.

Gradual increase in inflation

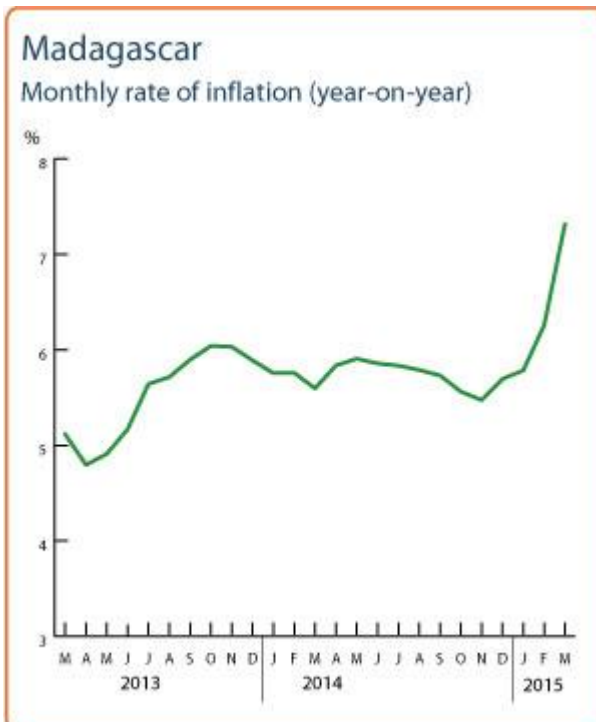
After a generally stable period in 2014, the year-on-year inflation rate rose gradually in the first quarter of 2015, driven partly by increasing food prices and higher transportation costs. However, lower international rice prices have helped to temper rice price gains in the country; imports of rice in the 2014/15 marketing year (April/May) are estimated to have decreased by approximately 25 percent from the high level of the previous year, reflecting the improved 2014 domestic output.



Madagascar Cereal production

	2009-2013 average	2013	2014 estimate	change 2014/2013
	000 tonnes		percent	
Rice (paddy)	4 348	3 611	3 978	10
Maize	406	381	366	-4
Wheat	9	5	5	0
Others	1	1	1	0
Total	4 764	3 998	4 350	9

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



Cyclone damage and dry conditions aggravates food insecurity

Food security conditions are expected to temporarily improve in the current period, as the new 2015 harvest augments households' food supplies. However, in southern regions, with production foreseen to remain close to the low levels of the previous two years, an ensuing tight supply situation is anticipated to have a negative impact on food security in 2015/16. In the southern regions of Atsimo Andrefana and Androy, the 2014 CFSAM had already noted an increased prevalence of food insecurity, reflecting reduced cereal production.

The 2015 floods had affected approximately 517 000 people, of which about 166 000 were assessed to be severely food insecure by FAO's rapid assessment. The crop damage in some districts will result in reduced rice supplies from own production, sufficient for only two months in several districts. Recommendations from the rapid assessment include the provision of food assistance between August and October, while the report also recommends the rehabilitation of agriculture infrastructure and supply of tools and fishing equipment in the affected areas.

Reference Date: 20-March-2015

FOOD SECURITY SNAPSHOT

- **Mixed 2015 crop production prospects due to cyclone damage and extended dry spell in the south**
- **Rice production in 2014 increased to about 4 million tonnes, partly recovering from last year's sharply reduced output**
- **Prices of rice increased seasonally, but remain below their year-earlier levels as of December 2014**
- **Food security conditions aggravated in areas affected by cyclones, while dry conditions in south raise serious concerns over a third successive production decline**

Cyclone Chedza caused localized damage to 2015 cereal crops, while dry conditions negatively impact on crops in south

Harvesting of the first 2015 rice crop began in late December, with the bulk of the main paddy crop to be harvested from April. Current production prospects are mixed, reflecting the impact of heavy rains in western, central and eastern parts, and generally dry condition in southern regions.

In central regions, which produce the bulk of the national rice output (including Vakinankaratra, Itasy and Alaotra Mangoro), the cumulative level of rainfall from the October 2014 to February 2015 period was close to the average despite the below-average levels of precipitation in October and November. However, the passing of Cyclone Chedza in mid-January, which traversed southern areas, brought abundant precipitation across large parts of the country, causing flooding and consequently crop damage. Further heavy rains were recorded in February, causing additional floods in central areas around Antananarivo. Field assessments indicate that close to 40 000 hectares of cropped land was flooded, representing less than 3 percent of the national area to cereals.

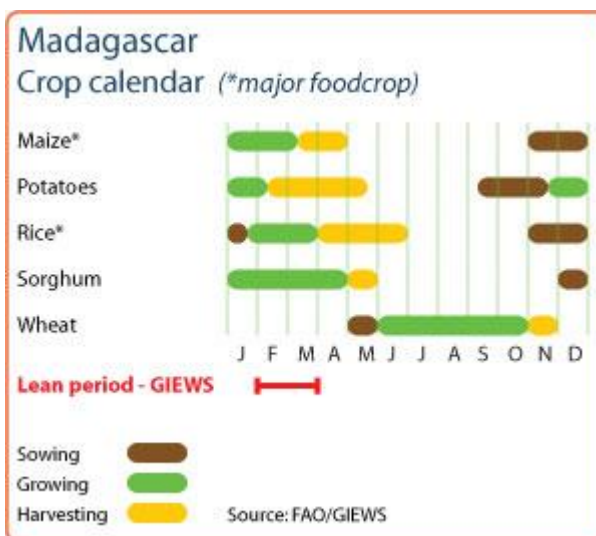
Southern regions, particularly Androy, Anosy and Astsimo-Andrefana, which have recorded two consecutive years of reduced cereal harvests, experienced generally below-average rains since the start of the cropping season in October 2014. However, rains improved somewhat in February, though this is unlikely to fully compensate for previous rainfall deficits. As a result, cereal production is likely to be depressed for a third consecutive year in 2015.

Overall, at the national level, cereal production is likely to remain below-average in 2015.

Insufficient funding for the final third year of the anti-locust campaign is expected to disrupt operations. Any increase in the population of locusts could result in further crop damage and losses in the affected areas.

Partial recovery in 2014 rice crop

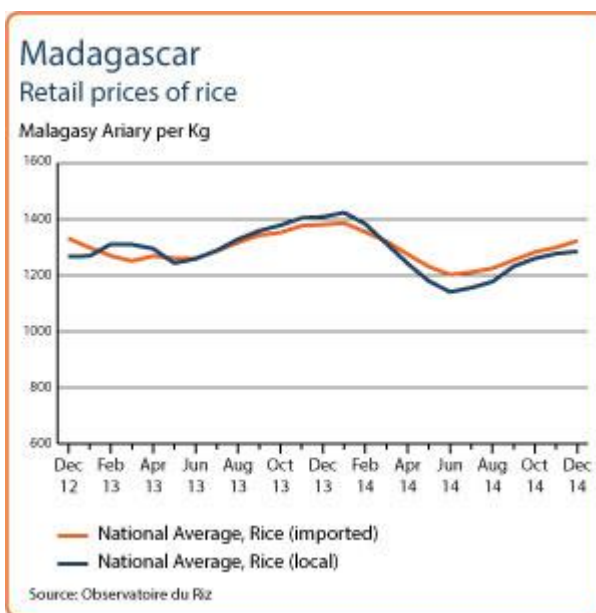
Based on the findings from the joint 2014 FAO/WFP Crop and Food Security Assessment Mission (CFSAM), the 2014 rice output increased by 10 percent to 4 million tonnes. Despite uneven rains in the south and



Madagascar Cereal production

	2009-2013 average	2013	2014 estimate	change 2014/2013
	000 tonnes		percent	
Rice (paddy)	4 348	3 611	3 978	10
Maize	406	381	366	-4
Wheat	9	5	5	0
Others	1	1	1	0
Total	4 764	3 998	4 350	9

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



the impact of locusts, generally favourable weather conditions were observed in the main rice producing regions of the centre and north and, in combination with an estimated increase in the area planted, contributed to the annual production gain. However, the rice output remained 9 percent below the previous five-year average. Maize and cassava production in 2014 were estimated to have decreased, with sharp declines recorded in the southern regions of Atsimo Andrefana, Androy and Anosy. Overall, the national 2014 cereal harvest is put at 4.35 million tonnes, higher than 2013's output but about 9 percent below the previous five-year average.

Rice prices increased seasonally, but remain below their year-earlier values

Rice prices, both local and imported varieties, have been trending upwards since July 2014. Despite these seasonal increases, as of December 2014, prices were still about 9 percent (local) and 4 percent (imported) below their year-earlier values, reflecting both the improved 2014 rice output and adequate volumes of imported rice. In the last quarter of 2014, prices of local rice increased at a slower rate than imported varieties, as traders offloaded stocks and the early rice harvest in December increased market supplies.

Cyclone damage and dry conditions aggravates food insecurity

Assessments following the heavy rains and cyclones indicate that approximately 39 000 people were displaced. Damage to rice crops could result in production shortfalls in affected areas. In southern regions, dry conditions since the beginning of the cropping season have increased concerns over the impact on production, despite some improved precipitation in February. These areas have recorded sharp drops in cereal production in 2013 and 2014, and a third successive production decline would be expected to further aggravate the low levels of food security. In Atsimo Andrefana and Androy, the 2014 CFSAM noted an increased prevalence of food insecurity, reflecting the reduced cereal harvests. Rates of food insecurity in Atsimo Andrefana and Androy were estimated at 74 and 83 percent in 2014, respectively, compared to 39 and 65 percent in the previous year.

The Government, in coordination with UN agencies, is providing emergency assistance to the cyclone-affected populations, while food assistance is being provided to vulnerable households in southern regions affected by the prolonged dry period.

Reference Date: 10-February-2015

FOOD SECURITY SNAPSHOT

- **Mixed 2015 crop production prospects due to cyclone damage and extended dry spell in the south**
- **Rice production in 2014 increased to about 4 million tonnes, partly recovering from last year's sharply reduced output**
- **Prices of rice increased seasonally, but remain below their year-earlier levels as of December 2014**
- **Food security conditions aggravated in areas affected by cyclones, while dry conditions in south raise serious concerns over a third successive production decline**

Cyclone Chedza caused localized damage to 2015 cereal crops, while dry conditions negatively impact on crops in south

Harvesting of the first 2015 rice crop began in late December, with the bulk of the main paddy crop to be harvested from April. Current production prospects are mixed, reflecting the impact of heavy rains in western, central and eastern parts as a result of cyclone Chedza, and dry condition in southern regions.

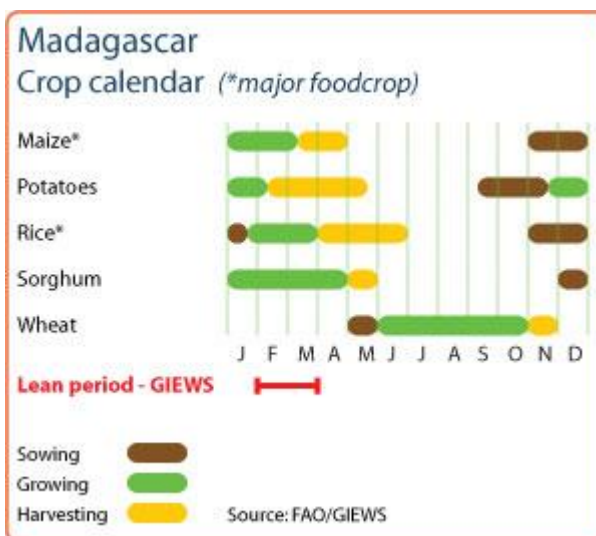
In central regions, which produce the bulk of the national rice output (including Vakinankaratra, Itasy and Alaotra Mangoro), following a period of below-average precipitation in October and November, rainfall levels increased in subsequent months with cumulative levels for the October 2014-January 2015 period close to the average. However, the passing of cyclone Chedza in mid-January, which traversed southern areas, brought abundant precipitation across large parts of the country, causing flooding and consequently crop damage. Assessments are still underway to determine the extent of the damage on the agriculture sector, with preliminary estimates indicating approximately 24 000 hectares of flooded paddy fields, representing less than 2 percent of the national paddy area. Heavy downpours are expected in some areas until mid-February.

Southern regions, particularly Androy, Anosy and Astsimo-Andrefana, which have recorded two consecutive years of reduced cereal harvests, experienced generally below-average rains since the start of the cropping season in October 2014. This has raised concerns about the prospects of a third consecutive depressed cereal output in 2015.

Insufficient funding for the final third year of the anti-locust campaign is expected to disrupt operations. Any increase in the population of locusts could result in further crop damage and losses in the affected areas.

Partial recovery in 2014 rice crop

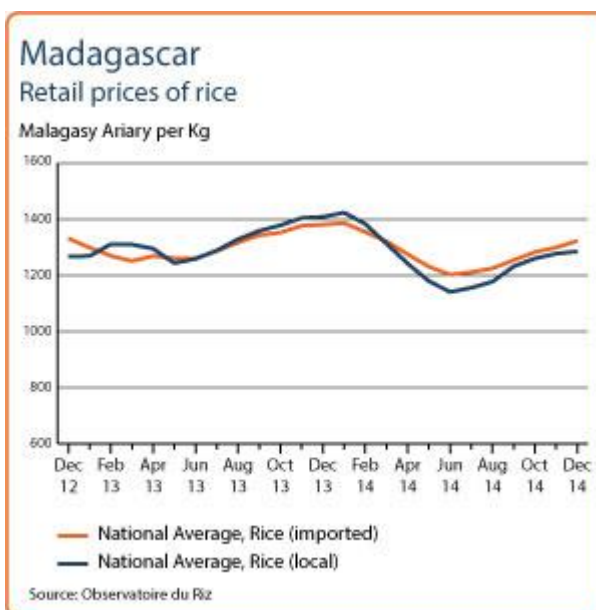
Based on the findings from the joint 2014 FAO/WFP Crop and Food Security Assessment Mission (CFSAM), the 2014 rice output increased by 10 percent to 4 million tonnes. Despite uneven rains in the south and the impact of locusts, generally favourable weather conditions were observed in the main rice producing regions of the centre and north and, in combination with an estimated increase in the area planted, contributed to the annual production gain. However, the rice output



Madagascar Cereal production

	2009-2013 average	2013	2014 estimate	change 2014/2013
	000 tonnes		percent	
Rice (paddy)	4 348	3 611	3 978	10
Maize	406	381	366	-4
Wheat	9	5	5	0
Others	1	1	1	0
Total	4 764	3 998	4 350	9

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



remained 9 percent below the previous five-year average. Maize and cassava production in 2014 were estimated to have decreased, with sharp declines recorded in the southern regions of Atsimo Andrefana, Androy and Anosy. Overall, the national 2014 cereal harvest is put at 4.35 million tonnes, higher than 2013's output but about 9 percent below the previous five-year average.

Rice prices increased seasonally, but remain below their year-earlier values

Rice prices, both local and imported varieties, have been trending upwards since July 2014. Despite these seasonal increases, as of December 2014, prices were still about 9 percent (local) and 4 percent (imported) below their year-earlier values, reflecting both the improved 2014 rice output and adequate volumes of imported rice. In the last quarter of 2014, prices of local rice increased at a slower rate than imported varieties, as traders offloaded stocks and the early rice harvest in December increased market supplies.

