



GIEWS Country Brief

The Republic of the Union of Myanmar

Reference Date: 14-June-2023

FOOD SECURITY SNAPSHOT

- **Below-average 2022 cereal production forecast**
- **Cereal exports forecast to increase**
- **Prices of rice at record high in May**

Below-average 2022 cereal output forecast

The 2022 cropping season will finalize in late June following the completion of the secondary crop harvests. The aggregate 2022 paddy production is forecast at 24.7 million tonnes, about 8 percent below the five-year average. Despite a near-average area planted, the poor performance is attributed to low yields as farmers faced challenges in accessing agricultural inputs, particularly agrochemicals, due to reduced availability and high prices. The aggregate 2022 maize production is estimated at a near-average level of 2.1 million tonnes, 12 percent less the previous year. The area planted reached an above-average level driven by robust export demand and remunerative domestic prices. However, constrained access to agricultural inputs and below-average precipitation amounts in the key maize-producing northern areas resulted in the lowest average yields since 2015.

Cereal production prospects for 2023 main crops, currently being planted and for harvest at the end of the year, are uncertain. Although the high cereal prices may encourage farmers to cultivate an above-average area, shortages and elevated prices of agricultural inputs are likely to persist, potentially curtailing crop yields.

Cereal exports in 2023/24 forecast at above-average level

Rice exports in calendar year 2023 are forecast at 2.4 million tonnes, up 150 000 tonnes from the 2022 estimated volume. The government has implemented a measure that mandates exporters to convert 65 percent of their export earnings into kyat at the reference rate set by the Central Bank of Myanmar, which is on average 35 percent lower than the market exchange rate. Exports of maize are forecast at 1.7 million tonnes, 10 percent above the average, reflecting strong demand from neighbouring countries, including China (mainland) and Thailand.

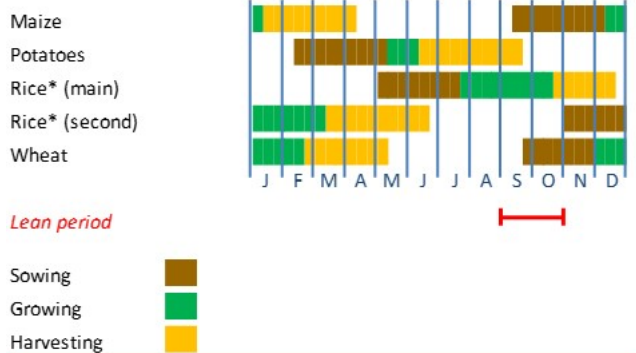
Prices of rice at record high levels

Domestic prices of “Emata” rice, a widely consumed quality, have steadily increased since January 2022 and reached record highs

Myanmar

Crop Calendar

(*major foodcrop)



Myanmar

Cereal Production

	2017-2021 average	2021	2022 forecast	change 2022/2021
	000 tonnes			percent
Rice (paddy)	26 916	27 438	24 680	-10.1
Maize	2 070	2 400	2 100	-12.5
Millet	165	150	145	-3.3
Others	288	263	260	-1.0
Total	29 440	30 251	27 185	-10.1

Note: Percentage change calculated from unrounded data.

in May 2023. The elevated level of prices reflects tight availability, due to below-average 2022 output as well as to conflict-related disruptions to markets. High prices of agricultural inputs and transport costs, also contributed to support prices. Overall, rice prices in May 2023 were more than double the already high levels of a year earlier.

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This brief was prepared using the following data/tools:

FAO/GIEWS Country Cereal Balance Sheet (CCBS)

<https://www.fao.org/giews/data-tools/en/>.

FAO/GIEWS Food Price Monitoring and Analysis (FPMA) Tool

<https://fpma.fao.org/>.

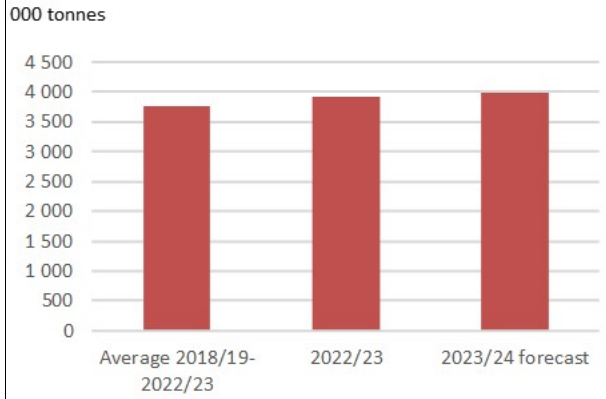
FAO/GIEWS Earth Observation for Crop Monitoring

<https://www.fao.org/giews/earthobservation/>.

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

Myanmar

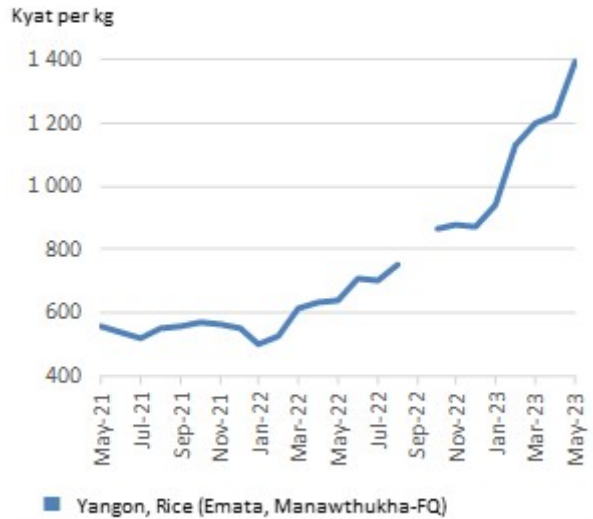
Cereals Exports



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

Myanmar

Wholesale prices of rice





GIEWS Country Brief Myanmar

Reference Date: 18-October-2022

FOOD SECURITY SNAPSHOT

- Below-average 2022 paddy production forecast
- Above-average cereal exports forecast in 2022/23
- Prices of rice at record high in August
- Persistent conflict continues to cause displacements

Below-average 2022 paddy output forecast

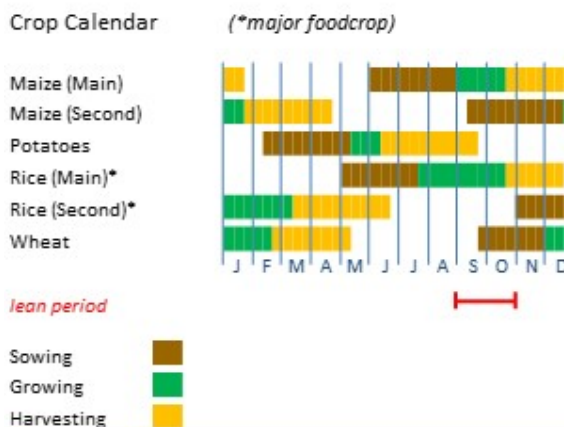
The 2022 main rainfed paddy crop, which accounts for more than 80 percent of the annual production, is approaching the harvest stage. Although drier-than-average conditions in late May and early June delayed planting operations in the central producing areas, the area sown to the main rice crop is estimated close to the five-year average. Precipitation amounts improved from late June and have been generally near-average until September. The total 2022 paddy production, including the secondary crops to be planted at the end of the year, is forecast at 23.8 million tonnes, about 10 percent below the five-year average level. Yields have been affected by limited use of critical agricultural inputs due to their elevated prices. According to a recent survey conducted by the [International Food Policy Research Institute \(IFPRI\)](#), domestic prices of urea and compound fertilizers in July 2022 were 90 and 75 percent, respectively, higher year-on-year, while prices of herbicides and pesticides increased by 50 and 40 percent, respectively.

The 2022 main maize crop, for harvest from late October, is growing under generally favourable weather conditions (ASI map). Total maize production, including the secondary crops to be planted in November, is forecast at an above-average level of 2.2 million tonnes, reflecting record area planted driven by robust export demand and high domestic prices. However, average yields are projected at the lowest level since 2015 as a result of constrained access to agricultural inputs, as well as pests and diseases.

Cereal exports in 2022/23 forecast at above-average level

Total cereal exports in the 2022/23 marketing year (July/June) are forecast at about 4.2 million tonnes, 15 percent above the average volume. Exports of maize are forecast at a record of 1.7 million tonnes, reflecting the expected production surplus and the steady demand from China (mainland) and Thailand. Rice exports in calendar year 2022 are forecast at 2.3 million tonnes.

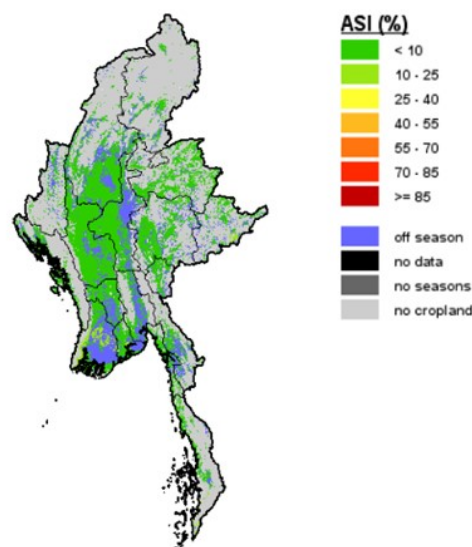
Myanmar



Source: FAO/GIEWS, FAO/WFP CFSAM 2009.

Myanmar - Agricultural Stress Index (ASI)

from start of season 1 to dekad 3, September 2022



Source: FAO/GIEWS Earth Observation System.

Prices of rice at record high in August

Domestic prices of “Emata” rice, a widely consumed quality, have steadily increased since January 2022 and reached record highs in August. The price increase was associated with consecutive seasons of production declines, a recovery in exports, high transportation and input costs, and expectations of a below-average production of 2022 main paddy crops. Prices in August were almost 50 percent higher than a year before.

Persistent conflict continues to cause displacements

According to the United Nations High Commissioner for Refugees (UNHCR), as of September 2022, the number of additional displaced people following the military takeover in February 2021 is estimated at 982 000, bringing the total number of internally displaced persons (IDPs) to about 1.3 million. Most IDPs reside in Rakhine, Chin, Kachin, Kayin and Shan states. Macroeconomic difficulties, due to lingering effects of the COVID-19 pandemic and political instability, have caused widespread loss of income and livelihoods, sharply reducing households’ purchasing power. Decreased production stemming from localized paddy crop losses, combined with the high prices of energy, fuel and essential food items, may cause a significant decline in output leading to a deterioration of food security outcomes in 2022/23.