Cyclone damage and dry conditions aggravates food insecurity

Results from preliminary assessments indicate that approximately 21 000 people have been displaced, and nearly 174 000 affected as a result of cyclone Chedza. Damage to rice crops could result in production shortfalls in affected areas; however, assessments are needed to determine the extent to crop damage and losses. In southern regions, dry conditions since the beginning of the cropping season in October 2014 have increased concerns over the impact on production. These areas have recorded sharp drops in cereal production in 2013 and 2014, and a third successive production decline would be expected to further aggravate the low levels of food security. In Atsimo Andrefana and Androy, the 2014 CFSAM noted an increased prevalence of food insecurity, reflecting the reduced cereal harvests. Rates of food insecurity in Atsimo Andrefana and Androy were estimated at 74 and 83 percent in 2014, respectively, compared to 39 and 65 percent in the previous year.

The Government, in coordination with UN agencies, is providing emergency assistance to the cyclone-affected populations.

Reference Date: 04-November-2014

FOOD SECURITY SNAPSHOT

- Planting of 2014/15 rice crop is underway
- Rice production in 2014 increased to 4 million tonnes, partly recovering from last year's sharply reduced output
- Prices of rice in October were below their year-earlier levels
- Food security conditions improved in central and northern regions, but a second year of poor cereal outputs aggravated conditions in southern regions

Land preparation and planting of 2015 crop are underway

Land preparation and planting of the early maturing 2015 rice crops, to be harvested in December-January, are underway. Overall, forecasts for the October 2014-March 2015 period point to a higher probability of normal to above-normal rains, indicating a generally positive outlook for the main rice 2015 crop, which is expected to be harvested between April and June.

Rice production recovered in 2014

According to the joint 2014 FAO/WFP Crop and Food Security Assessment Mission (CFSAM) report, released in October, the 2014 rice output increased by 10 percent to 4 million tonnes. Despite uneven rains in southern regions and the impact of the locust plague, generally favourable weather conditions were observed in the main rice producing regions of the centre and north, and in combination with an estimated increase in the area planted, contributed to the annual production gain. However, the rice output still remains 9 percent below the previous five-year average. Maize and cassava production in 2014 was estimated to have decreased, with sharp declines recorded in the southern regions of Atsimo Andrefana, Androy and Anosy.

The joint Government/FAO anti-locust campaign, which commenced in November 2013, treated more than 1.2 million hectares through both aerial and ground operations. These operations prevented an expansion of the plague and reduced the impact on cereal crops in 2014.

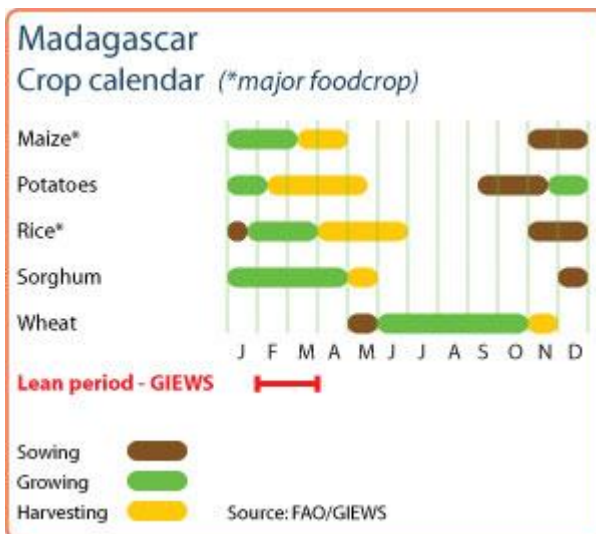
Overall, the national 2014 cereal harvest is put at 4.35 million tonnes, higher than 2013's output but about 9 percent below the previous five-year average.

Reduced rice imports forecast in 2014/15

Given the low domestic output in 2013, a substantial volume of rice was imported in the 2013/14 marketing year (April/March), estimated at about 540 000 tonnes, more than twice the level of the previous year. In 2014/15, import requirements are forecast to decline to approximately 250 000 tonnes, reflecting the larger domestic harvest in 2014.

Rice prices increased seasonally, but remained below 2013 levels

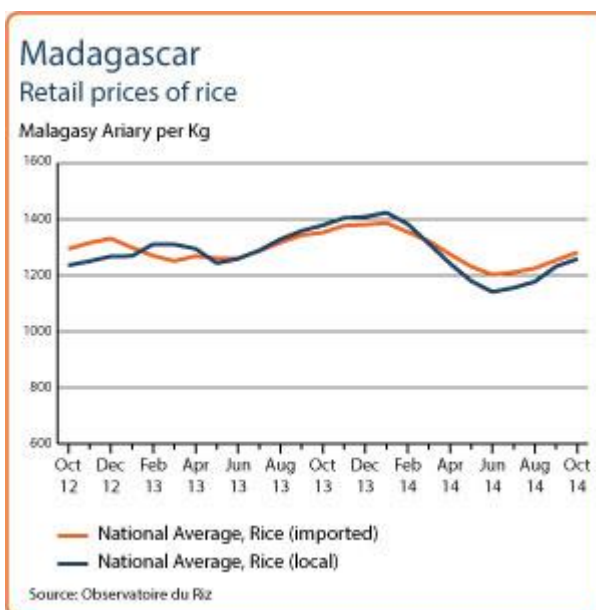
After decreasing between February and June 2014, rice prices increased seasonally. At MGA 1 259 per kg in October 2014, the average price of



Madagascar Cereal production

	2009-2013 average	2013	2014 estimate	change 2014/2013
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Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



domestic varieties is about 9 percent below their year-earlier levels, reflecting improved rice supplies in 2014. Similarly, the average price of imported rice, which has been comparatively more stable, is 5 percent below its level of October 2013.

Increased prevalence of food insecurity in southern regions

In southern regions, particularly Atsimo Andrefana and Androy, the prevalence of food insecurity increased in 2014, reflecting a second year of reduced cereal outputs in these areas. The 2014 CFSAM estimated the rates of food insecurity in Atsimo Andrefana and Androy at 74 and 83 percent, respectively, compared to 39 and 65 percent in the previous year. Households in these regions are expected to face a difficult lean season (October-March). The factor that poses the biggest risk is a rise in food prices, given households' low purchasing power and the fact that a large proportion of their budgets are allocated to food purchases; over two-thirds of the surveyed households spent 75 percent of their budget on food. In central and northern regions, however, where rice production gains were observed, food security conditions improved. Based on the CFSAM survey results, the overall rate of food insecurity (moderate and severe) is estimated at about 36 percent.

Reference Date: 12-June-2014

FOOD SECURITY SNAPSHOT

- Average rice production outlook for the 2014 crop
- Rice prices decrease in the second quarter of 2014 and remain close to their year-earlier values
- Food security conditions are expected to improve this year compared to last year

Rice production in 2014 expected to recover

The 2014 rice output, being harvested, is anticipated to increase above the locust and weather-depressed harvest of 2013. Climatic conditions have generally been favourable during the current cropping season (November-May) with minimal cyclone impact. However, some dryness and water deficits in southern and southwestern areas are likely to affect the maize crop.

The joint Government/FAO anti-locust campaign, which commenced in 2013, prevented significant damage on the paddy crop. However, damage to crops is still expected in the densely-infested areas. In total, nearly 1 million hectares have been treated with chemical pesticides, bio-pesticides and insect growth regulators. The first phase of the anti-locust campaign is expected to run until August this year.

Overall, the rice output is provisionally forecast at about 4.3 million tonnes, close to the short-term average. The forthcoming June/July 2014 joint FAO/WFP Crop and Food Security Assessment Mission (CFSAM), in collaboration with the Government, will provide a more detailed assessment on national production.

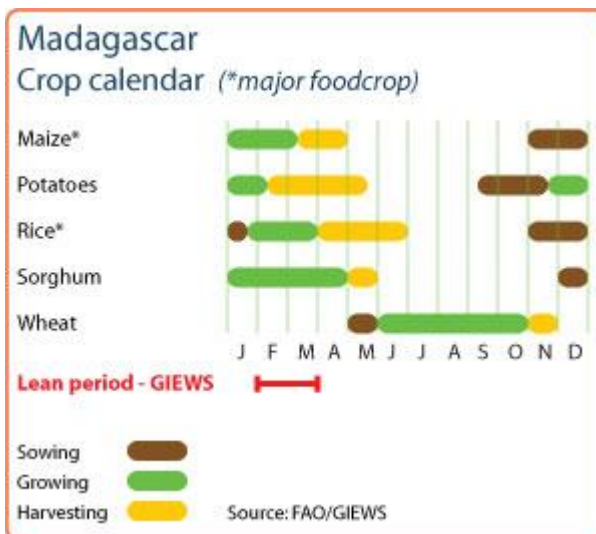
Large volumes of rice imported following reduced 2013 harvest

Substantial volumes of rice were imported in 2013 and the first quarter of 2014, to bridge the larger supply gap following the sharp reduction in the domestic output last year. Approximately 400 000 tonnes were imported in the 2013 calendar year, twice the level recorded in 2012, while already, imports have been estimated at close to 200 000 tonnes in the first quarter of 2014. However, with production expected to recover this year, the import pace is anticipated to ease in the coming months.

Rice prices declined from their peaks earlier in 2014

Following a peak in February 2014, prices of imported and domestic rice have been on a downward trend until early June. The reduced domestic output last year put strong upward pressure on prices in 2013 contributing to their elevated levels at the start of the year. However, substantial volumes of rice imports helped stabilize national supplies and partly mitigated the impact of the low harvest, lessening further pressure on prices. At MGA 1 208 (imported) and MGA 1 156 (domestic) per kg, rice prices at the start of June were slightly below their year-earlier levels. By contrast, cassava prices have increased this year as production shortfalls caused tighter market supplies, applying strong upward price pressure.

Food security conditions expected to improve in



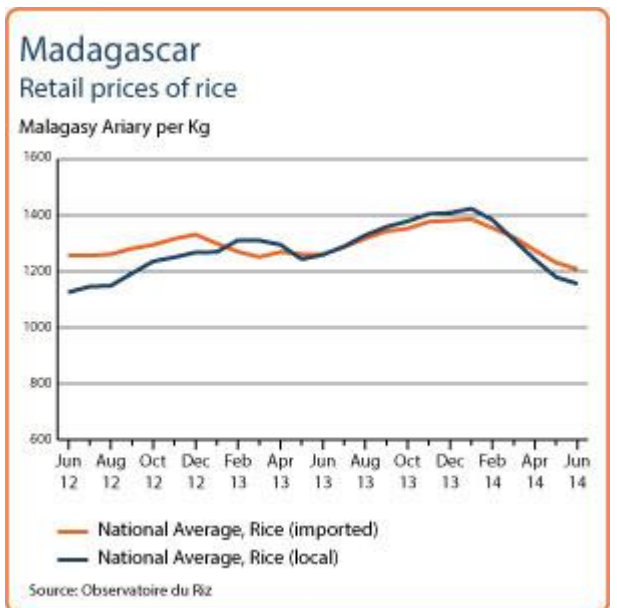
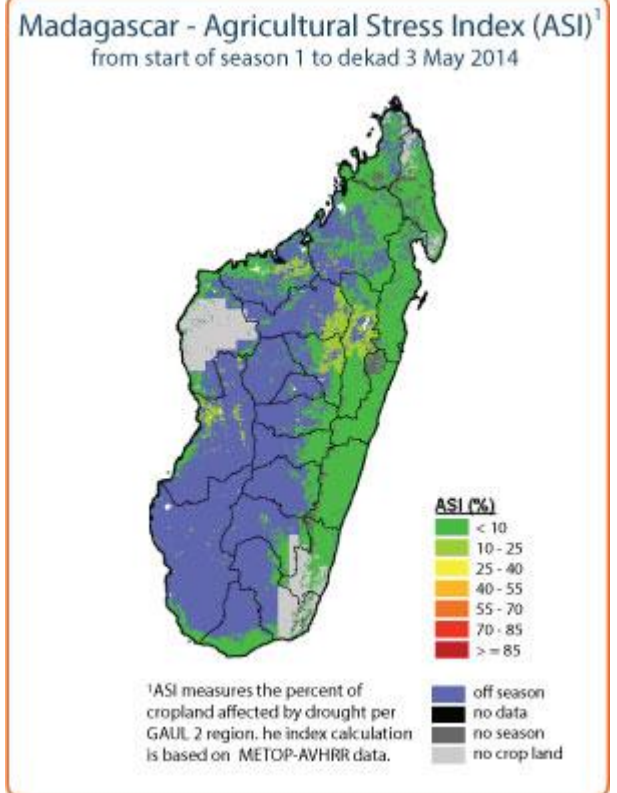
Madagascar
Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes		percent	
Rice (paddy)	4 348	3 611	4 300	19
Maize	413	455	400	-12
Wheat	10	10	10	0
Others	1	1	1	0
Total	4 772	4 077	4 711	16

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

2014

As a result of the reduced domestic cereal output last year, food security deteriorated and was further compounded by rising food prices and the impact of the cyclones. Based on the results from the 2013 CFSAM, approximately 28 percent of rural households suffered from food insecurity, translating into about 4 million people in the 20 surveyed regions (excluding Diana and Sava). Conditions are expected to recover in most regions from May onwards, as food availability (new supplies from the 2014 harvest) and access (decreasing rice prices) improves. However, the expected poor production in some southern parts is likely to result in a continuation of a tight food security situation while an estimated 14 000 households require food assistance following the impact of cyclone Hellen in March/April 2014.



Reference Date: 20-May-2014

FOOD SECURITY SNAPSHOT

- Average rice production outlook for the 2014 crop
- Rice prices decrease in the second quarter of 2014 and remain close to their year-earlier values
- Food security conditions are expected to improve this year compared to last year

Rice production in 2014 expected to recover

The 2014 rice output, being harvested, is anticipated to increase above the locust and weather-depressed output of 2013. Climatic conditions have generally been favourable during the current cropping season (November-May) with minimal cyclone impact. However, some dryness and water deficits in southern and southwestern areas are likely to affect the maize crop.

The joint Government/FAO anti-locust campaign, which commenced in 2013, prevented significant damage on the paddy crop. However, damage to crops is still expected in the densely-infested areas. In total, nearly 1 million hectares have been treated with chemical pesticides, bio-pesticides and insect growth regulators. The first phase of the anti-locust campaign is expected to run until August this year.

Overall, the rice output is forecast at about 4.3 million tonnes, close to the short-term average.

Large volumes of rice imported following reduced 2013 harvest

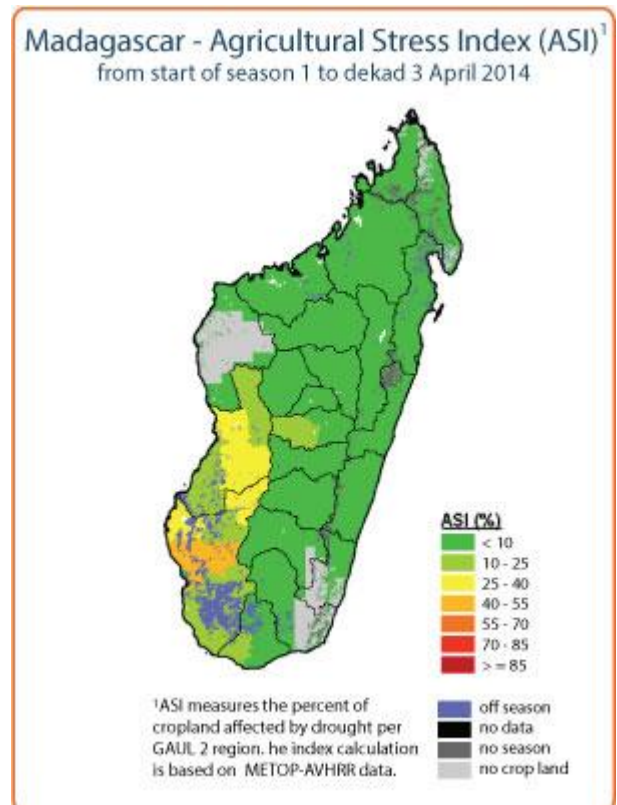
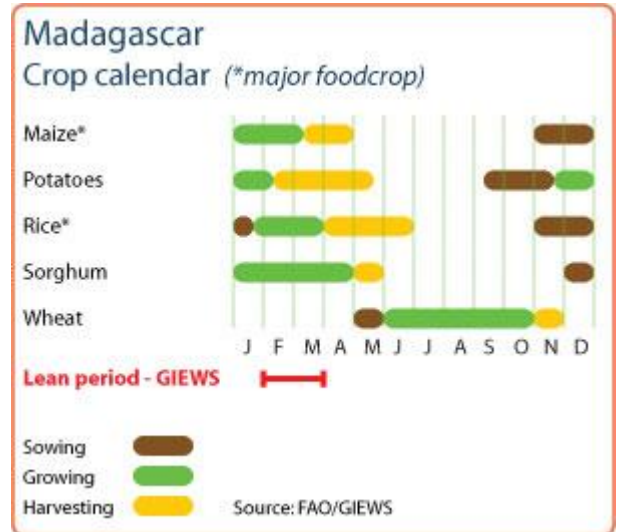
Substantial volumes of rice were imported in 2013 and the first quarter of 2014, to bridge the larger supply gap following the sharp reduction in the domestic output last year. Approximately 400 000 tonnes were imported in the 2013 calendar year, twice the level recorded in 2012, while already, imports have been estimated at close to 200 000 tonnes in the first quarter of 2014. However, with production expected to recover this year, the import pace is anticipated to ease in the coming months.

Rice prices decline from their peaks earlier in 2014

Following a peak in February 2014, prices of imported and domestic rice have been on a downward trend until May. The reduced domestic output last year put strong upward pressure on prices in 2013 contributing to their elevated levels at the start of the year. However, substantial volumes of rice imports helped stabilize national supplies and partly mitigated the impact of the low harvest, lessening further pressure on prices. At MGA 1 240 (imported) and MGA 1 197 (domestic) per kg, rice prices at the start of May were slightly below their year-earlier levels. By contrast, cassava prices have increased this year as production shortfalls caused tighter market supplies, applying strong upward price pressure.

Food security conditions expected to improve in 2014

As a result of the reduced domestic cereal output last year, food security deteriorated and was further compounded by rising food prices and the



impact of the cyclones. Based on the results from the 2013 Crop and Food Security Assessment Mission, approximately 28 percent of rural households suffered from food insecurity, translating into about 4 million people in the 20 surveyed regions (excluding Diana and Sava). Conditions are expected to recover in most regions from May onwards, as food availability (new supplies from the 2014 harvest) and access (decreasing rice prices) improves. However, the expected poor production in some southern parts is likely to result in a continuation of a tight food security situation while an estimated 14 000 households require food assistance following the impact of cyclone Hellen in March/April 2014.

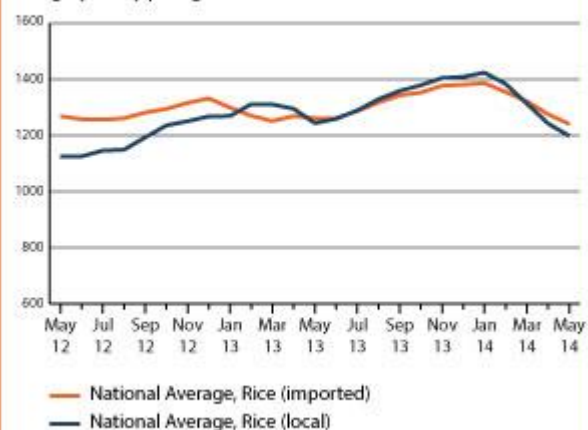
Madagascar Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes			percent
Rice (paddy)	4 348	3 611	4 300	19
Maize	413	455	400	-12
Wheat	10	10	10	0
Others	1	1	1	0
Total	4 772	4 077	4 711	16

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

Madagascar Retail prices of rice

Malagasy Ariary per Kg



Source: Observatoire du Riz

Reference Date: 11-February-2014

FOOD SECURITY SNAPSHOT

- Average production prospects for 2014 rice crop
- Sharp drop in 2013 rice production compared to the above average harvest of the previous year
- Rice prices strengthen in January 2014 and remain above levels of 2013
- Lower domestic supplies, higher rice prices and climatic shocks combined to deteriorate food security conditions

Harvesting of the minor first season rice crop completed

While harvesting of the main rice crop is expected to commence in April, the minor first season rice crop was harvested in December and January in northern parts. Rains during the 2013/14 cropping season (October-June) have been generally satisfactory, with some deficits recorded in the southwest in December. However, abundant rains in January revived cumulative rainfall levels, limiting the potential negative impact on crop productivity. Given the current conditions, an average rice crop in 2014 is foreseen.

The joint Government-FAO campaign against the Malagasy migratory locusts began in November 2013, with the first phase expected to run until August this year. Approximately 20 million hectares have been surveyed and more than 68 000 hectares treated or protected with pesticides and insect growth regulators. The implementation of anti-locust campaign is expected to significantly limit the impact of locusts on rice production.

Significant reduction in 2013 rice production

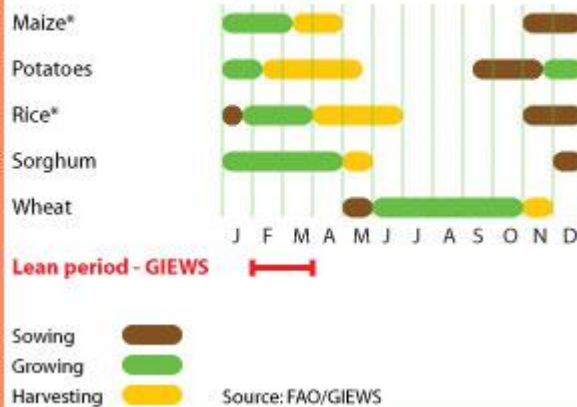
A joint FAO/WFP Crop and Food Security Assessment Mission (CFSAM), conducted in July, estimated the 2013 national rice output at 3.6 million tonnes (2.4 million tonnes in milled terms). At this level, the rice harvest is estimated to have declined by 21 and 18 percent compared to the above average harvest of 2012 and the previous five-year average, respectively. Similarly, production of maize and cassava decreased by 14 percent compared to the outputs of 2012. Erratic weather conditions and a reduction in plantings were the main cause of the lower cereal output.

Rice prices strengthen in 2013, reflecting tighter supplies

Overall, rice prices were above their year earlier levels at the start of 2014, reflecting the lower 2013 domestic harvest and consequently tighter national supplies. At MGA 1 387 per kg, the national average price of local rice increased by 12 percent in January 2014 from their year earlier levels. At the regional level, some decreases were observed, instigated by new supplies from the first season's harvest; however, heavy rains also disrupted the drying of paddy crops and access to some markets, causing price increases. Imported rice prices, although they posted a 7 percent annual gain in January, have not increased as quickly as local varieties, benefiting from stable or declining international prices.

Madagascar

Crop calendar (*major foodcrop)



Madagascar

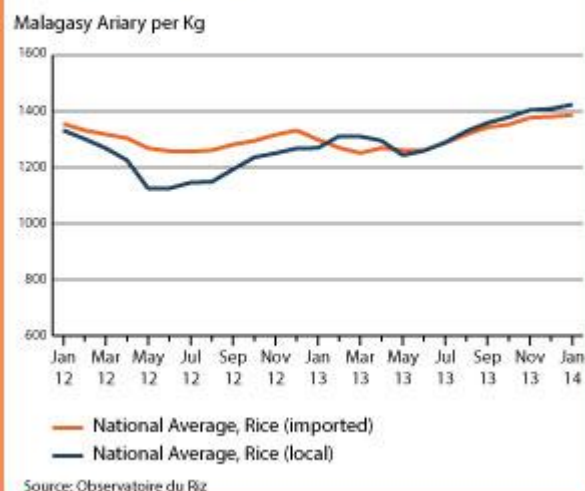
Cereal production

	2008-2012 average	2012	2013 estimate	change 2013/2012
	000 tonnes		percent	
Rice (paddy)	4 409	4 551	3 611	-21
Maize	409	400	455	14
Wheat	10	10	10	0
Others	1	1	1	0
Total	4 829	4 962	4 077	-18

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

Madagascar

Retail prices of rice



Food security conditions deteriorate in 2013/14

The reduced domestic rice harvest, rising food prices, the impact of the cyclones and the locust plague resulted in increased food insecurity in 2013/14. Based on the results from the CFSAM, approximately 28 percent of rural households suffer from food insecurity, translating into about four million people in the 20 surveyed regions (excluding Diana and Sava). Severe food insecurity is quite significant in the southern regions (Androy, Atsimo Atsinanana and Atsimo Andrefana), in the regions of the southern plateau (including Hirambe) and in the food basket region of Alaotra Mangoro.

Reference Date: 21-October-2013

FOOD SECURITY SNAPSHOT

- Sharp drop in rice production in 2013 compared to the above average harvest of the previous year
- Rice prices strengthen in 2013 and remain above the levels of 2012
- Lower domestic supplies, higher rice prices and climatic shocks combined to deteriorate food security conditions

Below average rice production estimated in 2013

A joint FAO/WFP Crop and Food Security Assessment Mission (CFSAM), conducted in July, estimates national rice production in 2013 at 3.6 million tonnes (2.4 million tonnes in milled terms). At this level, the national rice harvest is estimated to have declined by 21 and 18 percent compared to the above average harvest of 2012 and the previous five-year average, respectively. Similarly, production of maize and cassava decreased by 15 and 14 percent respectively compared to the outputs of last year.

The 2012/13 cropping season (November-June) was characterized by erratic weather conditions, with a slight delay to the start of seasonal rains, followed by a prolonged dry spell in December and January. The cyclone season (October-April) brought heavy rains with the arrival of cyclones Felleng and Haruna in January and February 2013, causing floods and crop damage in the north-east and south-western areas. The locust plague further contributed to a decrease in production, particularly in the south-west, both through damage to vegetation and with many farmers citing the potential destruction of crops as a reason that limited their plantings. However, the south-western regions contribute only to a small proportion of the national rice output, and therefore the impact of the locust plague at the national level has been more limited.

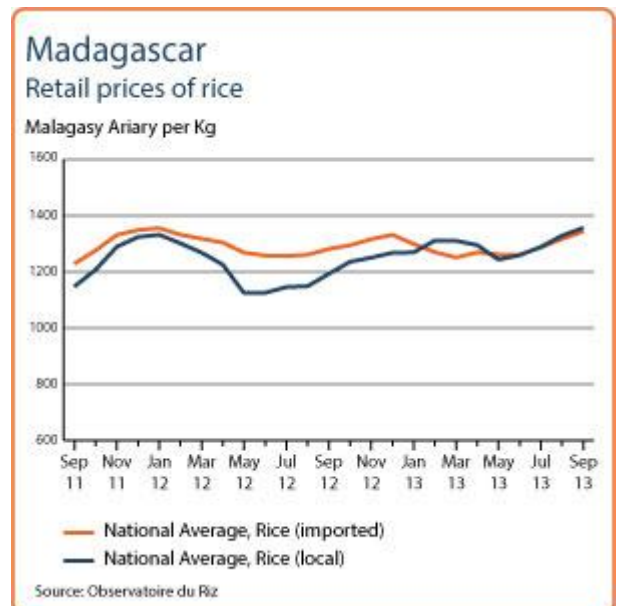
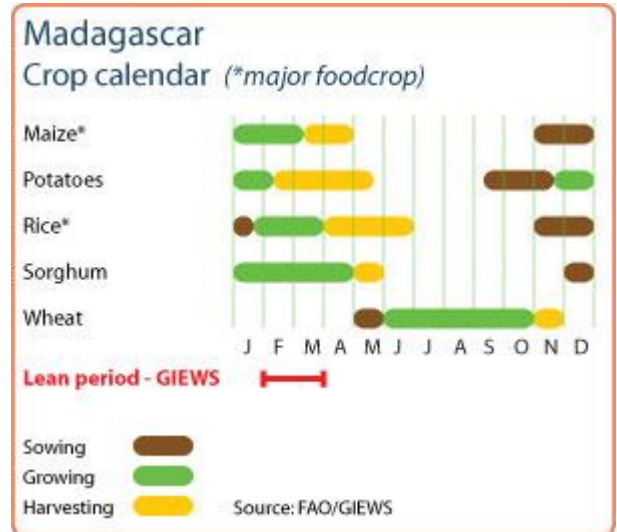
A locust campaign was launched in September, and spraying is expected to begin in late October, prior to the start of the main planting period that is expected to commence in November.

Commercial imports expected to satisfy the bulk of the national deficit in 2013/14

Given 2013's domestic rice harvest, the country is left with a national deficit (in milled terms) of about 240 000 tonnes in the 2013/14 marketing year (April/March). The bulk of the deficit is expected to be covered by commercial imports, with favourable international supplies and decreasing prices creating conducive conditions for imports.

Rice prices strengthen in 2013, reflecting tighter supplies

Reflecting the lower domestic harvest and consequently tighter national supplies, prices of local rice were 14 percent higher in September 2013, compared to levels of one year earlier. Unlike previous years, local rice prices did not experience a strong seasonal decline following the start of the first harvests in February and consequently prices are likely to continue to remain above the levels of 2012 during the remainder of 2013 and beginning of 2014.



Similarly, imported rice prices are also higher, albeit by a smaller proportion (+5 percent). Prices of imported rice however, have remained relatively stable compared to prices of local varieties during 2013, on account of generally stable exchange rate and export prices from main suppliers of the country. The higher rice prices are expected to have a significant negative impact on households' purchasing power, with up to 75 percent of a households' budget allocated to food purchases.

Food security conditions deteriorate in 2013

The decline in national rice production, rising food prices, the impact of the cyclones and the locust plague resulted in increased food insecurity. Based on the results from the CFSAM, approximately 28 percent of rural households suffer from food insecurity, translating into about four million people in the 20 surveyed regions (excluding Diana and Sava). Severe food insecurity is quite significant in the southern regions (Androy, Atsimo Atsinanana and Atsimo Andrefana), in the regions of the southern plateau (including Hirambe) and in the food basket region of Alaotra Mangoro.