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Myanmar

Cereal Production

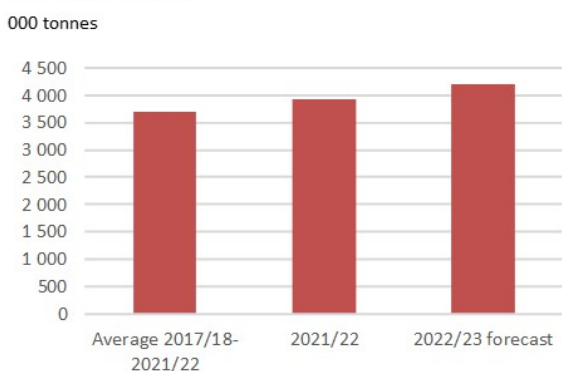
	2017-2021 average	2021	2022 forecast	change 2022/2021
	000 tonnes			percent
Rice (paddy)	26 400	24 857	23 750	-4.5
Maize	2 034	2 250	2 200	-2.2
Millet	165	150	145	-3.3
Others	289	263	257	-2.3
Total	28 888	27 520	26 352	-4.2

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Myanmar

Cereals Exports

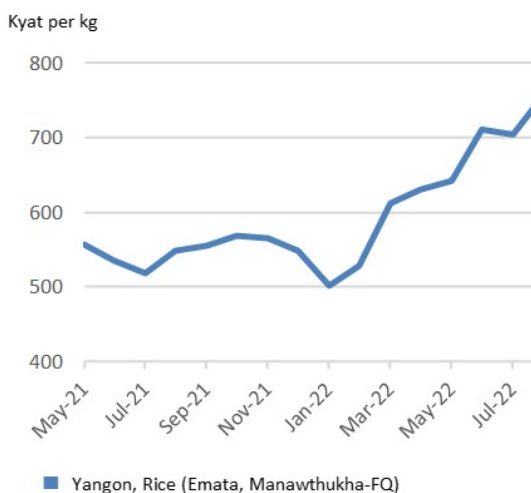


Notes: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Myanmar

Wholesale prices of rice



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



GIEWS Country Brief Myanmar

Reference Date: 03-August-2021

FOOD SECURITY SNAPSHOT

- Mixed start of 2021 monsoon season
- Rice exports in 2021 forecast to contract
- Persistent conflicts severely affect large numbers of people

Mixed start of 2021 monsoon season

Planting of the predominantly rainfed main season paddy crop, which accounts for more than 80 percent of the annual production, is nearing completion. Since its start in May, the monsoon season has been characterized by average to above-average precipitation amounts in the northern and southern main producing areas, benefitting planting activities and germination of crops. By contrast, in central rice producing areas, including Magwe, Mandalay and Sagaing regions and Shan State, well below-average rainfall amounts may have delayed planting operations and affected early crop development. Moisture deficits resulted in below-average vegetation conditions in June, raising concerns regarding crop yields. Farmers are reportedly planting more drought-resistant crops, such as oil seeds, in the areas affected by scarce precipitation. A further factor that has weighed on the production outlook this year is the political instability, which began on 1 February with the change of regime. The instability has caused disruptions to key supply chains and critical support services, including the banking system, and these impacts could curb production. The performance of the monsoon rains until the end of the season in October will be crucial for the final outcome.

Planting of the 2021 main maize crop started in June and is expected to finalize in August. Some delays have been reported in the central producing areas due to below-average rainfall amounts. Strong demand by the domestic feed industry and export markets, including China (mainland) and Thailand, are expected to encourage farmers to maintain an area planted that is above the five-year average.

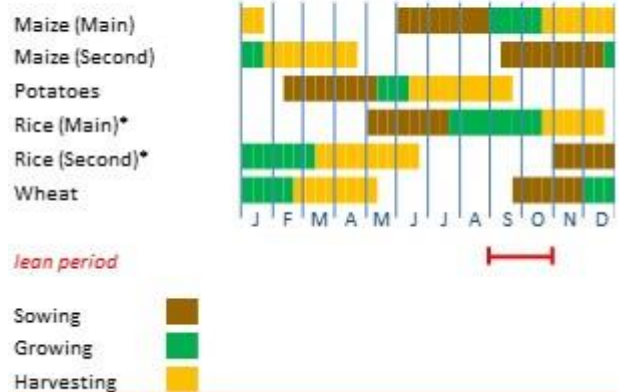
Rice exports in 2021 forecast to contract

Rice exports in calendar 2021 are forecast at 2 million tonnes, 11 percent below the 2020 level, reflecting reduced exportable availabilities due to the below-average output in 2020 and the disruption of international export services since 1 February 2021.

Myanmar

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FAO/WFP CFSAM 2009.

Myanmar

Cereal Production

	2016-2020 average	2020	2021 forecast	change 2021/2020
	000 tonnes			percent
Rice (paddy)	26 087	25 100	24 910	-0.8
Maize	2 022	2 400	2 300	-4.2
Sorghum	253	260	250	-3.8
Others	372	363	353	-2.8
Total	28 735	28 123	27 813	-1.1

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

The country also exports small quantities of maize. In the 2021/22 marketing year (July/June), maize exports are forecast to be close to the five-year average, reflecting the steady demand from China (mainland) and Thailand.

Persistent conflicts severely affect large numbers of people

Following the military take-over on 1 February 2021, increased tension and unrest are affecting the country. The current uncertain political conditions may further compromise the fragile situation of the vulnerable households already affected by COVID-19 pandemic disruptions. Armed conflict between the military and non-State armed groups led to population displacements, disrupted agricultural activities and limited access for humanitarian support especially in Rakhine, Chin, Kachin, Kayin, Kayah and Shan states. According to the latest data from the United Nations Office for the Coordination of Humanitarian Affairs (OCHA), in June 2021, an estimated 177 500 people had been forced to flee their homes in southern parts of the country due to conflicts since February. Most of the internally displaced people are suffer high levels of food insecurity as the conflict is hampering the delivery of adequate humanitarian assistance and impending the restoration of local livelihoods. Income losses due to the impact of the COVID-19 pandemic have already had a severe and adverse impact on the food security situation of the vulnerable households. In addition, the monsoon season, with recurrent heavy downpours or flooding, adds another layer of risk.

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GIEWS Country Brief Myanmar

Reference Date: 11-September-2020

FOOD SECURITY SNAPSHOT

- Main paddy crop area in 2020 estimated at an above-average level
- Aggregate cereal production in 2019 estimated close five-year average
- Exports of rice in 2020 forecast at above-average level
- Wholesale prices of “Emata” rice in August were well above year-earlier levels
- Persistent conflicts and economic constraints due to COVID-19 pandemic severely affect large number of people

Main paddy crop area in 2020 estimated at an above-average level

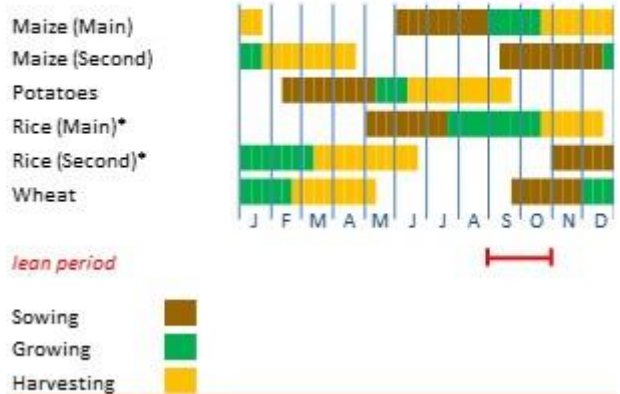
Planting of the 2020 predominantly rainfed main season paddy crop, which accounts for more than 80 percent of the annual production, started with a slight delay due to below-average monsoon rains in May and June. Starting from the first dekad of July, precipitations were generally near the average in the northern parts of the country, benefitting the planting and germination of the crops. By contrast, in parts of central and southern rice producing areas, rains remained below average throughout July, affecting early crop development. In particular, below-normal vegetation conditions, as of July, were reported in Rakhine, Eastern Shan, Kayin and Mon states, and in Magway and Bago regions, raising concerns on the impact of dry weather conditions on yields. Rains were above average from the first dekad of August, bringing some relief to the areas affected by dry weather conditions and allowed planting operations to progress. Overall, the area planted is forecast at an above-average level, supported by strong domestic demand and the effects of the official programmes promoting rice production.

Planting of the 2020 main maize crop was completed at the end of August. Below-average rains in June and July in key producing areas, including Shan State and Sagain Region, caused some delays to planting operations. Improved rains from the first dekad of August allowed planting operations to pick up. The area planted is expected at an above-average level, as farmers prefer maize crop due to strong demand from the domestic feed market. Some concerns exist due to localized damages caused by Fall Armyworm (FAW).

Myanmar

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FAO/WFP CFSAM 2009.

Myanmar

Cereal Production

	2014-2018 average	2018	2019 estimate	change 2019/2018
	000 tonnes			percent
Rice (paddy)	26 340	26 100	25 600	-1.9
Maize	1 836	2 000	2 200	10.0
Sorghum	247	250	260	4.0
Others	401	393	393	0.0
Total	28 824	28 743	28 453	-1.0

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Aggregate cereal production in 2019 estimated close five-year average

The 2019 season was completed at the end of June 2020. The aggregate cereal output is estimated at 28.5 million tonnes, close to the five-year average.

Rice exports in 2020 forecast at above-average level

Rice exports in 2020 are forecast at an above-average level of 2.6 million tonnes, due to ample exportable availabilities. The country exports also small quantities of maize. In the 2020/21 marketing year (July/June), maize exports are forecast at 1.4 million tonnes, close to the previous record level, reflecting the continuing strong demand from China (mainland).

Wholesale prices of “Emata” rice at high levels in August 2020

Wholesale prices of “Emata” rice (also known as “Indica” rice), the most consumed variety in the country, have generally increased between March and August 2020, supported by strong domestic demand during the COVID-19 pandemic. Overall, in August 2020, the prices of rice were above their year-earlier levels.

Persistent conflicts and economic constraints due to COVID-19 pandemic severely affect large number of people

Persistent conflicts in Rakhine, Chin, Kachin, Kayin and Shan states have triggered large-scale population displacement since 2017. As of June 2020, an estimated 235 000 people, mostly women and children, were reported to be internally displaced, sheltering mainly in Rakhine and Kachin states. Most IDPs are experiencing high levels of food insecurity, with the COVID-19 restrictions on movements hampering an adequate delivery of humanitarian assistance. In addition, income losses and a decline in the remittances due to the impact of COVID-19 is expected to affect the food security situation of most vulnerable households. The impact of the COVID-19 pandemic has been also severe on agricultural households relying on international markets to export high value commodities. This is the result of decreasing international demand and limited access to the international markets, following cross-border movement restrictions, especially in the areas along the borders.

Food security remains a concern for an estimated 860 000 refugees from Myanmar, who sought refuge in Cox's Bazar District in Bangladesh.

COVID-19 and measures adopted by the Government

In late March 2020, in order to contain the spread of the COVID-19 pandemic, the Government implemented several measures, including movement and travel restrictions, the closure of educational institutions and the countrywide ban on all forms of mass gatherings. The transportation of goods and agricultural activities has been authorized to continue in order to ensure adequate market availabilities.

The Government implemented a MMK 200 billion (about USD 140 million) COVID-19 plan to provide loans at reduced interest rates to the affected businesses.

On 26 June 2020, the International Monetary Fund approved a USD 356.5 million Emergency Assistance Package to address the urgent financial needs as a result of COVID-19.

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GIEWS Country Brief Myanmar

Reference Date: 19-July-2019

FOOD SECURITY SNAPSHOT

- After late start, near-average monsoon rains facilitated plantings and early crop development
- Rice exports in 2019 forecast at above-average level
- Wholesale prices of “Emata” rice increased seasonally in June but remained below last year’s levels
- Persistent conflicts severely affect large numbers of people

After late start, near-average monsoon rains facilitated plantings and crop development

Planting of the predominantly rainfed main season paddy crop, which accounts for more than 80 percent of the annual production, normally starts in May, with the onset of the monsoon rains, and continues until July.

In 2019, the monsoon rains started in the second dekad of June, almost three weeks later than the normal onset. Since then, near-average rainfall favoured planting operations and improved vegetation conditions of germinating crops in the main paddy producing areas. Between May and June, well below-average rains were reported in some important rice producing areas, including Sagaing and Mandalay regions (both located in the central dry zone and in part irrigated) and Shan State. Rainfed parts in these areas have already exhibited below-normal vegetation conditions, raising concerns on the impact on yield potential (see VHI map). A short period of torrential rains in the first dekad of July increased river levels, causing flooding and minor crop losses in localized areas of Kachin, Rakhine, Chin and Mon states, and Bago and Sagain regions. Overall, the area planted is estimated to be close to the previous year’s high level supported by strong domestic demand and the effects of the official programmes promoting rice production. The 2019 secondary season crops, for harvest in the second quarter of 2020, will be planted at the end of the year.