Reference Date: 28-March-2013

FOOD SECURITY SNAPSHOT

- Locust plague present in half the country
- Mixed rainfall performance recorded in the 2012/13 cropping season (October-June)
- Rice prices remain comparatively stable during 2012 and into the beginning of 2013

Locust plague threatens crop production and food security

An outbreak of locust in the south in 2012 led the Government to declare an emergency in November. In the following months the locust plague spread further north and is now estimated to have infested half of the country. In total, 13 out of the 22 regions in southwestern and western parts are or are expected to be infested by the end of the current rainy season in June. FAO forecasts that in the absence of a locust campaign 1.5 million hectares of land in two thirds of the country could be infested by September 2013.

The locusts are expected to have negatively impacted on crops and pasture land. While the early harvested crops in central and northern regions are likely to have experienced comparatively minimal damage, the impact on crops (rice and maize) in southern areas, for harvest from April onwards, is likely to have been more severe. In addition, pasture availability will be adversely affected, with negative implications for livestock health and productivity. However, detailed information on the impact to crops and pasture will only be available following a field assessment expected to commence in the next months. FAO and the Ministry of Agriculture have jointly prepared a three year programme, estimated at a cost of about USD 41 million, to combat the plague.

Uneven distribution of rains during 2012/13 cropping season

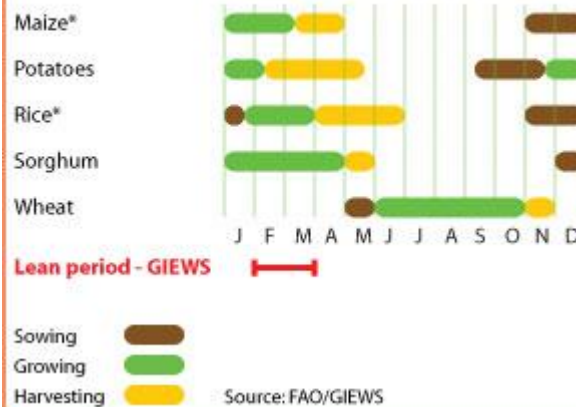
Planting of the main 2012/13 rice crop, for harvest from April, was finalised in January, while harvesting of the early planted varieties commenced in December.

Good rains, both temporarily and spatially, were received during the first two months (October-November) of the 2012/13 cropping season, benefiting planting activities. However, erratic rains were recorded in the following months, with below average precipitation observed in December and January, particularly in the interior parts of the country. In January and February the passing of cyclones Felleng and Hurana brought heavy rains to eastern and southern areas, flooding an estimated 14 000 hectares of cropped fields in the southwestern districts of Morombe and Toliara. The heavy rains however, also relieved areas that had experienced moisture deficits in the preceding months, supporting late plantings and early crop development. Production prospects still remain uncertain, on account of the erratic rains and locust infestation.

Prices remain at similar levels of 2012

Prices of rice were comparatively stable during 2012, with variations in regional supplies mainly accounting for price differences and fluctuations.

Madagascar Crop calendar (*major foodcrop)

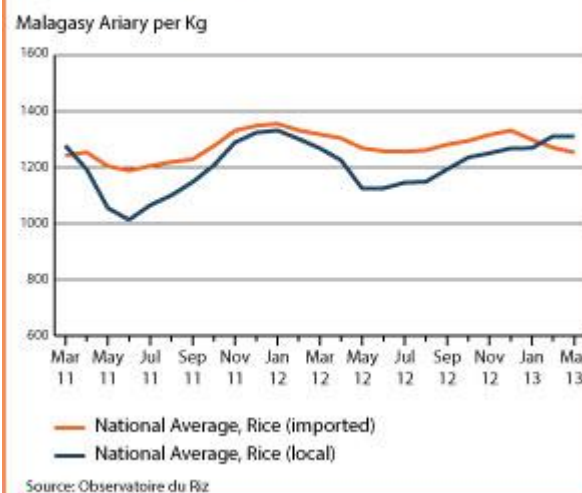


Madagascar Cereal production

	2007-2011 average	2011	2012 estimate	change 2012/2011
	000 tonnes		percent	
Rice (paddy)	4,222	4,300	4,000	-7
Maize	410	430	400	-7
Wheat	10	10	10	0
Others	1	1	1	0
Total	4,643	4,741	4,411	-7

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

Madagascar Retail prices of rice



Destocking activities by traders and new supplies from the early harvests combined to stabilise prices at the end of 2012 and push prices down during the beginning of 2013. However, heavy rains due to the passing of cyclone Felleng and Hurana disrupted supply routes instigating price increases in some of the more remote markets. Overall, national average prices in March 2013 are comparable to those of a year earlier.

Rate of imports slowed towards the end of 2012

At the beginning of 2012 large quantities of rice were imported, averaging approximately 32 000 tonnes a month between January and March. The appreciation of the Malagasy Ariary, in addition to a stable and declining trend in international rice prices at the start of 2012, provided favourable import conditions. Between April and November however, imports declined to only about 9 000 tonnes per month, coinciding with the start of the main domestic rice harvest and a depreciation of the Ariary, making imports less attractive. In total, about 171 000 tonnes of rice were imported between January and November 2012.

Food security conditions aggravated by cyclone and locust plague

Approximately 42 000 households were affected by cyclone Hurana, while Felleng's impact was more limited. Food aid is being distributed in the affected southern districts of Toliara I and II, Morombe and Sakaraha, targeting just under 50 000 persons. The possibility of further flood damage remains until the end of the cyclone season in April 2013. Food security conditions are expected to worsen further as a result of the locust plague, which could lower production and limit food availability for the subsequent 2013/14 marketing year (April/March). An estimated 13 million persons are potentially at risk.

Reference Date: 12-February-2013

FOOD SECURITY SNAPSHOT

- Mixed rainfall performance recorded in the 2012/13 cropping season (October-June)
- Outbreak of locusts in southern areas led the Government to declare an emergency
- Rice prices remain comparatively stable during 2012 and into the start of 2013

Uneven distribution of rains during 2012/13 cropping season

Planting of the main 2012/13 rice crop, for harvest from April, was finalised in January, while harvesting of the early planted varieties commenced in December.

Good rains, both temporarily and spatially, were received during the first two months (October-November) of the 2012/13 cropping season, benefiting planting activities. However, erratic rains have been recorded in the following months, with below average precipitation observed in December and January, particularly in the interior parts of the country. In late January/early February the passing of cyclone Felleng brought heavy rains to eastern areas, but only inflicted limited damage to the agriculture sector. The heavy rains however, relieved areas that had experienced moisture deficits in the preceding months, supporting late plantings and early crop development. Early prospects still remain uncertain, and good rains are required during the remainder of the cropping season to achieve average yields.

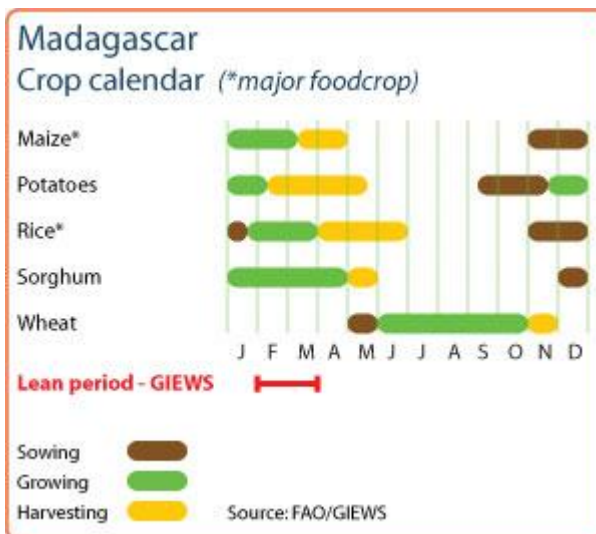
An outbreak of locusts in southern and western parts in late 2012 led the Government to declare an emergency. In response, a three-year anti-locust campaign was developed and an initial 1 million hectares will be treated to control the spread.

Prices remain at similar levels to 2011

Prices of rice were comparatively stable during 2012, with variations in regional supplies mainly accounting for price differences and fluctuations. Destocking activities by traders and new supplies from the early harvests combined to stabilise prices at the end of 2012 and start of 2013. However, heavy rains due to the passing of cyclone Felleng disrupted supply routes instigating price increases in some of the more remote markets, notably in the north and east. Overall, national average prices in January 2013 are marginally below those of a year earlier.

Rate of imports slowed towards the end of 2012

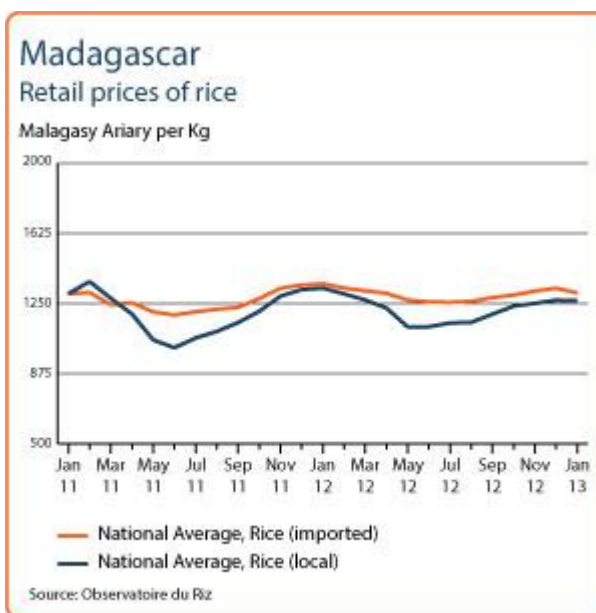
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Others	1	1	1	0
Total	4,643	4,741	4,411	-7

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



Food security conditions aggravated by cyclone

Although cyclone Felleng's impact was limited, including the displacement of 1 303 persons who have since returned to their dwellings, the possibility of further flood damage remains until the end of the cyclone season in April 2013. An estimated 84 000 households (approximately 502 000 people) were assessed to be food insecure as a result of the cyclones in 2012, which caused damage to cash and food crops, as well as households' food stocks. In the southern region, which is prone to periods of dry weather and consequently unstable crop production, a recent WFP assessment in October 2012 estimated that 71 percent of households had poor food consumption scores, a significantly higher rate than other areas of the country, and indicating poor food insecurity conditions in these areas.

Reference Date: 11-July-2012

FOOD SECURITY SNAPSHOT

- Rice production provisionally estimated to decline in 2012 following damage from adverse weather
- An estimated 84 000 households currently facing severe food insecurity

Estimated decline in rice production following cyclone damage

Harvesting of the main rice crop is expected to almost complete. Following a period of dry weather at the start of the cropping season (October-December) that resulted in moisture deficits in far northern and western regions, a series of cyclones brought torrential rains and strong winds during the first quarter of 2012, causing loss of lives, damage to crops and infrastructure.

The landfall of tropical cyclone Giovanna on 14 February resulted in significant damage to eastern coastal regions, including the heavily populated districts of Toamasina, Brickaville, Ambatolampy and Vatamandry. In addition, south-eastern areas were affected by flooding following the passing of severe tropical storm Irina in early March. Post-cyclone assessments indicate that between 49 and 75 percent of the rice crop was damaged in several eastern districts, while maize and cash crops, including banana and coffee, also suffered losses. In addition, locusts infested an estimated 300 000 hectares of land at the start of the year. To combat the spread, aerial control operations were undertaken in March 2012.

Although official production estimates are not yet available, the damage caused by successive cyclones is expected to result in a reduced 2012 national rice harvest, compared to the previous five-year average.

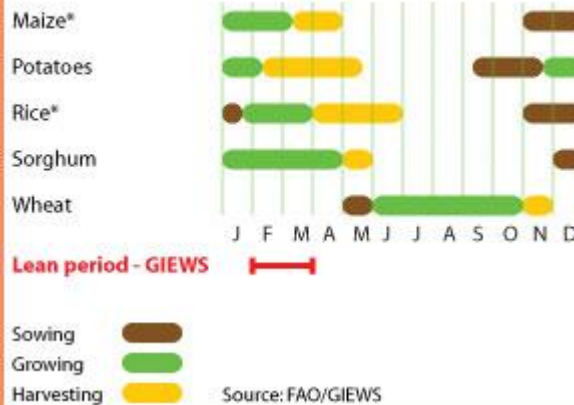
Prices of rice stabilise in June

Following seasonable declines between January and May 2012, prices of local rice stabilised in June 2012 at MGA 1 125 per kg. At this level, the national average price is 10 percent higher than in the same month in 2011, reflecting, in part, the lower anticipated national production. However, regional variations exist across the country, with generally higher prices recorded on the eastern coast and southern districts. Imported rice prices, which generally exhibit less variability than local rice varieties, also stabilised in June, at MGA 1 258 per kg, and similarly remain 6 percent higher than one year earlier.

Cyclone damage aggravates food insecurity in affected areas

The passing of consecutive tropical cyclones has resulted in significant damage in eastern and south-eastern areas. Damage to cash and food crops, as well as households' food stocks is negatively impacting on food availability and access of the affected households. According to a food security and damage assessment, led by FAO, an estimated 84 000 households (approximately 502 000 people) are experiencing severe food insecurity. The worst affected areas are Atsinanana (specifically the districts of Brickaville, Vatamandry, Mahanoro and Toamasina II) and

Madagascar Crop calendar (*major foodcrop)

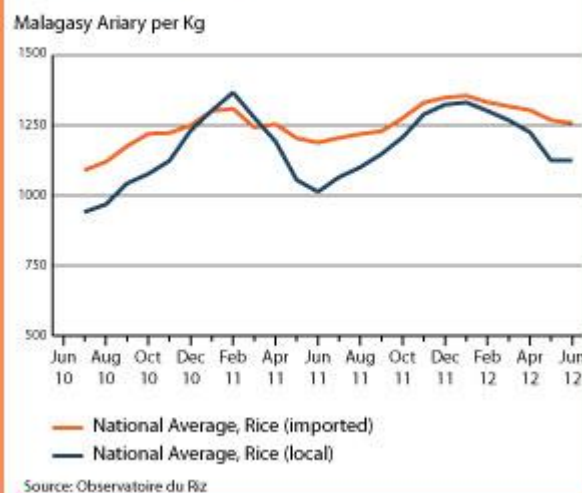


Madagascar Cereal production

	2007-2011 average	2011	2012 forecast	change 2012/2011
	000 tonnes		percent	
Rice (paddy)	4 222	4 300	4 000	-7
Maize	410	430	400	-7
Wheat	10	10	10	0
Others	1	1	1	0
Total	4 643	4 741	4 411	-7

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

Madagascar Retail prices of rice



Atsimo Atsinanana regions. Assistance is currently being provided to the affected population.

Reference Date: 16-March-2012

FOOD SECURITY SNAPSHOT

- Torrential rains and strong winds inflict agriculture damage in coastal areas
- Drop in rice production in 2010/2011 leads to higher prices
- Despite improved food security conditions in southern regions, higher prices are expected to aggravate conditions
- Nearly 247 000 people affected by cyclone Giovanna

Successive cyclones cause crop damage

Planting of the main rice crop was completed in January, while the early harvest of some rice varieties began in February. Following a period of erratic rainfall at the start of the season that resulted in moisture deficits in far northern and western regions, a series of cyclones have brought torrential rainfall and strong winds since the turn of the year, causing damage to crops, infrastructure and loss of lives. The landfall of tropical cyclone Giovanna on February 14 resulted in significant damage to eastern coastal regions, including the heavily populated districts of Toamasina, Brickaville, Ambatolampy and Vatamandry. The cyclone traversed central regions of the country, which represent an important rice growing area, while in Analamanga region, where the early harvest just began, the abundant rains may have negatively impacted harvesting activities and consequently final output. More recently, south-eastern areas were affected by flooding following the passing of severe tropical storm Irina in early March. Early reports indicate damage to cash and food crops, including rice, banana, litchi and sugar cane; however, information on the full extent of the damage to the agriculture sector is not yet available.