Planting of the 2019 main maize crop started in June and is expected to continue until August. Below-average rains in June in key producing areas, including Shan State and Sagain Region, caused some delays to planting operations. However, if rains improve in the next weeks, it is still possible that planted area reaches the previous year’s high level. Maize is expected to be a preferred crop by farmers due to strong demand from the domestic feed market and from China (Mainland). Some concerns exist due to localized damages caused by Fall

Myanmar

Crop Calendar (*major foodcrop)



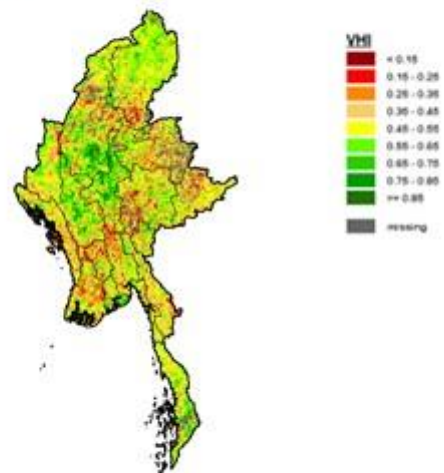
lean period

Sowing
Growing
Harvesting

Source: FAO/GIEWS, FAO/WFP CFSAM 2009.

Myanmar - Vegetation Health Index (VHI)

June 2019



Source: FAO/GIEWS Earth Observation System.

Armyworm (FAW). According to the latest information from Myanmar's Plant Protection Division, so far, the FAW affected only 5 200 hectares or about 1 percent of the 2019 main crop, mostly in Shan State and Bago and Sagaing regions.

Rice exports in 2019 forecast at above-average level

Rice exports in 2019 are forecast at 2.4 million tonnes, well above the five-year average, on expectations of ample exportable availabilities.

The country exports also small quantities of maize. In the 2019/20 marketing year (July/June), maize exports are forecast to be close to the previous record level, reflecting the continuing strong demand from China (Mainland).

Wholesale prices of "Emata" rice increased seasonally in June

Wholesale prices of "Emata" rice (known as "Indica" rice), the most consumed variety in the country, registered steady declines between March and May 2019, weighed by the 2018 bumper harvests and lower demand for exports. In June, prices increased by 6 percent in line with seasonal trends, reflecting tightening market availabilities. Overall, in June, prices were below their year-earlier levels.

Persistent conflicts severely affect large numbers of people

Persistent conflicts since the resurgence of violence in Rakhine State in late August 2017 triggered large-scale population displacement. According to the latest data from UNOCHA (May 2019), an estimated 160 000 people were internally displaced in Rakhine State and 106 500 in Kachin and northern Shan states. In Rakhine State, the livelihoods of the affected population have been further exacerbated by limitations of movement. In addition, as of May 2019, an estimated 910 000 refugees from Myanmar sought refuge in Cox's Bazar District in Bangladesh due to the ongoing conflict. Most IDPs are affected by high levels of food insecurity as the conflict is hampering the delivery of adequate humanitarian assistance and impending the restoration of local livelihoods. The July floods affected large numbers of people, displaced at least 21 000 individuals, resulted in losses of stored crops and seeds as well as small livestock.

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Myanmar

Cereal Production

	2014-2018 average	2018	2019 forecast	change 2019/2018
	000 tonnes			percent
Rice (paddy)	28 884	30 400	30 500	0.3
Maize	1 955	2 300	2 400	4.3
Sorghum	247	250	260	4.0
Others	398	383	363	-5.2
Total	31 483	33 333	33 523	0.6

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.



GIEWS Country Brief Afghanistan

Reference Date: 02-October-2018

FOOD SECURITY SNAPSHOT

- Paddy production forecast to increase in 2018 driven by higher expected plantings
- Rice exports in 2019 forecast to increase
- Wholesale prices of *emata* rice resume increases and remain higher year-on-year
- Conflicts and floods severely affect large numbers of people

Paddy production increases in 2018 driven by higher expected plantings

The bulk of the 2018 main paddy crop was sown by July. Rainfall levels in the monsoon season, which started in June, have been adequate throughout the country, benefitting crop development. Nevertheless, strong downpours have caused localized floods and landslides in the states of Kayin, Mon, Shan and Rakhine, and in the regions of Bago, Magway, Sagaing and Tanintharyi, negatively impacting on some crop areas and farm operations. However, the impact over the total output is estimated to be marginal.

The aggregate 2018 paddy output is forecast to increase to 30.4 million tonnes, slightly above last year's level reflecting an expansion in plantings driven by expectations of increases in local quotations. Additionally, schemes geared at raising access to credit and ensuring remunerative prices for farmers were also launched this year. Nevertheless, the final result of the season will depend on weather conditions during the remaining growing stages of the main crop cycle and the outcome of the secondary crop to be planted as of November.

The 2018 maize crop, already harvested by April is estimated to remain constant year-on-year at 1.9 million tonnes, as expectations of demand from China and the domestic feed market, mostly poultry, are stable.

Rice exports in 2019 forecast to increase

Rice exports in calendar year 2019 are forecast at 3.2 million tonnes, 12 percent higher than their previous year's level and well above the five-year average, reflecting expectations of ample exportable availabilities and competitive prices.

Myanmar

Crop Calendar (*major foodcrop)



lean period

Sowing
Growing
Harvesting

Source: FAO/GIEWS, FAO/WFP CFSAM 2009.

Myanmar

Cereal Production

	2013-2017 average	2017	2018 forecast	change 2018/2017
	000 tonnes			percent
Rice (paddy)	28 468	29 470	30 400	3.2
Maize	1 755	1 900	1 900	0.0
Sorghum	243	250	250	0.0
Others	410	403	403	0.0
Total	30 876	32 023	32 953	2.9

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Wholesale prices of *emata* rice increase and remain higher year-on-year

Wholesale prices of *emata* rice, the most consumed variety in the country, continued to increase in August ahead of the main harvest in October and were well above their year-earlier levels supported by strong demand and high general inflation.

Conflicts and floods severely affect large numbers of people

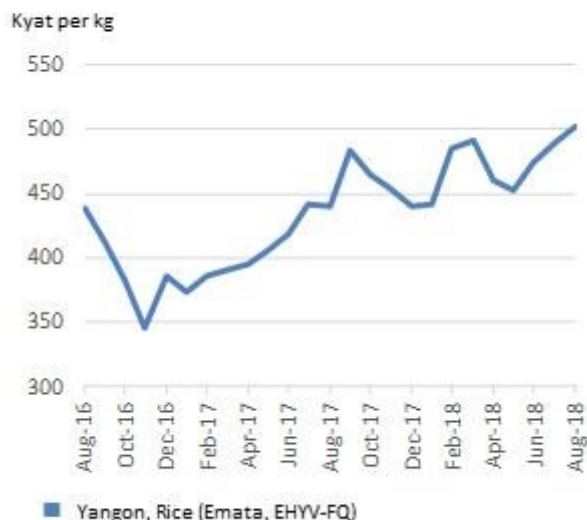
The country is prone to floods and landslides during the monsoon season spanning between June and October, which affect large numbers of people every year. According to official estimates, since early June, excessive rains have caused localized floods and landslides, mainly in the states of Kayin, Mon, Shan and Rakhine, and in the regions of Bago, Magway, Sagaing and Tanintharyi. Reports indicate damages to housing units, roads, schools and hospitals, which largely hamper the quick and effective rollout of humanitarian response as well as disrupt the availability and access to food for the affected populations.

Conflicts in parts of the country triggered large-scale population displacement; according to the latest data from the International Organization of Migration (June 2018), an estimated 919 000 refugees from Myanmar sought refuge in Cox's Bazar District in Bangladesh. In addition 241 000 people were internally displaced in Kachin, Kayin, Shan and Rakhine states due to ongoing conflict. Humanitarian aid is strongly required in these areas to assist the food security and meet the basic needs of all affected people.

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Myanmar

Wholesale prices of rice



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



GIEWS Country Brief Myanmar

Reference Date: 25-August-2017

FOOD SECURITY SNAPSHOT

- Prospects for 2017 main season paddy crop are favourable, despite impact of floods
- Rice exports in 2017 forecast to increase to record level
- Prices of rice have increased since beginning of 2017, supported by increased export sales
- Floods for third consecutive year severely affect large numbers of people

Prospects for 2017 main season paddy production are favourable despite floods

The 2017 main (wet) season paddy crop, which accounts for the bulk of annual production, is currently at the vegetative to early productive growth stage. The monsoon rains were generally close to average over most of the country, benefitting planting activities and early crop development. However, heavy rainfall in July caused localized flooding across southern and central parts of the country, particularly affecting Magway, Sagaing, Bago and Ayeyarwady regions and Mon State. The floods damaged standing crops, particularly paddy in low-lying areas, but the impact on the overall output is expected to be minimal. On the other hand, the abundant rains are likely to benefit crop growth in other areas of the country.

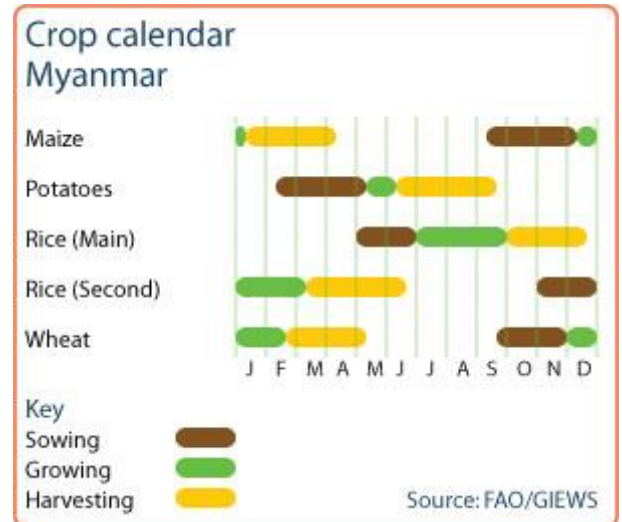
Assuming normal growing conditions for the remainder of the season, the 2017 aggregate paddy output is forecast at 28.9 million tonnes, 1 percent above the estimated levels for 2016.

The 2016 maize crop, with the bulk harvested by April, is estimated at 1.8 million tonnes, 6 percent up from the high level of last year. This reflects an increase in both plantings, driven by strong import demand from neighbouring China, and yields, as a result of favourable weather conditions.

Rice exports in 2017 forecast to increase to record level

FAO forecasts rice exports in the 2017 calendar year at 1.8 million tonnes, almost 30 percent above last year's reduced level and a record high, owing to adequate exportable availabilities and competitive prices.

Prices of rice increase since the beginning of



Myanmar Cereal production

	2012-2016 average	2016	2017 forecast	change 2017/2016
	000 tonnes			percent
Rice (paddy)	28 047	28 530	28 880	1
Maize	1 473	1 700	1 800	6
Wheat	199	200	200	0
Others	199	200	200	0
Total	29 918	30 630	31 080	1

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

2017, supported by increased export sales

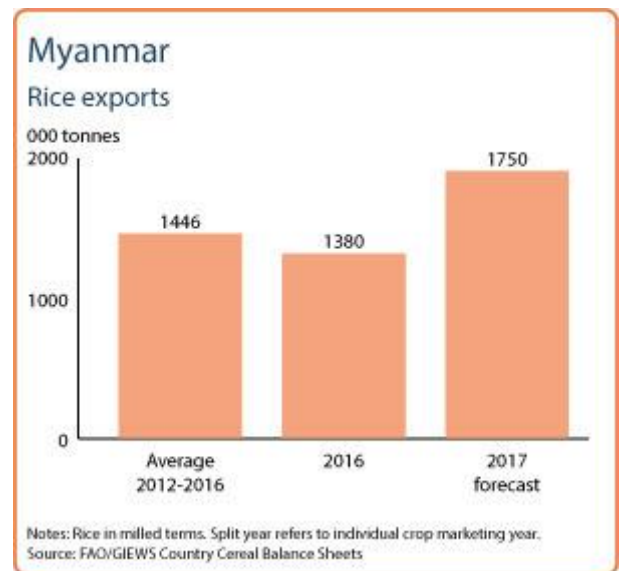
Wholesale prices of *emata* rice, the most consumed variety, have been increasing since the beginning of 2017, mainly supported by increased purchases from abroad.