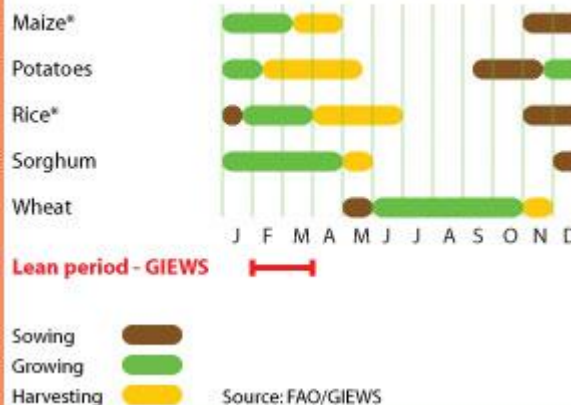
Drop in rice production in 2010/11

The 2010/11 agricultural season was characterised by a dry spell at the beginning of the season resulting in lower rice yields. In addition, about 70 000 hectares of crop land was damaged by cyclone Bingiza in February 2011. Rice production is therefore estimated at about 4.3 million tonnes, about 9 percent below the record output of the previous year, but still some 6 percent higher than the previous five-year average. The large rice producing region of Alaotra-Mangoro was particularly affected by the erratic rains and consequently experienced a large drop in production relative to the preceding season. By contrast to the rest of the country, generally consistent weather patterns prevailed in southern areas, which supported a good harvest in 2011.

Seasonable declines observed for rice prices

The monthly average price of local rice declined in February 2012 as new supplies from the early harvest (*vary aloha*) and from stocks of traders increased. At MGA 1 301 per kg, prices were just below their levels in February 2011. Similarly, there was a marginal decrease in the average price of imported rice in February 2012, down to MGA 1 332. The recent heavy rains have led to an increase in transportation costs, as well as disruptions to supply routes and rice drying activities, leading to a temporary inflation of prices in the affected regions, such as the Sava region in the far north of the country.

Madagascar Crop calendar (*major foodcrop)

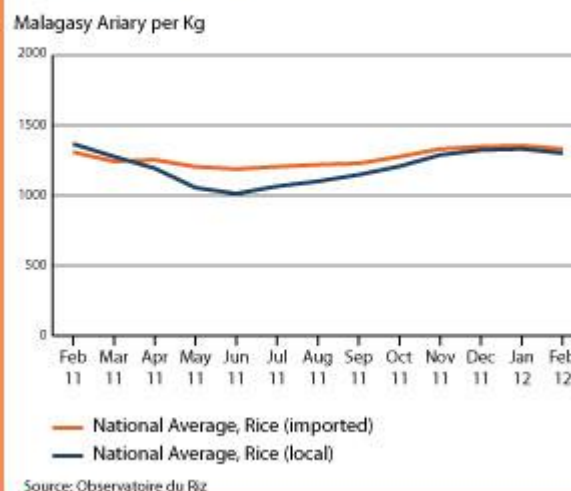


Madagascar Cereal production

	2006-2010 average	2010	2011 estimate	change 2011/2010
	000 tonnes		percent	
Rice (paddy)	4 059	4 762	4 300	-10
Maize	399	412	430	4
Wheat	10	10	10	0
Others	1	1	1	0
Total	4 469	5 185	4 741	-9

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

Madagascar Retail prices of rice



Cyclone damage aggravates food insecurity

The passing of tropical cyclone Giovanna and Irina has resulted in significant damage in eastern areas where it made landfall. Latest government figures show that approximately 247 000 people have been affected, while 44 159 homes have been destroyed. Food assistance is currently being provided by WFP to 16 000 persons in seven affected districts.

Reference Date: 16-February-2012

FOOD SECURITY SNAPSHOT

- Torrential rains and strong winds inflict agriculture damage in coastal areas
- Drop in rice production in 2010/2011 leads to higher prices
- Despite improved food security conditions in southern regions, increasing prices are expected to aggravate conditions
- Nearly 170 000 people affected by cyclone Giovanna

Intense tropical cyclone Giovanna strikes the country in February

Planting of the main rice crop was completed in January, while the early harvest of some rice varieties has just begun. Following a period of erratic rainfall at the start of the season that resulted in moisture deficits in far northern and western regions, recent cyclones have brought torrential rainfall and strong winds since the turn of the year, causing damage to crops, infrastructure and loss of lives. The landfall of tropical cyclone Giovanna on February 14 resulted in significant damage to eastern coastal regions, including the heavily populated districts of Toamasina, Brickaville, Ambatolampy and Vatohandry. The cyclone traversed central regions of the country, which represent an important rice growing area, while in Analamanga region, where the early harvest just began, the abundant rains may have negatively impacted harvesting activities and consequently final output. Early reports indicate damage to cash crops, including banana, litchi and sugar cane; however, information on the full extent of the damage to the agriculture sector is not yet available. Forecasts point to a continuation of heavy rains for the next weeks that may lead to more flooding, and an increased likelihood of further cyclones developing until the end of the cyclone season in April.

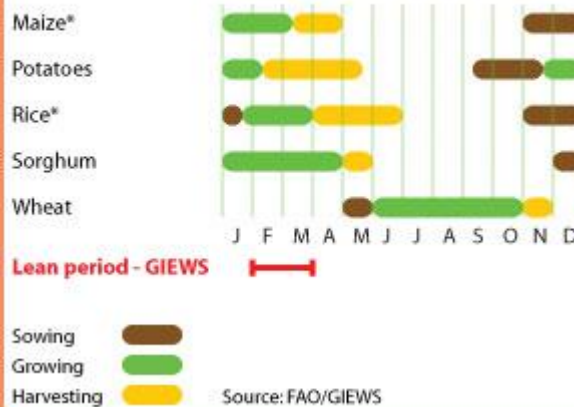
Drop in rice production in 2010/11

The 2010/11 agricultural season was characterised by a dry spell at the beginning of the season resulting in lower rice yields. In addition, about 70 000 hectares of crop land was damaged by cyclone Bingiza in February 2011. Rice production is therefore estimated at about 4.3 million tonnes, about 9 percent below the record output of the previous year, but still some 6 percent higher than the previous five-year average. The large rice producing region of Alaotra-Mangoro was particularly affected by the erratic rains and consequently experienced a large drop in production relative to the preceding season. By contrast to the rest of the country, generally consistent weather patterns prevailed in southern areas, which supported a good harvest in 2011.

Slightly higher rice prices

The monthly average price of local rice, at MGA 1 332 per kg, was at slightly elevated levels in January 2012 compared to the same month in the previous year, following the lower harvest in 2011. There was a slight easing in prices towards the end of 2011 as small quantities of the early rice harvest (*vary aloha*) began entering the market and in January prices levelled off as market supplies increased further. Similarly, imported rice prices at the start of 2012 were marginally higher than one year earlier, at MGA 1 355. Recent heavy rains have also led to disruptions to supply routes and rice drying activities, leading to a temporary inflation of prices

Madagascar Crop calendar (*major foodcrop)

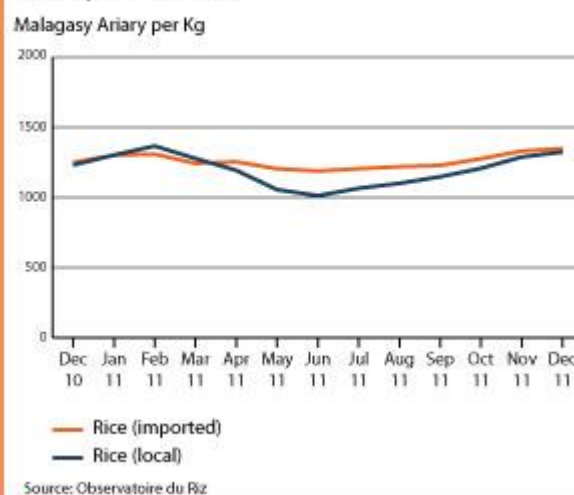


Madagascar Cereal production

	2006-2010 average	2010	2011 estimate	change 2011/2010
	000 tonnes		percent	
Rice (paddy)	4 059	4 762	4 300	-10
Maize	399	412	430	4
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Total	4 469	5 185	4 741	-9

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

Madagascar Retail prices of rice



in the affected regions, such as Boeny, as a result of the lower market supplies.

Between January and October 2011, nearly 150 000 tonnes of rice were imported into the country, of which approximately 50 000 tonnes were imported by the government in an effort to buffer reserve stocks and regulate supplies during the lean season (February to March).

Higher prices and cyclone damage aggravate food insecurity

Despite a slight improvement in the overall food security situation due to above average production levels, particularly in southern regions, higher rice prices have aggravated conditions of vulnerable households. Given households' increasing reliance on market purchases, as the lean season progresses, the prevailing higher food price is expected to aggravate food insecurity. According to results of the joint FAO/WFP crop and food security assessment conducted in July 2011, an estimated 1.5 million persons are severely food insecure. Furthermore, the passing of tropical cyclone Giovanna has resulted in significant damage in eastern areas where it made landfall. Latest government figures show that approximately 170 000 people have been affected, while nearly 4 000 homes have been destroyed. Food assistance is currently being provided to displaced populations in Brickaville.

Reference Date: 10-January-2012

FOOD SECURITY SNAPSHOT

- Erratic rains characterise the start of the 2011/12 agricultural season
- Drop in rice production in 2010/2011
- Despite improved food security conditions in southern regions, increasing prices are expected to aggravate conditions

Start of 2011/12 season characterised by mixed rains

Planting of the main rice crop is almost finalised. Erratic rainfall during the first three months of the 2011/12 agricultural season (October-December) resulted in water deficits in far northern and western regions while average to above average rains were received in the main rice producing regions in north-central parts of the country.

The cyclone season has just begun and in early January a moderate tropical storm, Chandra, caused some localised flooding in western regions. Information on damages is not yet available.

Drop in rice production in 2010/11

The 2010/11 agricultural season was characterised by a dry spell at the beginning of the season resulting in lower rice yields. In addition, about 70 000 hectares of crop land was damaged by cyclone Bingiza in February 2011.

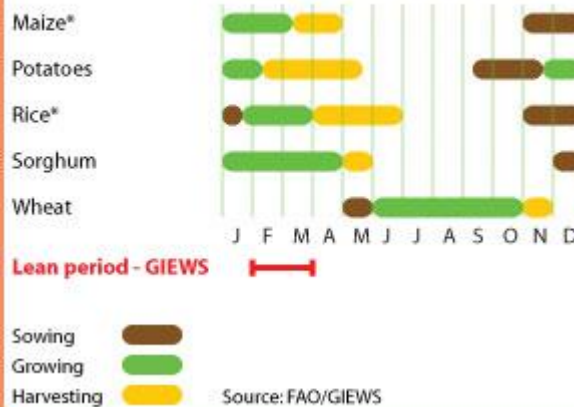
Rice production was therefore reduced to about 4.3 million tonnes, about 9 percent below the previous year, but still some 6 percent higher than the previous five-year average. The large rice producing region of Alaotra-Mangoro was particularly affected by the erratic rains and consequently experienced a large drop in production relative to the preceding season. By contrast to the rest of the country, generally consistent weather patterns prevailed in southern areas, which supported a good harvest in 2011.

Slightly higher rice prices

Monthly prices of local rice, at MGA 1 324 per kg, were at slightly elevated levels in December 2011 compared to the same month in the previous year, following the lower harvest. There was a slight easing in prices towards the end of 2011 as small quantities of the early rice harvest (*vary aloha*) began entering the market. Similarly, imported rice prices have risen by approximately 8 percent over the year 2011 to MGA 1 349, following the depreciation of the Malagasy ariary since mid-July 2011. However, the removal of import duties and taxes has helped ease the increase.

Between January and October 2011, nearly 150 000 tonnes of rice were imported into the country, of which approximately 30 000 tonnes were imported by the government. The government in addition, recently imported 20 000 tonnes of rice from Myanmar in an effort to buffer reserve stocks and help regulate supplies during the lean season.

Madagascar Crop calendar (*major foodcrop)

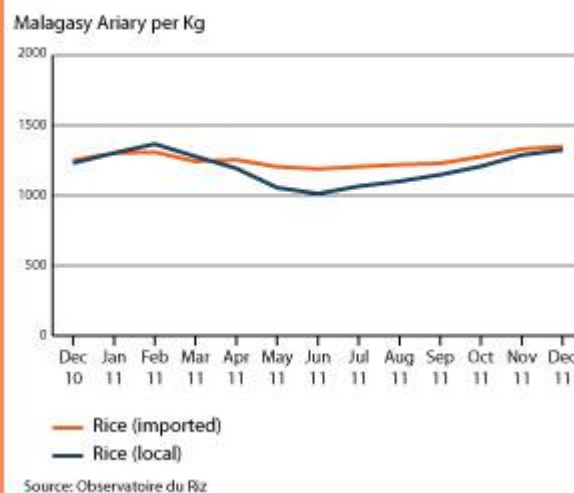


Madagascar Cereal production

	2006-2010 average	2010	2011 estimate	change 2011/2010
	000 tonnes		percent	
Rice (paddy)	4 059	4 762	4 300	-10
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Total	4 469	5 185	4 741	-9

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

Madagascar Retail prices of rice



Higher prices aggravate food insecurity

Despite a slight improvement in overall food security conditions due to favourable production levels, the lower 2011 rice output has fuelled an increase in prices. Given households' increasing reliance on market purchases, as the lean season progresses, the prevailing high food price is expected to aggravate food insecurity. According to the joint FAO/WFP crop and food security assessment conducted in July 2011, an estimated 1.5 million persons are severely food insecure.

Reference Date: 25-May-2011

FOOD SECURITY SNAPSHOT

- Generally favourable rains throughout the agricultural season supported good crop development
- Rice prices decreased in recent months with expectations of a good rice crop
- Passing of cyclone *Bingiza* in February caused flooding in north-eastern and south-eastern districts, damaging paddy fields and prolonging the lean period of the affected households

Generally favourable rains, but cyclone Bingiza causes crop damage

Harvesting of the rice crop, which began in March in the Antananarivo plains, is expected to be complete by the end of June. In the central and southern regions, rainfall has generally been favourable during 2011. In northern areas, following delayed and deficient rains at the beginning of the season in November and December, which postponed planting activities, rains improved in 2011. Farmers were encouraged to use hybrid short-cycle rice varieties, to try and mitigate the effects of the late rains. Rice production is anticipated to be at a similar good level or slightly above last year's output as a result of the generally favourable climatic condition.

The passing of cyclone *Bingiza* during mid-February damaged approximately 26 000 hectares of paddy crop in the northern districts, primarily affecting the Analanjirofo region in the north-east where *Bingiza* made land-fall. In addition, about 40 000 hectares of crops are estimated to have been affected in south-eastern areas. At the national level, the damage represents a relatively small portion of the total area planted to rice, however, given the predominantly subsistence agriculture in the affected area, any production short-fall is expected to impact local food availability. The heavy rains and strong winds also caused localised damage to cassava, coffee and fruit crops.

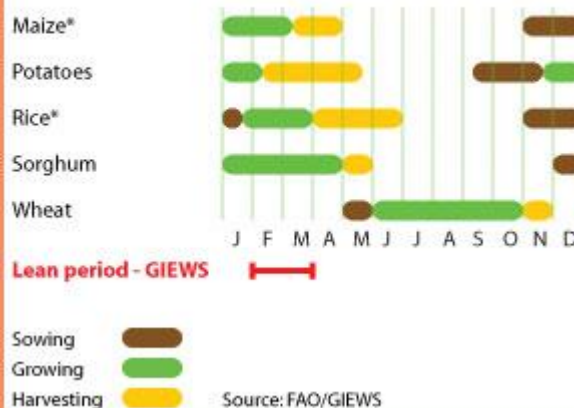
Local and imported rice prices fall over the past three months

The arrival of the 2011 rice crop on markets across the country has exerted downward pressure on prices. The national average price of local varieties has fallen by nearly 21 percent from a seasonal peak in February 2011 of MGA 1 367 per kg to MGA 1 076 in May. At the regional level prices vary, with low levels recorded in Ihorombe on account of good production, while higher prices were observed in Analanjirofo and some areas of Sofia attributed to a delayed harvest and strong demand respectively.

Cyclone damage prolongs lean period in south-eastern districts

Although cyclone *Bingiza* caused minimal damage to food stocks (mainly rice and cassava), the damage to crops is expected to impact food availability, particularly for households that transplanted their rice crops prior to the passing of *Bingiza*. A rapid joint assessment, carried out by

Madagascar Crop calendar (*major foodcrop)

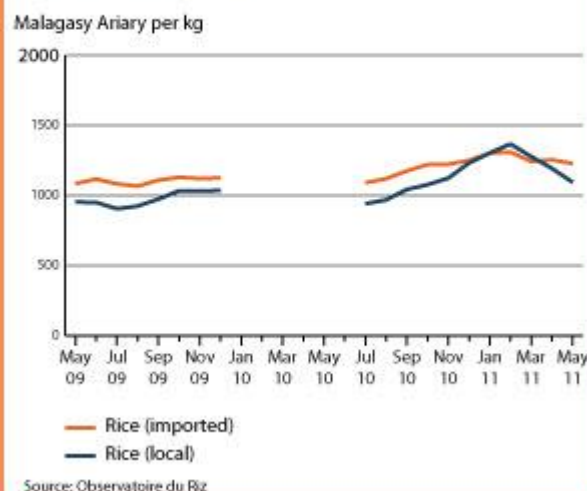


Madagascar Cereal production

	2005-2009 average	2009	2010 estimate	change 2010/2009
	000 tonnes			percent
Rice (paddy)	3786	4540	4785	5
Maize	395	370	412	11
Wheat	10	10	10	0
Others	1	1	1	0
Total	4192	4921	5208	6

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

Madagascar Retail prices of rice



the national Food Security Cluster (including FAO and partner agencies), in Manakara, Vohipeno, Farafangana and Vangaindrano districts indicates that the lean season of the affected households is expected to be prolonged compared to normal years, stretching until May. The assessment further indicates that, based on the household sample of the four districts, 167 370 people are categorized as severely food insecure, while 376 030 are moderately food insecure. However, food security conditions are anticipated to improve, as the continuing harvest will augment food availability at household and market levels.

Reference Date: 8-April-2011

FOOD SECURITY SNAPSHOT

- Passing of cyclone *Bingiza* in February caused flooding in north-eastern and south-eastern districts, damaging paddy fields
- However, southern areas have received generally favourable rains throughout the agricultural season, supporting crop development
- Rice prices decreased in recent months, but remain at high levels
- Damage caused by cyclone *Bingiza* prolongs lean period of the affected households

Rains improve in northern areas, but cyclone *Bingiza* causes crop damage

The passing of cyclone *Bingiza* during mid-February damaged approximately 26 000 hectares of paddy crop in the northern districts, primarily affecting the Analanjirofo region in the north-east where *Bingiza* made land-fall. In addition, about 40 000 hectares of crops are estimated to have been affected in south-eastern areas. At the national level, the damage represents a relatively small portion of the total area planted to rice, however, given the predominantly subsistence agriculture in the affected area, any production short-fall is expected to impact local food availability. The heavy rains and strong winds also caused localised damage to cassava, coffee and fruit crops.

In the central and southern regions, however, rainfall has generally been favourable during 2011. In northern areas, following delayed and deficient rains at the beginning of the season in November and December, which postponed planting activities, rains generally improved in 2011. Farmers were encouraged to use hybrid short-cycle rice varieties, to try and mitigate the effects of the late rains.

Harvesting of some of the early planted rice crops has already begun in the Antananarivo plains, while in the southern districts the maize harvest is underway.

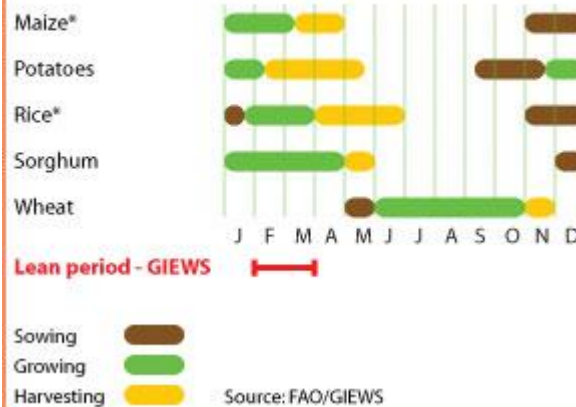
Bumper rice harvest achieved in 2010

A joint FAO/WFP Crop and Food Security Assessment Mission (CFSAM) in mid-2010 concluded that the rice harvest for the 2009/10 agriculture season reached about 4.8 million tonnes, in paddy terms, representing a 5 percent increase over the previous year's harvest. Rice production grew markedly in Alaotra Mangoro, Sofia and Sava regions, with favourable rainfall patterns supporting productivity. However, flooding and periods of drought in the south caused significant production short-falls, particularly in Androy and Anosy regions, where estimates indicate losses of 40 percent of the rice crop. Similarly, in the eastern areas of Vatovavy Fitovinany and Atsimo Atsinanana, flooding caused by cyclone Hubert resulted in significant losses of the second season paddy crop, estimates indicate a 70 percent fall in production.

Local and imported rice prices remain high, but have fallen in recent months

Madagascar

Crop calendar (*major foodcrop)



Madagascar

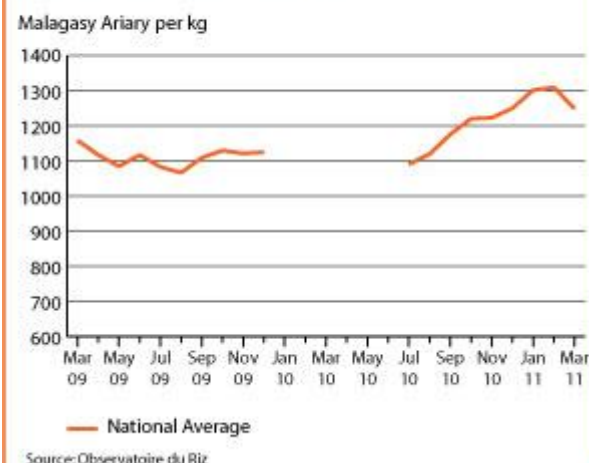
Cereal production

	2005-2009 average	2009	2010 estimate	change 2010/2009
	000 tonnes			percent
Rice (paddy)	3786	4540	4785	5
Maize	395	370	412	11
Wheat	10	10	10	0
Others	1	1	1	0
Total	4192	4921	5208	6

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

Madagascar

Retail price of imported rice



Despite continued high price levels, new supplies from the early harvest have contributed to a decline in the price of local rice varieties in March compared to February. However, prices still remain high, having increased seasonally since July 2010 and in some areas price levels were strengthened further following trade route disruptions by cyclone *Bingiza*. Although good supplies of imported rice have helped maintain steady price levels during the first three months of 2011, the average price in March, at MGA 1243 per kg, was approximately 9 percent higher than the previous three-year average. Similarly, prices of maize have decreased in March, on account of new supplies from the recent harvest, but levels differ markedly across the country, varying between MGA 500 and MGA 1000 per kg for grain.

Cyclone damage prolongs lean period in south-eastern districts

Although cyclone *Bingiza* caused minimal damage to food stocks (mainly rice and cassava), the damage to crops is expected to impact food availability, particularly for households that transplanted their rice crops prior to the passing of *Bingiza*. A recent rapid joint assessment, carried out by the national Food Security Cluster (including FAO and partner agencies), in Manakara, Vohipeno, Farafangana and Vangaindrano districts indicates that the lean season of the affected households is expected to be prolonged compared to normal years, stretching until May. The assessment further indicates that, based on the household sample of the four districts, 167 370 people are categorized as severely food insecure, while 376 030 are moderately food insecure.

At the national level, the 2010 CFSAM estimated that 2.6 million people would be severely food insecure in 2010/11, and an additional 2.2 million were categorised as moderately food insecure.

Reference Date: 14-September-2010

FOOD SECURITY SNAPSHOT

- Bumper 2010 rice crop, with large increases observed in the north.
- Rice prices generally stable with marginal seasonal increases.
- Overall, the food security situation is stable, but chronic difficulties in southern municipalities persist.

Record 2009/10 rice harvest, as a result of favourable rains in the north

The 2009/10 season's rice (the main food staple) crop was harvested at the end of June, following favourable conditions in the main producing Central Highlands and northern regions. Despite some damage caused by tropical storm *Hubert* in March – according to National Office for Disaster and Risk Management about 61 000 hectares were affected (mainly in the regions of the south-east) – and late plantings in the south on account of insufficient rainfall at the start of the season, preliminary FAO/GIEWS estimates indicate rice (paddy) production at 4.8 million tonnes. This marks a 14 percent increase over last season's output, and represents a bumper paddy crop. Rice production grew markedly in Alaotra Mangoro, Sofia and Sava, with favourable rainfall patterns supporting productivity. By contrast southern regions, particularly the south-west, suffered poor production levels, primarily attributed to erratic rainfall and seasonal deficits – estimates indicate that 40 percent of the rice crop in Anosy was lost. However, increased rainfall levels, associated with the passing of tropical storm *Joel* at the end of May, enabled farmers to replant sweet potatoes and other vegetable crops.

Locust swarms spread north

An unknown number of locusts have moved out of the country's south-western corner and have begun to spread east and north, as far as Maintirano. The Government has estimated that about 460 000 rural households could potentially be affected by the infestation, if the locust swarm are not contained before the onset of the rainy season in October, which will create favourable breeding conditions. An estimated 500 000 hectares of land have been identified for treatment.

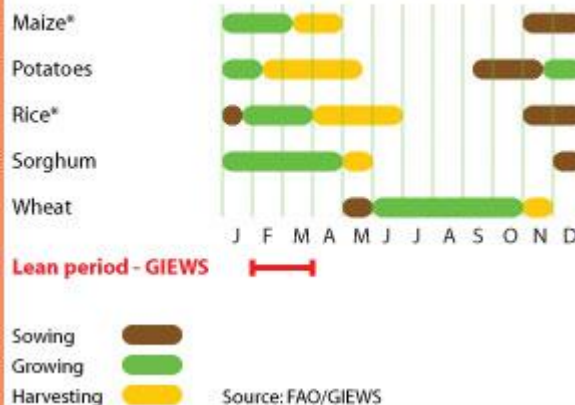
Rice prices generally stable but with seasonal increases

Prices of local rice (national average) rose marginally by 3 percent between July and August, conforming to seasonal increases – higher transport costs have also been attributed to the recent increase in retail prices. At MGA 968 per kg, as of August 2010, prices are slightly above the levels recorded in same month last year, but they have remained comparatively stable during 2010. Similarly, imported rice prices increased by a similar amount during the preceding two months.

Food security conditions stable in the south

The Early Warning System has revised the number of municipalities experiencing severe food insecurity to 52 from 65, as markets in the south continue to be supplied with produce from the northern regions.

Madagascar Crop calendar (*major foodcrop)

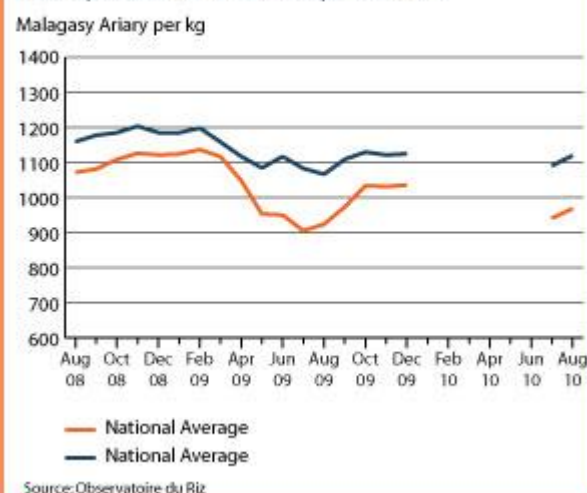


Madagascar Cereal production

	2005-2009	2010		change 2010/2009
	average	2009	forecast	
	000 tonnes			percent
Rice (paddy)	3718	4200	4785	14
Maize	395	370	464	25
Wheat	10	10	10	0
Others	1	1	1	0
Total	4123	4581	5260	15

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

Madagascar Retail price of local and imported rice



An impact assessment survey in the southern municipalities, conducted in March 2010, indicates that 28 percent of households had poor consumption levels, representing a significant decline from 84 percent recorded in the same month last year. However, about 100 000 persons located in the southern municipalities are still categorised as acutely food insecure.

Reference Date: 20-March-2010

FOOD SECURITY SNAPSHOT

- Outlook for 2010 crops remains uncertain in the centre and south. Tropical storm Hubert caused deaths and extensive crop damage in the south east.
- Rice production was again good in 2009, but maize and cassava output was sharply reduced in southern regions.
- Rice prices decreased in 2009 with the good harvest, but have seasonally climbed again in the second half of the year.
- Overall food security stable but serious situation persist in the chronically food insecure southern regions.

Main season 2010 crop outlook uncertain in the south and part of centre. Tropical storm damage in south east

The outlook for the main season rice and other cereal crops about to be harvested remains uncertain. Analysis of satellite-based rainfall record indicate that after a good start of the rains in October and November, a prolonged dry spell in since late December through end of February has reduced soil moisture in most of southern and parts of central Madagascar and crop development, especially maize and rice, is likely to have been affected in several areas. Satellite imagery as of 20th March 2010 show a large reduction in vegetation activity in parts of central and most of southern region of the island.