Floods for third consecutive year severely affect large numbers of people

The country is prone to floods during the monsoon season, which normally affect large numbers of people. According to official estimates, floods in July 2017 adversely affected at least 200 000 people, mostly in Magway, Sagaing, Bago and Ayeyarwady regions and Mon State. Reports indicate damage to housing and infrastructure, including roads and bridges, as well as losses of stored food and livestock. This coupled with disruptions to internal trade, constrained availability of and access to food in the most affected areas.

According to OCHA, as of June 2017, over 525 000 people (including 220 000 IDPs), mostly concentrated in Rakhine, Kachin and Shan states, require humanitarian aid to meet their basic needs.

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GIEWS Country Brief Myanmar

Reference Date: 21-December-2016

FOOD SECURITY SNAPSHOT

- Favourable prospects for 2016/17 early season crops
- Rice production in 2016 forecast to recover
- Rice exports in 2016 forecast to decrease
- Prices of rice have decreased sharply in recent months
- Floods for second consecutive year severely affected large number of people

Favourable weather conditions at start of 2016/17 early cropping season

Planting of the 2016/17 early season maize and irrigated wheat is nearing completion while planting of the irrigated secondary paddy crop will continue until February. Normal monsoon rains boosted soil moisture and improved water availabilities for irrigation, benefitting sowing and the establishment of early-planted crops. Assuming favourable weather conditions prevail during the season, the early production outlook for the ongoing crops is positive.

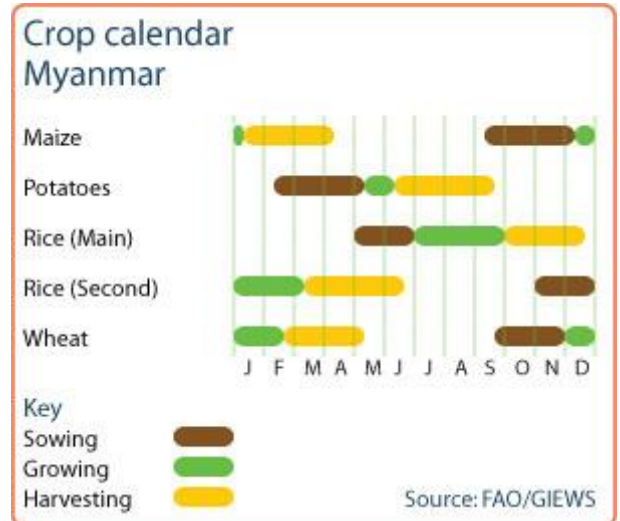
Rice production in 2016 forecast to recover from last year's reduced level

Harvesting of the 2016 main (monsoon) paddy crop, which accounts for 85 percent of the annual production, is nearing completion. Despite early season dryness and recurrent localized flooding between June and August in Ayeyarwady, Bago, Sagaing regions and in Chin and Rakhine states, growing conditions for the paddy crop were overall favourable. On expectations that more conducive growing conditions will promote gains in the main and secondary crop, FAO forecasts the 2016 aggregate paddy production to recover from last year's flood-reduced level by 2 percent to 28 million tonnes.

The 2016 maize crop, harvested by April, is estimated by FAO at 1.6 million tonnes, some 3 percent above last year's good level, mainly reflecting an expansion in plantings, supported by high demand from neighbouring China.

Rice exports in 2016 forecast to decrease

FAO forecasts rice exports in calendar 2016 at 1.2 million tonnes, 30 percent below last year's level, owing to the Government of China's efforts to limit informal inflows of rice across borders.



Myanmar Cereal production

	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Rice (paddy)	28 143	27 488	28 000	2
Maize	1 383	1 550	1 600	3
Wheat	196	200	200	0
Others	199	200	200	0
Total	29 921	29 438	30 000	2

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

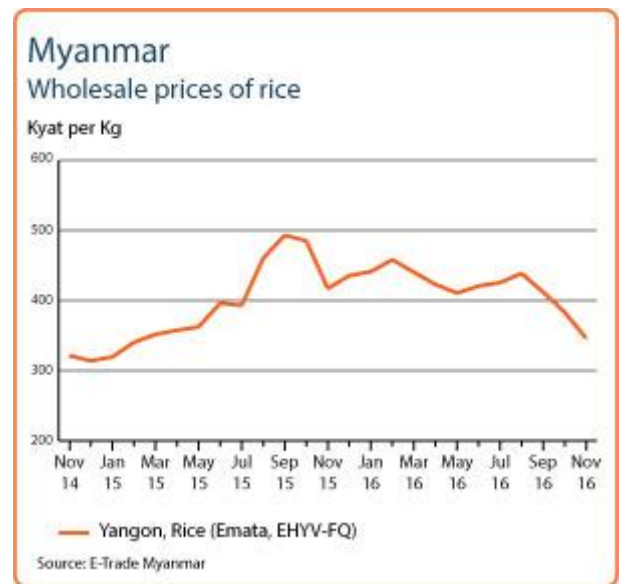
Prices of rice have decreased sharply in recent months

Wholesale prices of *Emata* rice, the most consumed variety, declined sharply for the third consecutive month in November, on account of improved supplies from the ongoing 2016 main season harvest and weak demand for export. Prices in November were 20 percent below their high levels a year-earlier.

Floods for second consecutive year severely affected large number of people

According to official estimates, recurrent floods between June and August 2016 adversely affected at least 500 000 people, mostly in Ayeyarwady, Bago, Magway, Mandalay, Sagaing regions and Chin and Rakhine states. The same areas were also impacted by the severe floods and landslides in July and August in 2015.

The recent escalation of the conflict and insecurity in the northern part of Maungdaw Township in Rakhine State (situated on the western coast), caused at least 30 000 new displacements. According to OCHA, as of early December, over 525 000 people (including 220 000 IDPs), mostly concentrated in Rakhine, Kachin and Shan states, require humanitarian aid to meet their basic needs.





GIEWS Country Brief Myanmar

Reference Date: 25-July-2016

FOOD SECURITY SNAPSHOT

- Early outlook favourable for 2016 main paddy crop
- Rice exports in 2016 expected close to last year's level
- Prices of rice decreased in early July, but remain high
- Floods for second consecutive year severely affected large number of people, especially in Chin and Rakhine states

Early outlook favourable for 2016 main paddy crop

Planting of the 2016 main (monsoon) paddy crop, which accounts for 85 percent of the annual production, is ongoing. The monsoon rains started on time in late May and progressed generally well over most of the country, benefiting planting activities and early crop development. Excessive precipitation in parts of Ayeyarwady, Bago, Sagaing regions and in Chin and Rakhine states triggered localized flooding in early June, but the impact on early-planted crops is expected to be minimal overall. Assuming normal growing conditions prevail, FAO forecasts 2016 aggregate paddy production to recover from last year's flood-reduced level by 2 percent to 28 million tonnes.

Paddy production declined in 2015

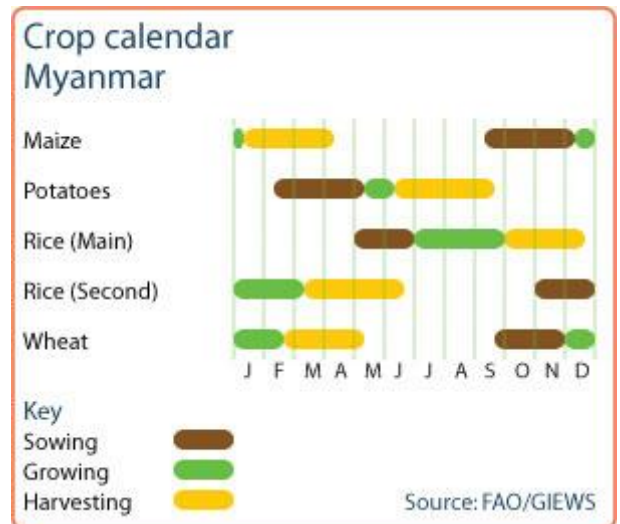
FAO estimates the 2015 aggregate paddy output at 27.5 million tonnes, 3 percent below the 2014 already reduced level. The decrease mainly results from a smaller main season harvest, negatively affected by floods in July and August 2015.

Rice exports in 2016 expected close to last year's level

Amid prospects of reduced demand from key buyers, namely China, FAO forecasts rice exports in calendar year 2016 at 1.6 million tonnes, close to last year's reduced level and below the 2014 record.

Prices of rice decreased in early July, but remain high

Wholesale prices of *Emata* rice, the most consumed variety, decreased in early July, with supplies from the 2015/16 secondary season crop entering the markets. Lower demand from China, the country's main importer in recent years, also



Myanmar Cereal production

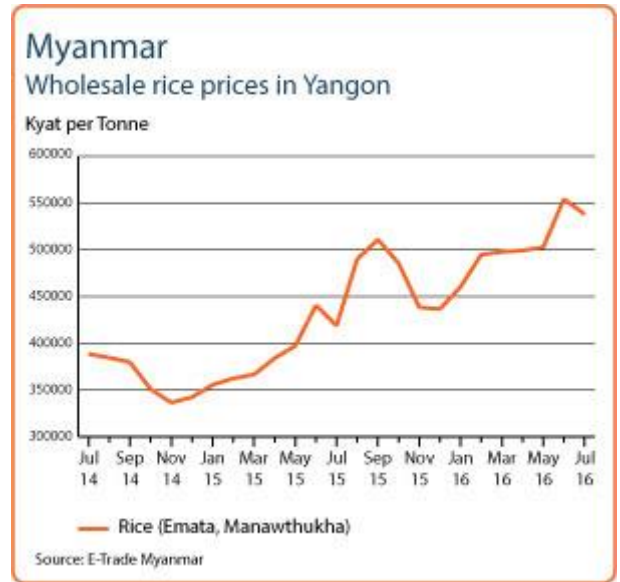
	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Rice (paddy)	28,143	27,488	28,000	2
Maize	1,327	1,267	1,400	10
Wheat	196	200	200	0
Others	199	200	200	0
Total	29,865	29,155	29,800	2

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

weighed on prices. Overall, however, prices remained well above their year-earlier levels after sustained increases since the beginning of the year, mainly because of tighter domestic supplies.

Floods for second consecutive year severely affected large number of people, especially in Chin and Rakhine states

According to official estimates, floods in June 2016 adversely affected at least 26 000 people, mainly in Ayeyarwady, Bago, Sagaing regions and Chin and Rakhine states. The same areas were also impacted by the severe floods and landslides in July and August last year. Particularly affected are Chin and Rakhine states, where highly vulnerable populations have not yet recovered from the 2015 floods.



Reference Date: 10-August-2015

FOOD SECURITY SNAPSHOT

- Severe flooding causes damage to rice crops, particularly in western and northern parts of the country
- Prices of rice decreased in July but remained at high levels
- Floods severely affect food security of large number of people, mainly in western provinces

Severe flooding causes damage to rice crops, particularly in western and northern parts of the country

The 2015 main (wet) season rice crop, which accounts for the bulk of annual production, is currently at the vegetative to early reproductive growth stage. After below-average rains from May to June, the monsoon rains increased significantly from mid-July and were further intensified by Cyclone Komen on 30 July, which caused severe flooding and devastation across the country. Hardest hit were western and northern parts, including Rakhine State, Chin State, Sagaing Region and Magway Region, which were officially declared natural disaster affected zones on 31 July. The full extent of damage to agriculture has not yet been assessed but the Ministry of Agriculture and Irrigation estimates that some 210 000 hectares (or 3 percent of the total area) of standing paddy crop have been negatively affected. Prior to the floods, the 2015 aggregate paddy production, including the ongoing 2015 main and the forthcoming 2015/16 secondary season, was forecast by FAO at 29.2 million tonnes. This figure may have to be revised downward somewhat once the extent of the flood damage is better known but overall annual output could remain about average.