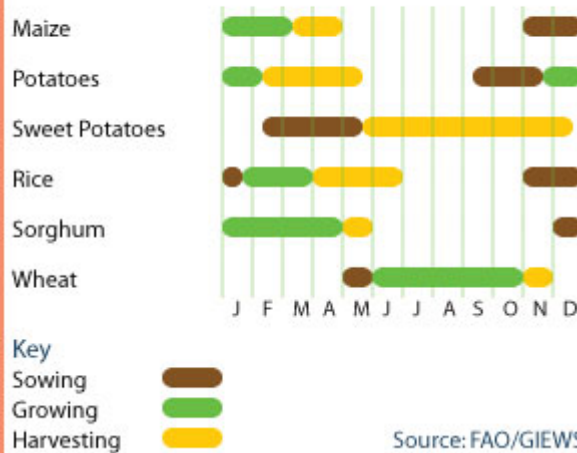
The cyclones season runs from December through April. Contrary to other years major cyclones have spared the island this year. However Tropical Storm Hubert has struck the south-eastern region on 12 March causing 41 deaths and extensive infrastructure and crop damage. The Government of Madagascar has appealed for international assistance. FAO and other agencies have responded with provision of inputs, especially rice seeds.

Comparatively low producer prices for rice, prior to the planting period for the 2009/10 agricultural season in November, could have lead to a reduction in rice intensification efforts by small producers. In addition, the unstable political situation has disrupted the level of technical and financial support provided to the agriculture sector by the Government. In particular the programme of Government distribution of subsidized fertilizers and seeds supplies has been suspended.

Rice harvests in 2009 was good, but maize and cassava in southern provinces sharply reduced

Favourable rainfall levels from October 2008 and April 2009 contributed to an increase in rice production in 2009, estimated at 2.8 million tonnes (milled) by a joint FAO/WFP assessment mission. This marks an increase of 2.4 percent over the previous year's good production levels. Despite causing significant damage to infrastructure, severe cyclones, which mostly affected the eastern regions of the country in early 2009, had a limited impact on agriculture production. However, dry conditions in the south led to lower production levels for maize and cassava, the main staple in the region. In Toliara, which normally contributes approximately 30 percent to total national maize production,

Crop calendar Madagascar



Madagascar

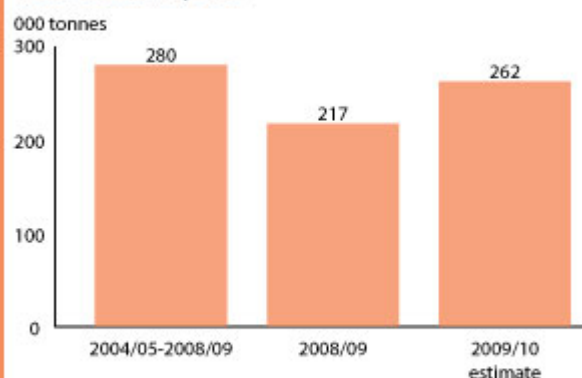
Cereal production

	2004-2008 average	2008	2009 estimate	change 2009/2008
	000 tonnes			percent
Rice (paddy)	3484	3914	4200	7
Maize	390	435	370	-15
Wheat	10	10	10	0
Others	1	1	1	0
Total	3885	4361	4581	5

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

Madagascar

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

the FAO/WFP mission estimated that maize production declined by half compared to the previous season's output. The low cereal production has intensified the already precarious food security situation in the region, following a succession of droughts and poor harvests.

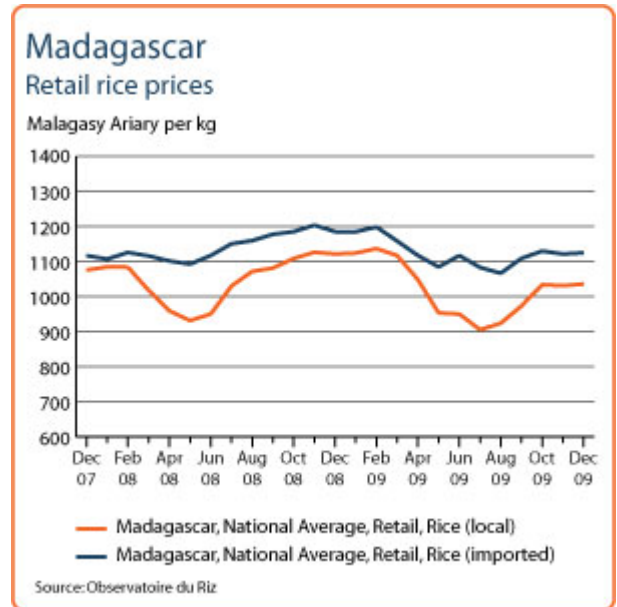
The cereal import requirement for the 2009/10 marketing year (April/March) was estimated at 260 000 tonnes, mostly wheat and rice. Limited information available from major trading partners indicates that the level of cereal imports so far has been much lower than the estimated requirement.

Rice prices show seasonal increases

Prices of rice (national average) that had declined up to mid 2009, from their peaks in November 2008, reached a low of MGA 905 per kg in July 2009. The fall in prices reflected the increased market availability following improved rice harvest in April-June 2009. However, rice prices have started to rise again since August although in December 2009 were lower than a year earlier. The increase in prices in this period of the year is normal as the lean season approaches. The depreciation of the Ariary against the US Dollar has probably contributed to the widening of the price difference between local and imported rice prices in recent months. However, the Government has maintained the elimination of VAT and tariffs on imported rice, which has helped to mitigate the inflationary effects of the currency depreciation.

Overall food security stable but serious situation persist in the drought prone south

According to a recent UN survey, owing to a better rice harvest in 2009, the proportion of food insecure among the poor vulnerable households in the capital of Antananarivo had declined to 40 percent in November 2009 from 65 percent a year earlier. However, Madagascar as a whole has the highest level of acute malnutrition (15 percent) and chronic malnutrition (53 percent) in Southern Africa. The current uncertain crop outlook in central and southern regions is cause of concern as it may mean that production will be reduced this year. In the South, food insecurity is characterised by both low availability and poor access to food.



Reference Date: 2-February-2010

FOOD SECURITY SNAPSHOT

- Early outlook for 2010 crops remains unfavourable in the south. Cyclone threat still present
- Rice production was again good in 2009, but maize and cassava output was sharply reduced in southern regions
- Rice prices decreased with the good harvest, have seasonally climbed again in the second half of the year
- Southern regions remain food insecure

Main season 2010 crop production unfavourable in the south. Cyclone damage still feared

The outlook for the main season rice and other cereal crop is uncertain overall and unfavourable in the south. After a good start of the rains in October and November, a prolonged dry spell in most of December and January has reduced soil moisture in most of southern and parts of central Madagascar and crop development, especially maize, is likely to have been affected in several areas. Satellite imagery as of 30 January 2010 show a large reduction in vegetation activity in parts of central and most of southern regions of the island.

The cyclones season runs from December through April. So far cyclones have spared the island this year. The UN Country Team appealed in November 2009 for assistance to pre-position emergency supplies in most vulnerable areas but no pledges have been received so far.

Rice harvests in 2009 was good, but maize and cassava in southern provinces sharply reduced

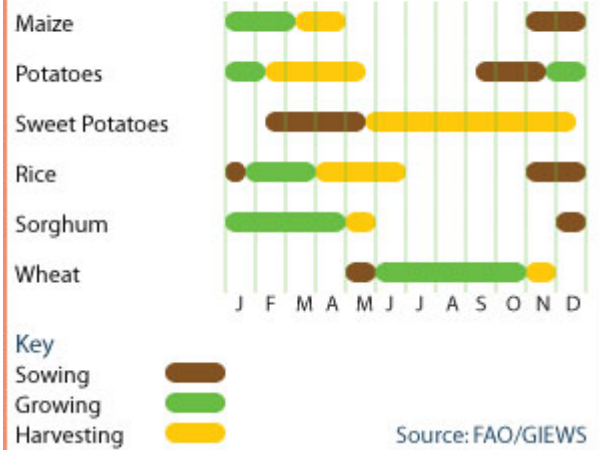
Favourable rainfall levels from October 2008 and April 2009 contributed to an increase in rice production in 2009, estimated at 2.8 million tonnes (milled) by a joint FAO/WFP Crop and Food Security Assessment Mission (CFSAM). This marks an increase of 2.4 percent over the previous year's good production levels. Despite causing significant damage to infrastructure, severe cyclones, which mostly affected the eastern regions of the country from December 2008 to April 2009, had a limited impact on agriculture production. However, dry conditions in the south led to lower production levels for maize and cassava, the main staple in the region. In Toliara, which normally contributes approximately 30 percent to total national maize production, the CFSAM estimated that maize production declined by half compared to the previous season's output. The low cereal production has intensified the already precarious food security situation in the region, following a succession of droughts and poor harvests.

For the 2009/10 marketing year (April/March) the country faces a cereal deficit of 260 000 tonnes. The Government has pledged to import 150 000 tonnes of rice in 2009/10 marketing year (April/March), with the commercial sector expected to import the remaining cereal requirement.

Low producer prices for rice

Comparatively low producer prices for rice, prior to the planting period

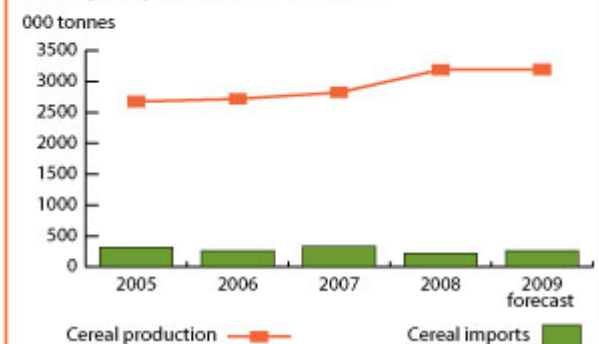
Crop calendar Madagascar



Madagascar Cereal production and imports

Cereal production	2004-2008	2008	2009	change* 2009/2008
	average		forecast	
	000 tonnes		percent	
Rice (milled)	2359	2747	2814	2.4%
Maize	390	435	370	-15%
Wheat	10	10	10	0%
Other	1	1	1	0%
Total Cereals	2760	3193	3195	0%

* Percentage change calculated from unrounded data.

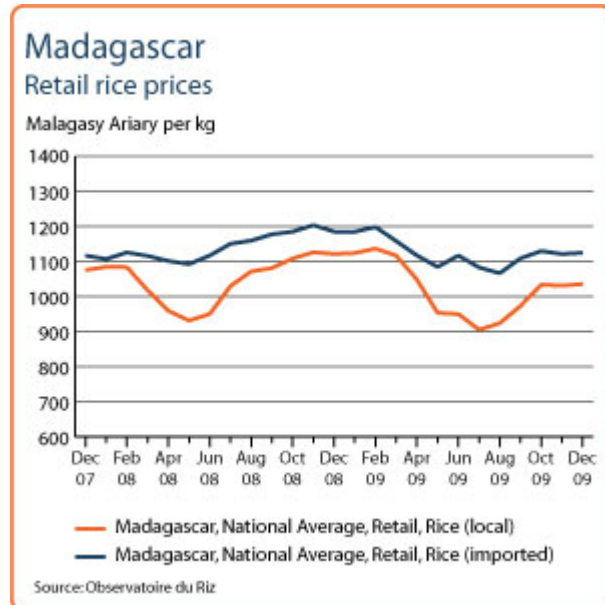


Source: FAO/GIEWS Country Cereal Balance Sheets

for the 2009/10 agricultural season in November, could have lead to a reduction in rice intensification efforts by small producers. In addition, the unstable political situation has disrupted the level of technical and financial support provided to the agriculture sector by the Government. In particular the programme of Government distribution of subsidized fertilizers and seeds supplies has been suspended.

Rice prices show seasonal increases

Prices of rice (national average) that had declined up to mid 2009, from their peaks in November 2008, reached a low of MGA 905 per kg in July 2009. The fall in prices reflected the increased market availability following improved rice harvest in April-June 2009. However, rice prices have started to rise again since August and in December 2009 were close to year earlier levels. The increase in prices in this period of the year is normal as the lean season approaches. The depreciation of the Ariary against the US Dollar has probably contributed to the widening of the price difference between local and imported rice prices in recent months. However, the Government has maintained the elimination of VAT and tariffs on imported rice, which has helped to mitigate the inflationary effects of the currency depreciation.



Overall food security improved but serious situation persist in the drought prone south

According to a recent UN survey, owing to a better rice harvest in 2009, the proportion of food insecure among the poor vulnerable households in the capital of Antananarivo had declined to 40 percent in November 2009 from 65 percent a year earlier. However, in the South, estimates from the Government’s early warning system indicate that 45 municipalities, with an estimated population of 560 000, are food insecure, following their low cereal harvest in 2009 as a result of rainfall deficits. The food insecurity situation in the southern regions is compounded further due to successive seasons of poor cereal production. The current dry spell in these regions is cause of concern as it may mean that production will also be reduced this year. Food insecurity in this region is characterised by both low availability and poor access to food.

Reference Date: 25-January-2010

FOOD SECURITY SNAPSHOT

- Early outlook for 2010 crops remains uncertain and unfavourable in the south. Cyclone threat still present
- Rice production was again good in 2009, but maize and cassava output was sharply reduced in southern regions
- Rice prices decreased with the good harvest, have seasonally climbed again in the second half of the year
- Southern regions remain food insecure

Main season 2010 crop production uncertain due to prolonged dry spell. Cyclone damage still feared

The outlook for the main season rice and other cereal crop is uncertain. After a favourable start of the rains in October and November, a 3 weeks dry spell has reduced soil moisture in central and southern Madagascar and crop development is likely to have been affected in several areas. Satellite imagery as of 20 January 2010 show a large reduction in vegetation activity in central and southern parts of the island.

The cyclones season runs from December through April. So far cyclones have spared the island this year. The UN Country Team appealed in November 2009 for assistance to pre-position emergency supplies in most vulnerable areas but no pledges have been received so far.

Rice harvests in 2009 was good, but maize and cassava in southern provinces sharply reduced

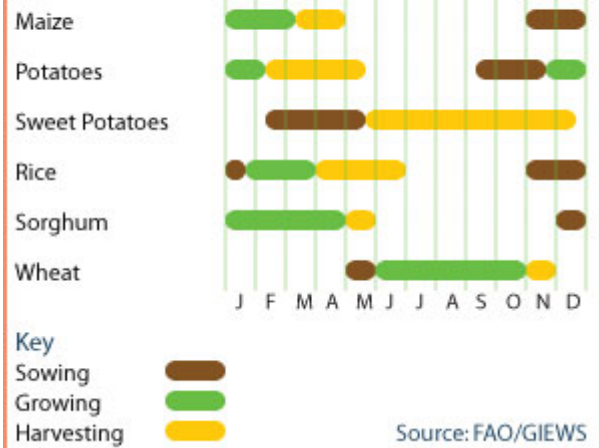
Favourable rainfall levels from October 2008 and April 2009 contributed to an increase in rice production in 2009, estimated at 2.8 million tonnes (milled) by a joint FAO/WFP Crop and Food Security Assessment Mission (CFSAM). This marks an increase of 2.4 percent over the previous year's good production levels. Despite causing significant damage to infrastructure, severe cyclones, which mostly affected the eastern regions of the country from December 2008 to April 2009, had a limited impact on agriculture production. However, dry conditions in the south led to lower production levels for maize and cassava, the main staple in the region. In Toliara, which normally contributes approximately 30 percent to total national maize production, the CFSAM estimated that maize production declined by half compared to the previous season's output. The low cereal production has intensified the already precarious food security situation in the region, following a succession of droughts and poor harvests.