The 2015 maize crop, harvested in April, is estimated at a record level of 1.8 million tonnes, 3 percent up from the already bumper level in 2014. This mainly reflects an expansion in plantings in response to higher demand from the domestic feed industry and from neighbouring China.

Total cereal imports (mainly wheat) for 2015/16 are forecast to remain close to last year's level of 285 000 tonnes.

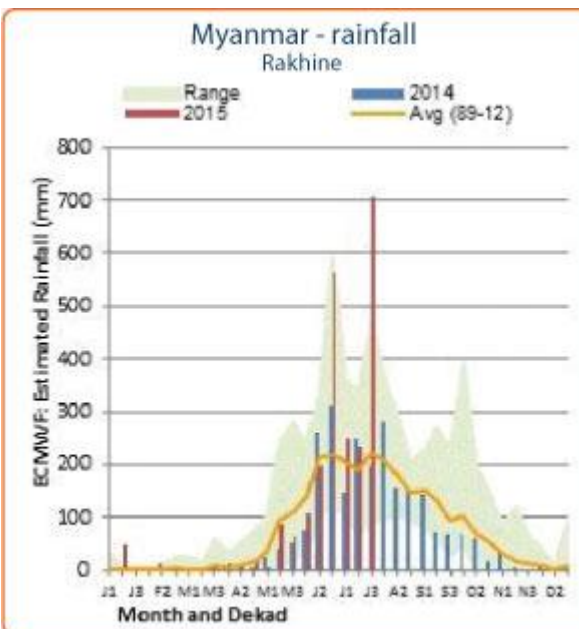
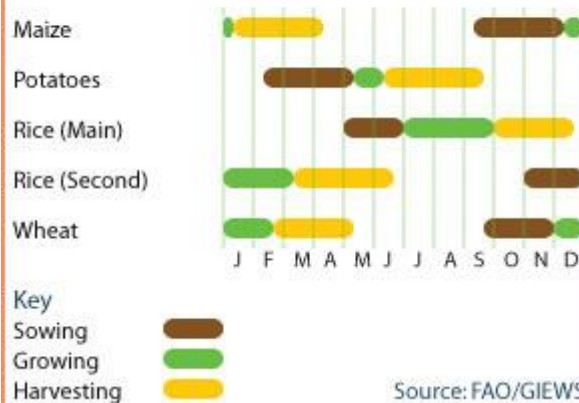
Prices of rice decreased in July but remained high

Wholesale prices of Emata rice, the most commonly consumed variety, decreased in July with the arrival of the 2014/15 second season harvest but remained above their year-earlier levels in July, after sustained increases in the previous months due to strong import demand from China, supported by the depreciation of the national currency.

Floods threaten food security of large number of people, mainly in western and northern provinces

According to latest official information, as of 5 August, over 260 000 people, mainly in the western and northern parts of the country, have been severely affected by the recent floods. These numbers are expected to increase as more information becomes available. Flood-affected communities include also previously displaced people in Rakhine State. Severe damage to housing and infrastructure, including roads,

Crop calendar Myanmar



Myanmar Cereal production

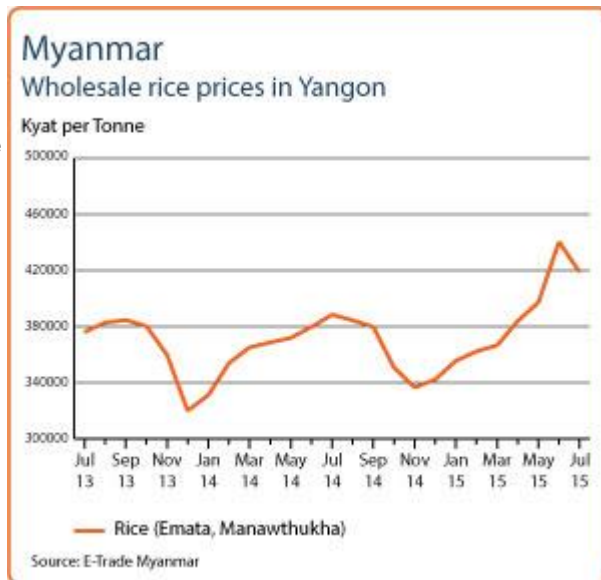
	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes			percent
Rice (paddy)	29 303	28 900	29 200	1
Maize	1 510	1 800	1 900	6
Millet	185	185	187	1
Others	195	193	203	5
Total	31 194	31 078	31 490	1

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

bridges, railway lines as well as irrigation and drainage canals, has also been reported. In addition, losses of stored food and livestock are likely to be high in the most affected areas, and coupled with disruption to internal trade, availability and access of food is expected to be severely constrained, resulting in a deterioration in the food security situation of the affected population.

The Government is providing food, building materials and essential relief items. Myanmar has appealed for international assistance to help provide food, temporary shelters and clothes for the most affected populations.

According to the International Displacement Monitoring Centre, as of March 2015, some 662 400 people remained displaced in Rakhine State, Chin State, Sagaing Region and Magway Region, following recurrent inter-communal tensions since June 2012.



Reference Date: 08-May-2015

FOOD SECURITY SNAPSHOT

- Planting of 2015 main season rice underway
- Cereal exports forecast to increase in 2014/15 marketing year (July/June)
- Prices of rice increase in April
- Food insecurity remains a concern in some areas

Planting of 2015 main season rice crop began under favourable weather conditions

Planting of the 2015 main (wet) season rice crop, which accounts for about 80 percent of the annual production, is currently underway under favourable weather conditions. Tentative forecast of the the 2015 aggregate paddy harvest, including the secondary season paddy crop for harvest in early 2016, is put at 29.2 million tonnes, close to the average.

The 2015 maize production, harvested by mid-April, is put at a record level of 1.8 million tonnes, 3 percent up from the 2014 bumper crop. A slight expansion in plantings is estimated in response to higher demand from the domestic feed industry and from neighbouring China.

Below-average 2014 rice production

Aggregate 2014 paddy output (including the 2014 main season harvested last December and the 2014/15 secondary season being harvested) is estimated at 28.9 million tonnes, slightly above the previous year but 5 percent below the previous five-year average. The estimated increase is mainly attributed to a small expansion in the planted area from 2013's low level and an expected slight improvement in yields.

The 2014 maize crop, just harvested, is estimated at 1.75 million tonnes, some 3 percent above the bumper level in 2013.

Cereal exports forecast to increase in 2014/15 marketing year

Cereal exports for the 2014/15 marketing year (July/June) are forecast at 1.4 million tonnes (comprising about 760 000 tonnes of rice and about 610 000 tonnes of maize), 9 percent up from the previous year's high level. Total cereal imports (mainly wheat) for 2014/15 are projected to remain close to last year's level of 285 000 tonnes.

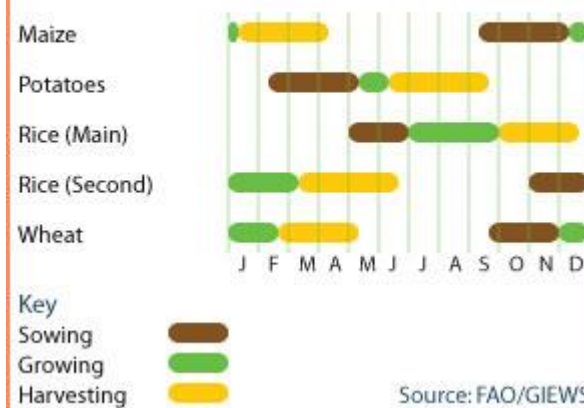
Prices of rice increased for the fifth consecutive month in April

Wholesale prices of *Emata* rice, the most commonly consumed variety, rose for the fifth consecutive month in April underpinned by strong border trade with China. Overall, prices were above their levels of a year earlier.

Food insecurity remains a concern in some areas

Despite an overall stable food security situation, recurrent inter-

Crop calendar Myanmar

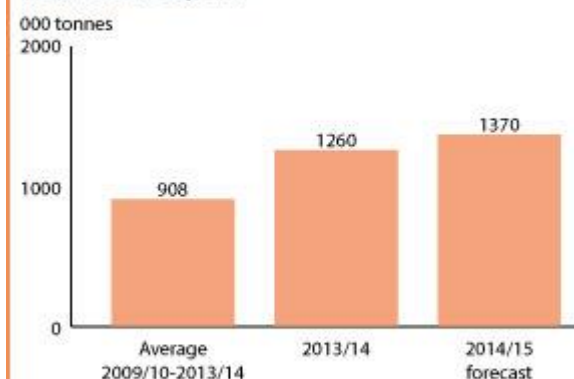


Myanmar Cereal production

	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes			percent
Rice (paddy)	29 303	28 900	29 200	1
Maize	1 500	1 750	1 800	3
Millet	185	185	187	1
Others	195	193	198	3
Total	31 184	31 028	31 385	1

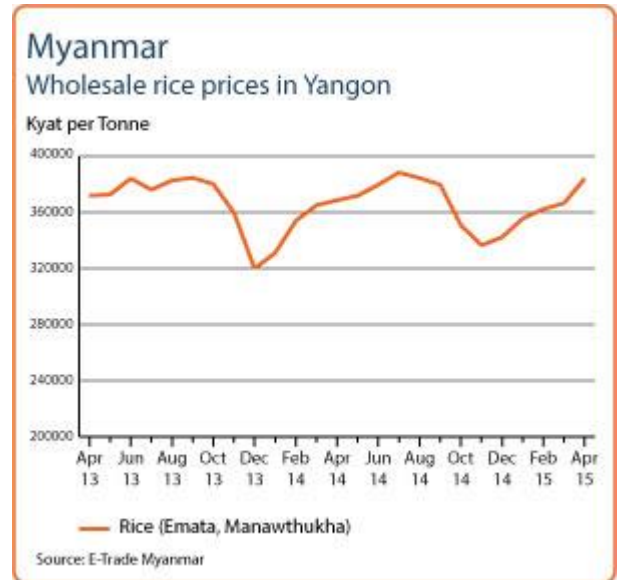
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Myanmar Total cereal exports



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

communal tensions since June 2012 have negatively impacted the food security situation of the affected populations. According to the latest information from UNHCR fresh displacements were witnessed in 2014, particularly after clashes in Kachin (north) and northern Shan (east) states. UNHCR estimates that as of July 2014, nearly half a million people remained displaced in Rakhine (southwest), Kachin (north), Shan (east) and southeast areas of Myanmar.



Reference Date: 10-March-2015

FOOD SECURITY SNAPSHOT

- Rice production in 2014 forecast at good level
- Cereal exports forecast to increase in 2014/15 marketing year (July/June)
- Prices of rice rose slightly in February and were marginally above their levels of a year earlier
- Food insecurity remains a concern in some areas

Rice production in 2014 forecast at good level

Harvesting of the 2014/15 secondary season paddy and main maize crops is currently ongoing. Near-average rains over large parts of the country from October to the end of February, including the main cereal producing regions of Ayeyarwady, Bago and Yangon, benefited crop development. FAO's latest forecast puts the aggregate 2014 rice production at 28.9 million tonnes, 2 percent up from the previous year, but below the estimated five-year average. The estimated increase is mainly attributed to a small expansion in the planted area from 2013's low level and an expected small improvement in yields. The 2014 maize crop, harvested by mid-April, is estimated by FAO at 1.75 million tonnes, some 3 percent above the record level in 2013.

Cereal exports forecast to increase in 2014/15 marketing year

Cereal exports for the 2014/15 marketing year (July/June) are forecast at 1.4 million tonnes (comprising about 800 000 tonnes of rice and about 610 000 tonnes of maize), 13 percent up from the previous year's high level. Total cereal imports (mainly wheat) for 2014/15 are projected to decrease slightly to 285 000 tonnes.

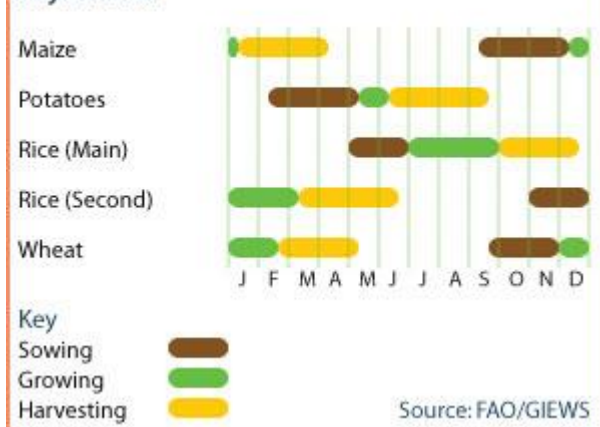
Prices of rice increased slightly in February and were marginally above their year-earlier levels

Wholesale prices of *Emata* rice, the most commonly consumed variety, increased slightly in February supported by strong import demand from China. Overall, prices were marginally above their levels of a year earlier.

Food insecurity remains a concern in some areas

Despite an overall stable food security situation, recurrent inter-communal tensions since June 2012 have negatively impacted on the food security situation of affected populations. According to the latest information from UNHCR fresh displacements were witnessed in 2014, particularly after clashes in Kachin (north) and northern Shan (east) states. UNHCR estimates that as of July 2014, nearly half a million people remained displaced in Rakhine (southwest), Kachin (north), Shan (east) and southeast areas of Myanmar.

Crop calendar Myanmar

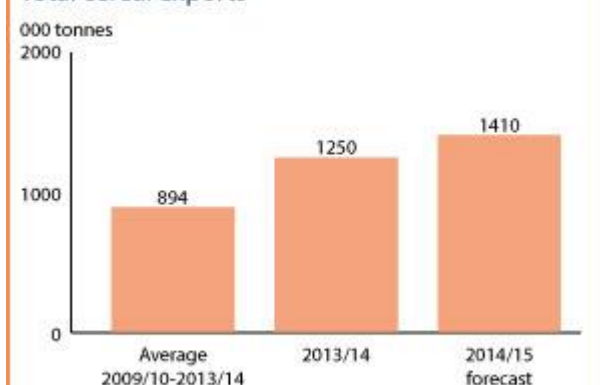


Myanmar Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes		percent	
Rice (paddy)	30 060	28 322	28 900	2
Maize	1 390	1 700	1 750	3
Millet	185	185	185	0
Others	195	193	193	0
Total	31 830	30 400	31 028	2

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

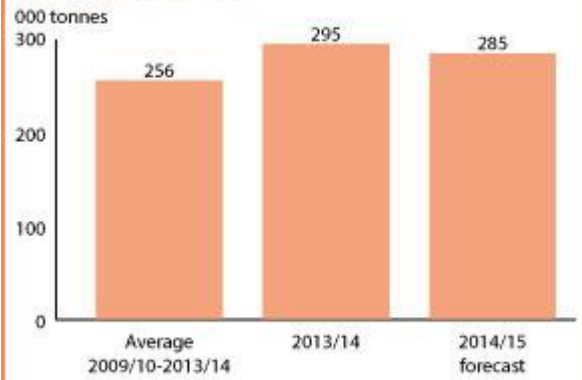
Myanmar Total cereal exports



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

Myanmar

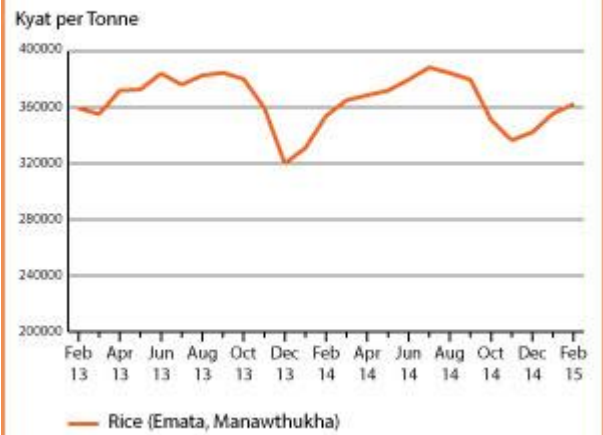
Total cereal imports



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

Myanmar

Wholesale rice prices in Yangon



Source: E-Trade Myanmar

Reference Date: 19-September-2014

FOOD SECURITY SNAPSHOT

- The 2014 rice production is forecast at a good level
- Cereal exports forecast to increase in the 2014/15 marketing year (July/June)
- Prices of rice softened somewhat in August and were close to their levels of a year earlier
- Food insecurity remains a concern in some areas

The 2014 rice production is forecast at a good level

Harvesting of the 2014 main (wet) season rice crop, which accounts for about 80 percent of annual production, is expected to start at the beginning of October and continue into December. FAO forecasts the aggregate 2014 rice production at 29.5 million tonnes, 3 percent up from last year but still remains slightly below the five-year average. The increase is mainly attributed to a small expansion in planted area from last year's low level.

FAO's latest estimates puts the 2014 maize production, harvested by mid-April, at a record level of 1.8 million tonnes, 3 percent up from the 2013 bumper crop. This reflects a slight expansion in planted area, in response to higher demand from the domestic feed industry and from neighbouring China, as well as higher yields, following favourable rainfall and adequate input supply during the growing season.

Cereal exports forecast to increase in the 2014/15 marketing year (July/June)

Cereal exports for the 2014/15 marketing year (July/June) are forecast at 1.3 million tonnes (comprising about 700 000 tonnes of rice and about 610 000 tonnes of maize), 5 percent up from last year's high level. Total cereal imports (mainly wheat crop) for 2014/15 are projected at 325 000 tonnes, some 3 percent above the 2013/14 level, due to higher domestic wheat consumption.

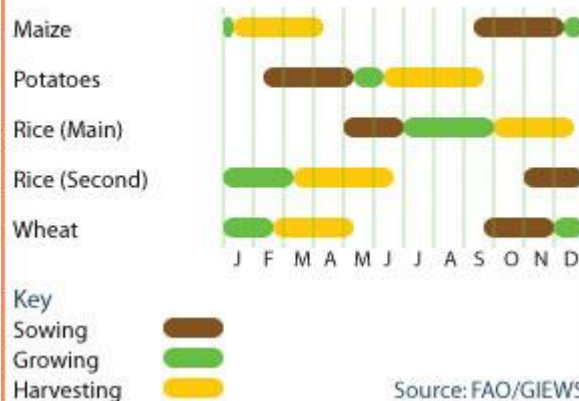
Prices of rice softened somewhat in August and were close to their levels of a year earlier

The wholesale prices of *Emata* rice, the most commonly consumed variety, softened somewhat in August after the steady increases in previous months due to sustained demand from China. Overall, prices were close to their levels of a year earlier.

Food insecurity remains a concern in some areas

Overall, the food security situation has improved. However, recurrent inter-communal tensions since June 2012 have negatively impacted the food security situation of the affected population. According to the latest UNHCR estimates, nearly half a million people remain displaced in Rakhine (southwest), Kachin (north), Shan (east) and southeast of Myanmar. Generally, high food prices are further affecting the food security situation of vulnerable groups of the population.

Crop calendar Myanmar

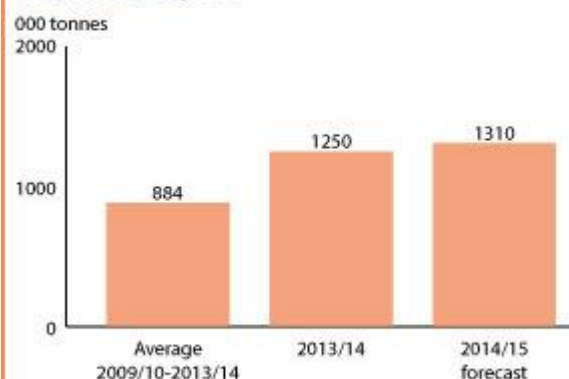


Myanmar Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes			percent
Rice (paddy)	30 149	28 767	29 500	3
Maize	1 390	1 700	1 750	3
Millet	185	185	185	0
Others	195	193	193	0
Total	31 919	30 845	31 628	3

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

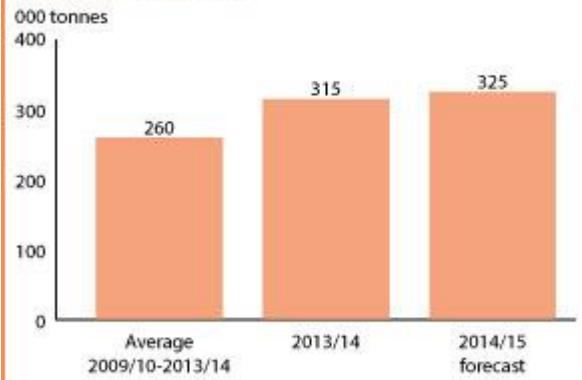
Myanmar Total cereal exports



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

Myanmar

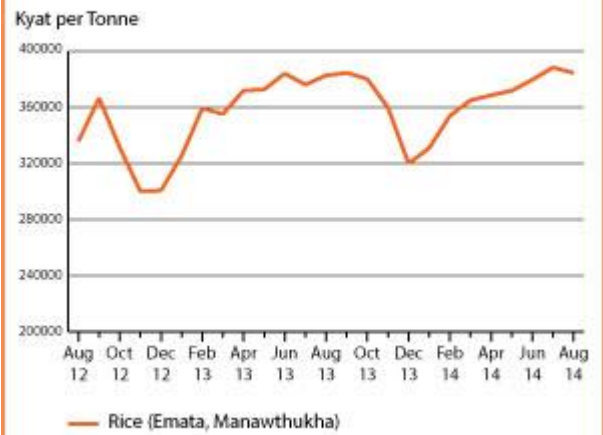
Total cereal imports



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

Myanmar

Wholesale rice prices in Yangon



Source: E-Trade Myanmar

Reference Date: 14-August-2014

FOOD SECURITY SNAPSHOT

- Good prospects for the 2014 main season rice crop
- Cereal exports in the 2014/15 marketing year (July/June) forecast at last year's high level
- Prices of rice continued to increase in July reaching record levels
- Food insecurity concerns remain in some areas

Good prospects for the 2014 main season rice crop

Planting of the 2014 main (wet) season rice crop, which accounts for about 80 percent of annual production, was completed in June. After lower-than-normal precipitation in May, particularly over the main central producing areas, remote sensing data indicate well above-average rains since June in most parts of the country, benefitting late transplanting activities and the early planted crops. Assuming favourable weather conditions during the remainder of the main season and an average secondary season harvest, to be planted from November onwards, FAO forecasts the aggregate 2014 rice production at 29.5 million tonnes, 3 percent up from last year but still remains slightly below the five-year average.

FAO's latest estimates puts the 2014 maize production, harvested by mid-April, at a record level of 1.8 million tonnes, 3 percent up from the 2013 bumper crop. This reflects a slight expansion in planted area, in response to higher demand from the domestic feed industry and from neighbouring China, as well as higher yields, following favourable rainfall and adequate input supply during the growing season.