For the 2009/10 marketing year (April/March) the country faces a cereal deficit of 260 000 tonnes. The Government has pledged to import 150 000 tonnes of rice in 2009/10 marketing year (April/March), with the commercial sector expected to import the remaining cereal requirement.

Low producer prices for rice

Comparatively low producer prices for rice, prior to the planting period for the 2009/10 agricultural season in November, could have lead to a

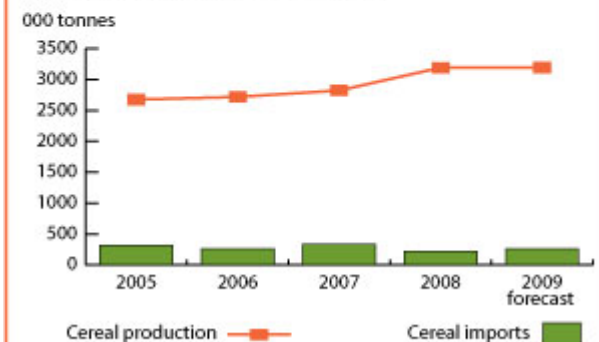
Crop calendar Madagascar



Madagascar Cereal production and imports

Cereal production	2004-2008	2008	2009	change*
	average		forecast	2009/2008
	000 tonnes		percent	
Rice (milled)	2359	2747	2814	2.4%
Maize	390	435	370	-15%
Wheat	10	10	10	0%
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* Percentage change calculated from unrounded data.

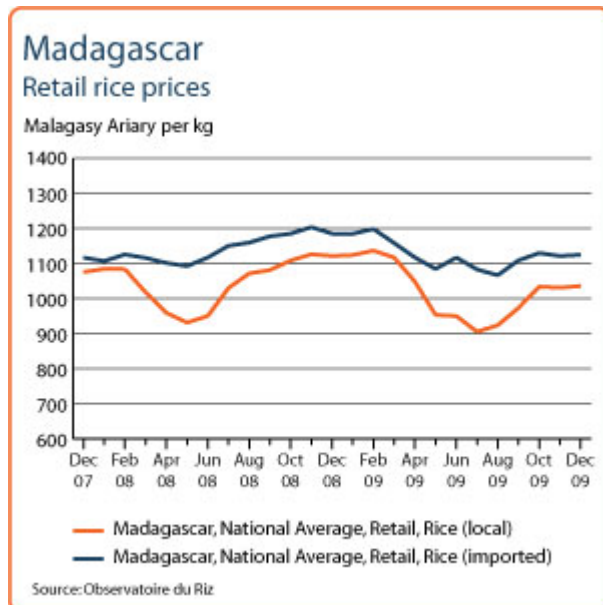


Source: FAO/GIEWS Country Cereal Balance Sheets

reduction in rice intensification efforts by small producers. In addition, the unstable political situation has disrupted the level of technical and financial support provided to the agriculture sector by the Government. In particular the programme of Government distribution of subsidized fertilizers and seeds supplies has been suspended.

Rice prices show seasonal increases

Prices of rice (national average) that had declined up to mid 2009, from their peaks in November 2008, reached a low of MGA 905 per kg in July 2009. The fall in prices reflected the increased market availability following improved rice harvest in April-June 2009. However, rice prices have started to rise again since August and in December 2009 were close to year earlier levels. The increase in prices in this period of the year is normal as the lean season approaches. The depreciation of the Ariary against the US Dollar has probably contributed to the widening of the price difference between local and imported rice prices in recent months. However, the Government has maintained the elimination of VAT and tariffs on imported rice, which has helped to mitigate the inflationary effects of the currency depreciation.



Overall food security improved but serious situation persist in the drought prone south

According to a recent UN survey, owing to a better rice harvest in 2009, the proportion of food insecure among the poor vulnerable households in the capital of Antananarivo had declined to 40 percent in November 2009 from 65 percent a year earlier. However, in the South, estimates from the Government’s early warning system indicate that 45 municipalities, with an estimated population of 560 000, are food insecure, following their low cereal harvest in 2009 as a result of rainfall deficits. The food insecurity situation in the southern regions is compounded further due to successive seasons of poor cereal production. The current dry spell in these regions is cause of concern as it may mean that production will also be reduced this year. Food insecurity in this region is characterised by both low availability and poor access to food.

Reference Date: 10-January-2010

FOOD SECURITY SNAPSHOT

- Early outlook for 2010 crops uncertain due to dry spell. Cyclone threats mounting
- Rice production was again good in 2009, but maize and cassava output was sharply reduced in southern regions
- Rice prices decreased with the good harvest, have seasonally climbed again in the second half of the year
- Southern regions remain food insecure

Main season 2010 crop production uncertain due to prolonged dry spell. Cyclone damage feared

The outlook for the main season rice and other cereal crop is uncertain. After a favourable start of the rains in October and November, a 3 weeks dry spell has reduced soil moisture in central and southern Madagascar and crop development is likely to have been affected in several areas. Satellite imagery as of early January 2010 show a large reduction in vegetation activity in central and south western part of the island and in the north east.

The cyclones season runs from December through April. So far cyclones have spared the island this year, but cyclone Edzani was threatening the island as of 10 January. The UN Country Team appealed in Nov. 2009 for assistance to pre-position emergency supplies in most vulnerable areas but no pledges have been received so far.

Rice harvests in 2009 was good, but maize and cassava in southern provinces sharply reduced

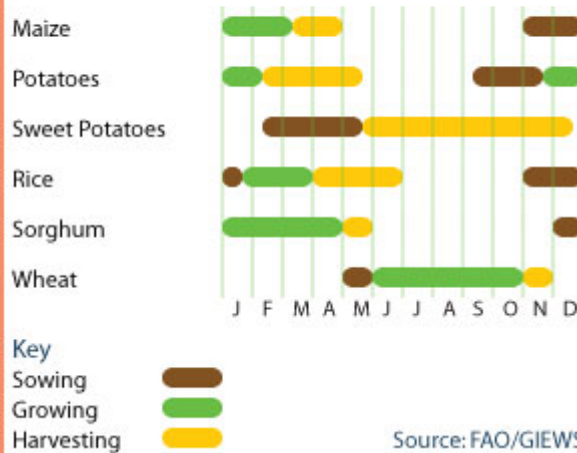
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For the 2009/10 marketing year (April/March) the country faces a cereal deficit of 260 000 tonnes. The Government has pledged to import 150 000 tonnes of rice in 2009/10 marketing year (April/March), with the commercial sector expected to import the remaining cereal requirement.

Low producer prices for rice

Comparatively low producer prices for rice, prior to the planting period

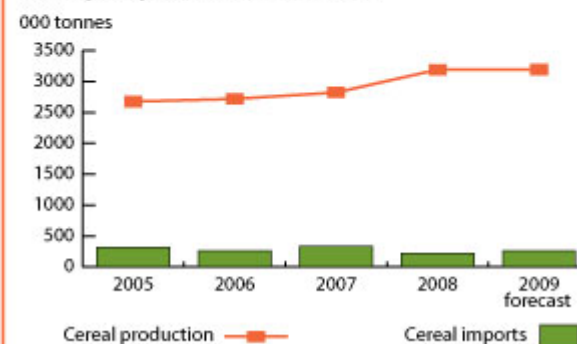
Crop calendar Madagascar



Madagascar Cereal production and imports

Cereal production	2004-2008	2008	2009	change* 2009/2008
	average		forecast	
	000 tonnes		percent	
Rice (milled)	2359	2747	2814	2.4%
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Other	1	1	1	0%
Total Cereals	2760	3193	3195	0%

* Percentage change calculated from unrounded data.



Source: FAO/GIEWS Country Cereal Balance Sheets

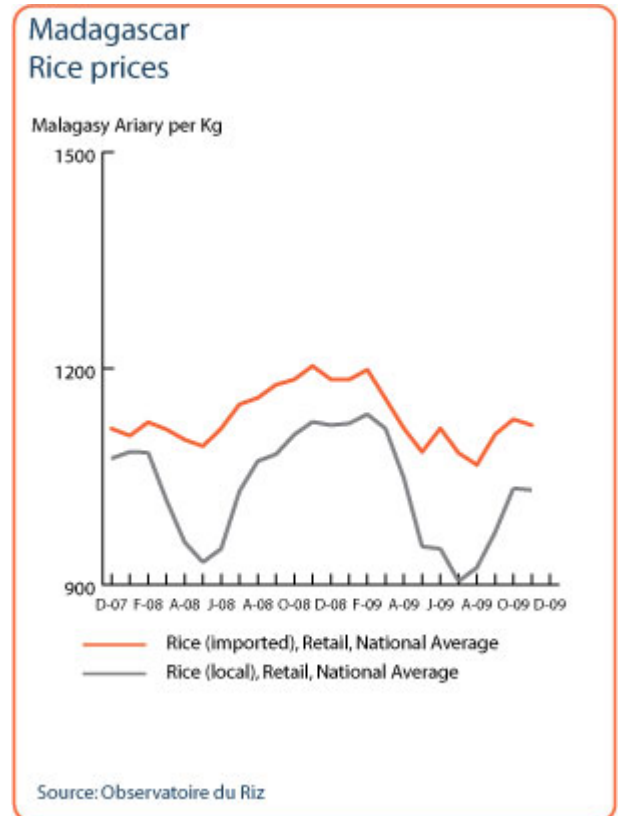
for the 2009/10 agricultural season in November, could have lead to a reduction in rice intensification efforts by small producers. In addition, the unstable political situation may have also disrupted the level of technical and financial support provided to the agriculture sector by the Government.

Rice prices show seasonal increases

Prices of rice (national average) that had declined up to mid 2009, from their peaks in November 2008, reached a low of MGA 905 per kg in July 2009. The fall in prices reflected the increased market availability following improved rice harvest in April-June 2009. However, rice prices have started to rise again since August and in December 2009 were close to year earlier levels. The increase in prices in this period of the year is normal as the lean season approaches. The depreciation of the Ariary against the US Dollar has probably contributed to the widening of the price difference between local and imported rice prices in recent months. However, the Government has maintained the elimination of VAT and tariffs on imported rice, which has helped to mitigate the inflationary effects of the currency depreciation.

Continued food insecurity in the drought prone south

Estimates from the Government's early warning system indicate that 45 municipalities in the south, with an estimated population of 560 000, are food insecure, following their low cereal harvest in 2009 as a result of rainfall deficits. The food insecurity situation in the southern regions is compounded further due to successive seasons of poor cereal production. The current dry spell in these regions is cause of concern as it may mean that production will also be reduced this year. Food insecurity in this region is characterised by both low availability and poor access to food.



Reference Date: 21-September-2009

FOOD SECURITY SNAPSHOT

- Increased rice production in 2009, but rainfall deficits in southern maize producing regions
- Rice prices that have decreased with the good harvest, begin to climb in August
- Southern regions remain food insecure

Improved rice harvests in 2009, but low production levels in southern provinces

Favourable rainfall levels from October 2008 and April 2009 contributed to an increase in rice production in 2009, estimated at 2.8 million tonnes (milled) by the joint FAO/WFP Crop and Food Security Assessment Mission (CFSAM). This marks an increase of 2.4 percent over last year's good production levels. Despite causing significant damage to infrastructure, the cyclones, which mostly affected the eastern regions of the country from December 2008 to April 2009, had a limited impact on agriculture production. However, dry conditions in the south led to lower production levels for maize and cassava. In Toliara, which normally contributes approximately 30 percent to total national maize production, the CFSAM estimated that maize production declined by half compared to the previous season's output. The low cereal production is likely to intensify the already precarious food security situation in the region, following a succession of droughts and poor harvests. For the 2009/10 marketing year (April/March) the country faces a cereal deficit of 206 000 tonnes. The Government has pledged to import 150 000 tonnes of rice in 2009/10 marketing year, with the commercial sector expected to import the remaining cereal requirement.

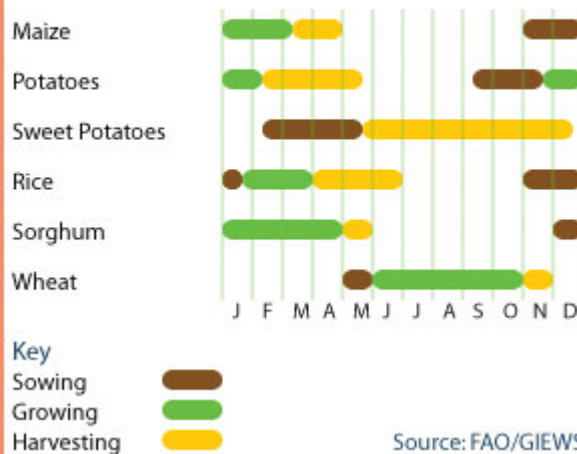
Low producer prices for rice

Comparatively low producer prices for rice, prior to the planting period that begins in November for the 2009/10 agricultural season, could lead to a reduction in rice intensification efforts by small producers. In addition, the unstable political situation may also disrupt the level of technical and financial support provided to the agriculture sector by the Government.

Decline in average national rice prices

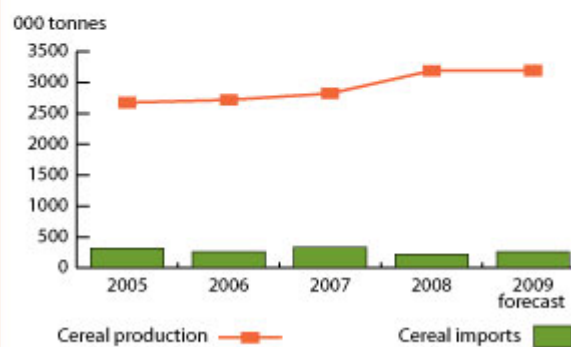
Prices of rice (national average) decreased during the first half of 2009, since peaking in November 2008, reaching a low of MGA 1083 per kg in July 2009. The fall in prices reflects the increased market availability following improved rice harvest in April-June 2009. However, rice prices began climbing in August and are fractionally higher in September 2009 compared to a year earlier, at MGA 1179 per kg. Prices still remain 11 percent higher than levels recorded in 2007 for the same month. The depreciation of the Ariary against the US Dollar may contribute to maintaining higher import rice prices, adding further inflationary pressure during the lean season. However, the Government maintained the elimination of VAT and tariffs on imported rice, which will help to mitigate the inflationary effects of the currency depreciation.

Crop calendar Madagascar



Cereal production and imports Madagascar

Cereal production	2004-2008	2008	2009	change
	average		forecast	2009/2008
	000 tonnes			percent
Rice (milled)	2359	2747	2814	2.4%
Maize	390	435	370	-14.9%
Wheat	10	10	10	0%
Other	1	1	1	0%
Total Cereals	2760	3193	3195	0.1%



Source: FAO/GIEWS Country Cereal Balance Sheets

Continued food insecurity in the drought prone south

Estimates from the Government's early warning system indicate that 45 municipalities in the south, with an estimated population of 560 000, are food insecure, following their low cereal harvest in 2009 as a result of rainfall deficits. The food insecurity situation in the southern regions is compounded further due to successive seasons of poor cereal production. Food insecurity in this region is characterised by both low availability and poor access to food.