Cereal exports in the 2014/15 marketing year (July/June) forecast at last year's high level

Cereal exports for the 2014/15 marketing year (July/June) are forecast at 1.2 million tonnes (comprising about 560 000 tonnes of rice and about 610 000 tonnes of maize), similar to last year's high level. Total cereal imports (mainly wheat crop) for 2014/15 are projected at 325 000 tonnes, some 3 percent above the 2013/14 level, due to higher domestic wheat consumption.

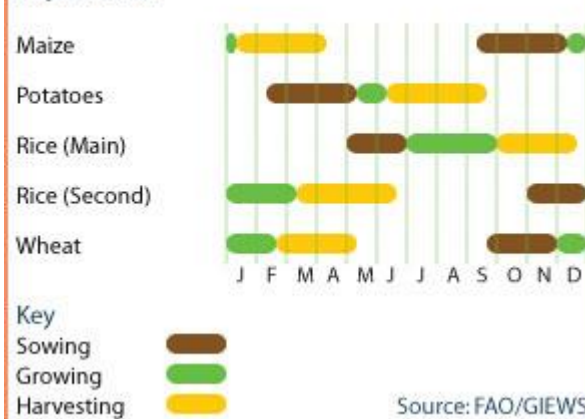
Prices of rice continued to increase in July reaching record levels

The wholesale prices of *Emata* rice, the most commonly consumed variety, continued their gradual upward trend since the beginning of 2014, reaching record levels in July. Prices were mainly supported by strong import demand, particularly from China.

Food insecurity concerns remain in some areas

Overall, the food security situation has improved. However, recurrent inter-communal tensions since June 2012 have negatively impacted the food security situation of the affected population. According to the latest UNHCR estimates, nearly half a million people remain displaced in Rakhine (southwest), Kachin (north), Shan (east) and southeast of Myanmar. High food prices are further affecting the food security

Crop calendar Myanmar

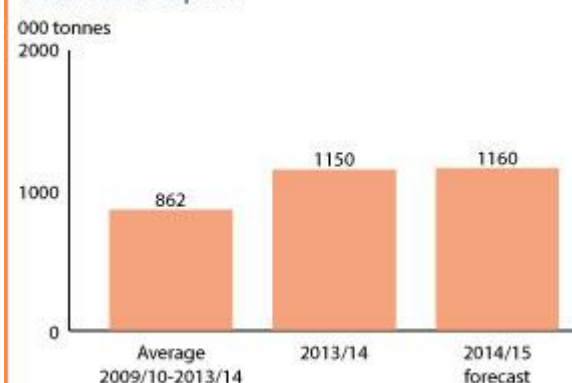


Myanmar Cereal production

	2009-2013	2013	2014	change
	average		forecast	2014/2013
	000 tonnes			percent
Rice (paddy)	30 149	28 767	29 500	3
Maize	1 390	1 700	1 750	3
Millet	185	185	185	0
Others	195	193	193	0
Total	31 919	30 845	31 628	3

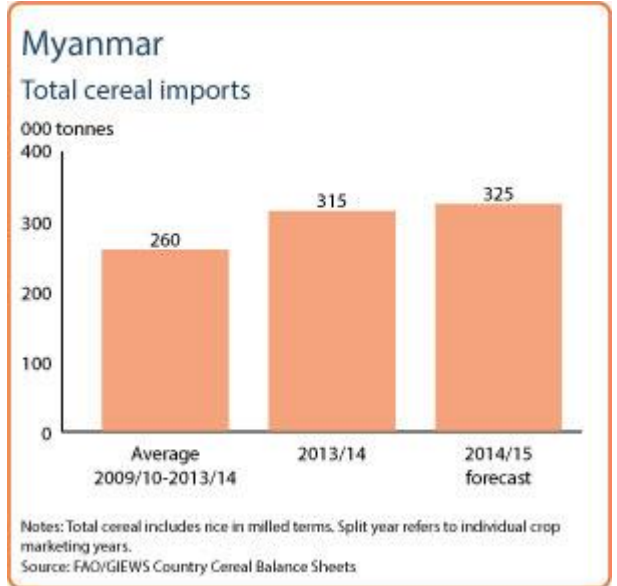
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Myanmar Total cereal exports



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

situation of vulnerable groups of the population.



Reference Date: 14-May-2014

FOOD SECURITY SNAPSHOT

- Planting of the 2014 main season rice crop began amid dry conditions
- The 2013 rice production unchanged from 2012
- Slightly higher cereal exports forecast for 2013/14 marketing year (July/June)
- Price of rice generally stable but at high levels
- Food insecurity concerns remain in some areas

Planting of the 2014 main season rice crop began amid dry conditions

Planting of the 2014 main (wet) season rice crop, which accounts for about 80 percent of annual production, has just started and will continue until late June. Remote-sensed data indicate that localized areas in central and southeastern parts of the country show low soil moisture, following below-average rains in previous weeks, which hindered somewhat land preparation. However, assuming that weather conditions improve and relatively high prices boost plantings of the current main season, FAO tentatively forecasts the aggregate 2014 rice production (including the ongoing 2014 main and the 2014/15 secondary seasons) to increase 4 percent from last year to 29 million tonnes, but still remains below the average level.

FAO's latest estimates put the 2014 maize production, harvested by mid-April, at a record level of 1.8 million tonnes, 3 percent up from the 2013 bumper crop. This reflects a slight expansion in planted area, in response to higher demand from the domestic feed industry and from neighbouring China, as well as higher yields, following favourable rainfall and adequate input supply during the growing season.

The 2013 rice production unchanged from 2012

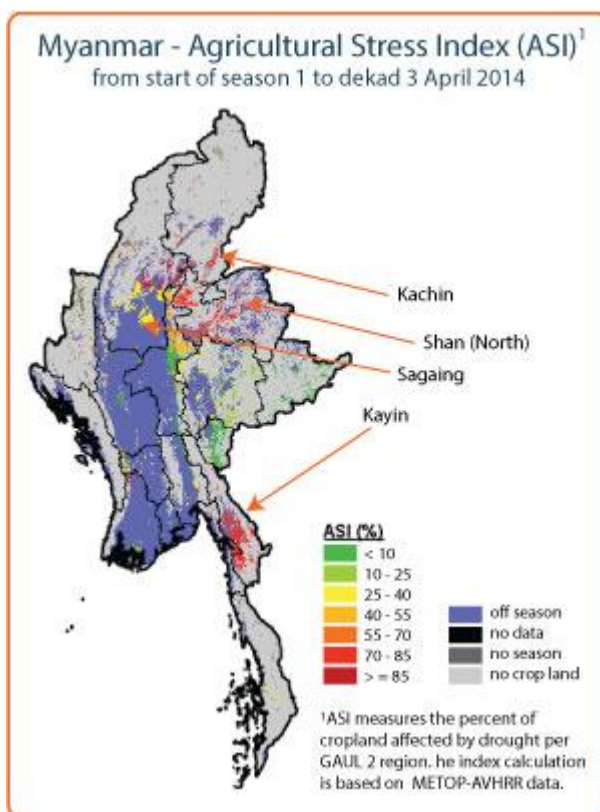
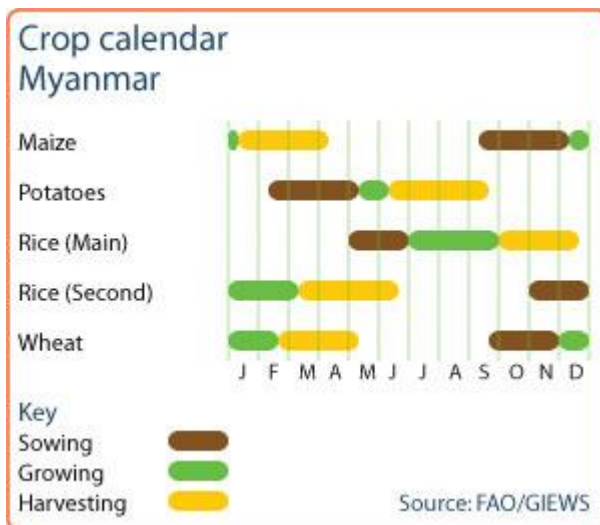
FAO's latest estimates point to an aggregate 2013 paddy output (including the 2013 main season, harvested by mid-December 2013, and the ongoing 2013/14 secondary season) of 28 000 million tonnes, virtually unchanged from the 2012 level. The localized flooding, as a result of torrential rains between July and October, negatively impacted crop production in parts of the country.

Slightly higher cereal exports forecast for 2013/14 marketing year (July/June)

Cereal exports for the 2013/14 marketing year (July/June) are forecast at 1.2 million tonnes (comprising rice about 550 000 and maize about 600 000 tonnes), slightly higher than the above-average level of the previous year. Overall, the total cereal import requirements (mainly including wheat crop) for 2013/14 are forecast at 295 000 tonnes, some 5 percent below the 2012/13 levels, due to higher domestic wheat consumption.

Price of rice generally stable but at high levels

The wholesale prices of *Emata* rice, the most commonly consumed variety, remained relatively stable in April, after marked increases in



previous months, and were around their high levels of a year-earlier. The arrival of the new 2013/14 secondary season crop in the market, partly offset the upward pressure from the reduced 2013 main season harvest, completed in December.

Food insecurity concerns remain in some areas

Overall, food security situation has improved. However, recurrent localized floods in recent years have negatively impacted the food security situation of the affected population. Furthermore, according to the latest UNHCR estimates, nearly half a million people remain displaced in Rakhine (southwest), Kachin (north), Shan (east) and southeast of Myanmar, after continuous inter-communal tensions since June 2012.

Myanmar

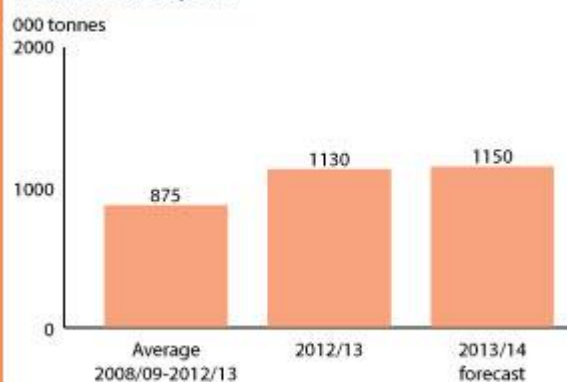
Cereal production

	2009-2013	2013	2014	change
	average			
	000 tonnes			percent
Rice (paddy)	30,070	28,000	29,000	4
Maize	1,390	1,700	1,750	3
Millet	185	185	185	0
Others	195	193	193	0
Total	31,841	30,078	31,128	3

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

Myanmar

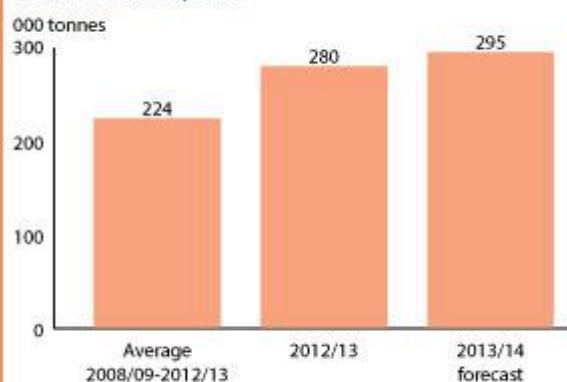
Total cereal exports



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

Myanmar

Total cereal imports

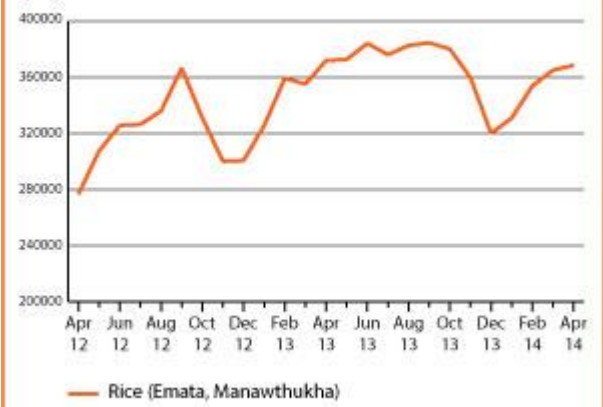


Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Myanmar

Wholesale rice prices in Yangon

Kyat per Tonne



Source: E-Trade Myanmar

Reference Date: 28-January-2014

FOOD SECURITY SNAPSHOT

- Favourable weather at the start of the 2013/14 early cropping season
- Below average rice crop estimated in 2013
- Slightly higher cereal exports for 2013/14 marketing year (July/June)
- Price of rice decrease seasonably
- Food insecurity concerns in some areas remain

Favourable weather at the start of the 2013/14 early cropping season

Planting of the 2014 early season crops, mainly maize, irrigated wheat and irrigated secondary paddy was completed in December. Generally normal to above normal precipitations since the start of the season over large parts of the country benefited sowing and early planted crops development.

Below average rice crop estimated in 2013

Harvesting of the 2013 main (wet) season paddy crop, which accounts for approximately 80 percent of the national output, was completed by mid-December. Following generally favourable weather from May until mid July, torrential monsoon rains between late July to October, resulted in localised flooding particularly affecting Kayin State in the southeast and Bago Region in the southern central part of the country. As a result, FAO's latest forecast puts the 2013 total rice production (main and the ongoing secondary seasons) to a below average level of 29 million tonnes, some 3 percent above the flood-affected harvest of 2012. The increase in production compared to last year's level is mainly attributed to an estimated 4 percent increase in planted area, following a rebound of local rice prices.

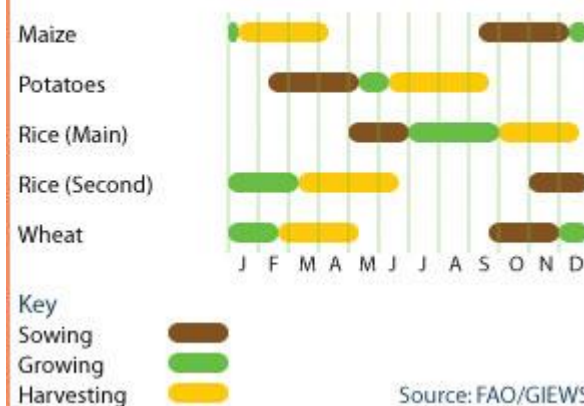
The 2013 main maize crop, harvested by mid-April, is estimated at 1.8 million tonnes, some 17 percent higher than in 2012. The increase mainly reflects an estimated expansion of some 20 percent in the planted area, adequate input supply during the growing season, as well as high demand for the crop from the feed industry and from neighbouring China.

Overall, the annual total cereal harvest of 2013 is preliminarily forecast at 31.2 million tonnes (including paddy) showing a 4 percent increase over the last year's below-average output.

Slightly higher cereal exports for 2013/14 marketing year (July/June)

Cereal exports for 2013/14 marketing year (July/June) are forecast at above average level of 950 000 tonnes (comprising rice about 550 000 and maize about 400 000 tonnes), some 15 percent higher than the 2012/13 level. Overall, the total cereal import requirement for 2013/14 is forecast at 245 000 tonnes, some 11 percent below the 2012/13 level.

Crop calendar Myanmar



Myanmar

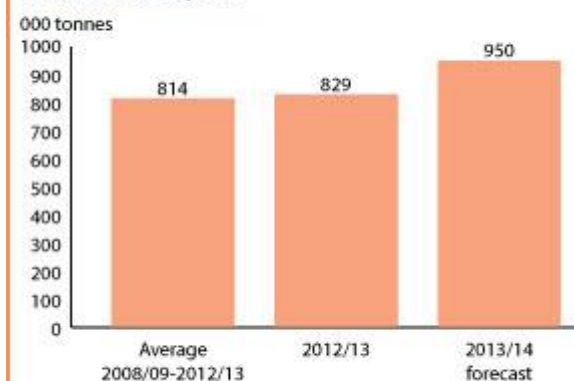
Cereal production

	2008-2012 average	2012	2013 estimate	change 2013/2012
	000 tonnes		percent	
Rice (paddy)	30,985	28,080	29,000	3
Maize	1,287	1,500	1,800	20
Millet	187	185	185	0
Others	193	198	203	3
Total	32,652	29,963	31,188	4

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

Myanmar

Total cereal exports



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

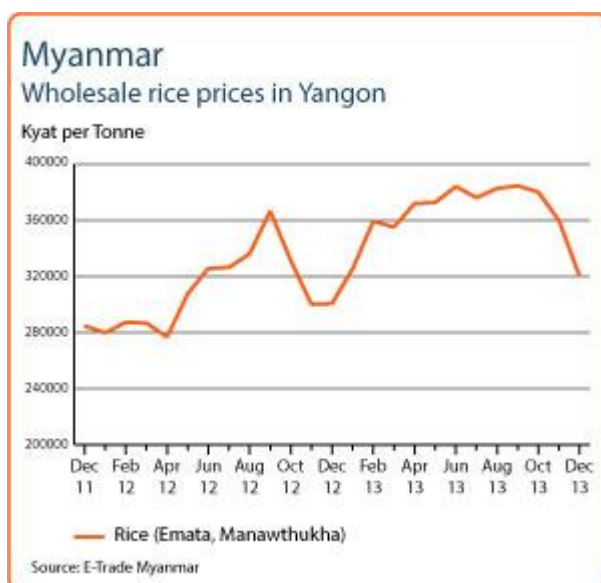
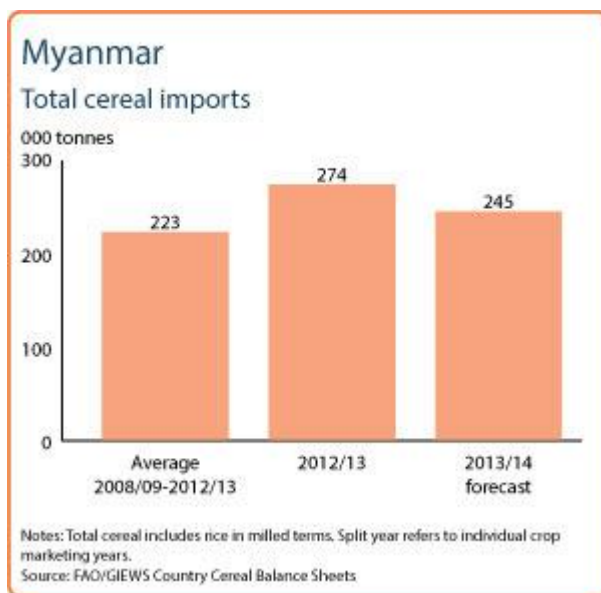
Price of rice decrease seasonably

The wholesale price for *Emata* rice, the most commonly consumed variety, has been decreasing seasonably for the third consecutive month in December 2013 from its record level in September 2013 following the arrival of the 2013 main wet season crop into the markets. Prices were still some 6.4 percent above their levels a year earlier underpinned by increased exports prompted by the depreciation of the national currency in the first half of the year.

Food insecurity concerns in some areas remain

Overall, food security situation has improved. However, the negative effects of localized floods last year, particularly in Kayin State and Bago Region have raised the level of food insecurity of the affected households.

Furthermore, according to UNHCR some 632 000 people remain displaced in Rakhine (southwest), Kachin and southeast of Myanmar, after continuous communal violence in June 2012.



Reference Date: 21-June-2013

FOOD SECURITY SNAPSHOT

- Good performance for the 2013 early season crops
- Below average rice crop estimated in 2012
- Slightly higher cereal exports for 2013/14 marketing year (July/June)
- Price of rice increased sharply in recent months
- Food insecurity concerns due to dry conditions in some areas conflict in Rakhine, Kachin and Northern Shan states

Good performance of the 2013 early season crops

Harvesting of the 2013 early season crops, mainly maize, wheat and secondary paddy was completed by mid-June.

Following a period of favourable rains at the start of the agricultural season, below average rains set in from late December to mid-April. Most of paddy and wheat in the early season is irrigated, therefore, the dry weather had a limited impact on the crops.

Planting of the 2013 main (wet) season paddy crop, which accounts for approximately 80 percent of the national output, commenced in May and will continue until the end of June. Satellite based rainfall estimates indicate that above-average rains were received from early May to mid-June in the northern and southern main producing districts, benefiting planting activities. However, rainfall has been below average over the main growing areas in the central part of the country, particularly affecting planting operations in southern part of Shan State and Mandalay region. The aggregate 2013 paddy output, including the ongoing 2013 main and the 2013/14 secondary season, is preliminarily forecast to reach 32.5 million tonnes, some 3 percent above the estimated 2012 below-average output.

The 2013 main maize crop, harvested by mid-April, is anticipated to be 1.8 million tonnes, some 17 percent higher than in 2012. The increase mainly reflects an estimated expansion of some 15 percent in the planted area, adequate input supply during the growing season, as well as high demand for the crop from the feed industry and from neighbouring China.

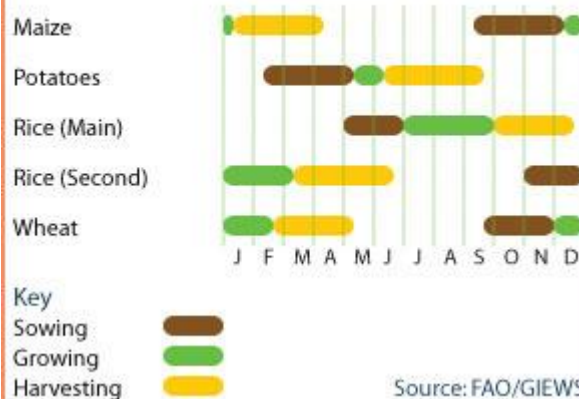
Overall, the annual total cereal harvest of 2013 is preliminarily forecast at 34.6 million tonnes (including paddy) showing a 4 percent increase over the last year's below-average output.

Below average rice crop estimated in 2012

The aggregate 2012 paddy output, including the 2012/13 early and 2012 main seasons, is estimated at 31.5 million tonnes, similar to 2011 output and some 2 percent below the previous five-year average.

The below-average production mainly reflects lower main season paddy output, following damages to paddy crop in the large producing areas of Ayeyarwady and Bago in the southwest, as result of torrential monsoon rains from late July to early August as well as below average rains between May and October over the northern and central areas.

Crop calendar Myanmar



Myanmar

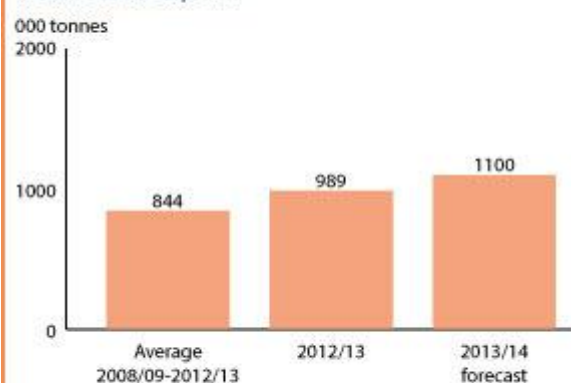
Cereal production

	2008-2012	2012	2013	change
	average		estimate	2013/2012
	000 tonnes		percent	
Rice (paddy)	32 167	31 500	32 500	3
Maize	1 287	1 500	1 750	17
Wheat	180	186	190	2
Others	178	178	178	0
Total	33 812	33 364	34 618	4

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

Myanmar

Total cereal exports



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

Slightly higher cereal exports for 2013/14 marketing year (July/June)

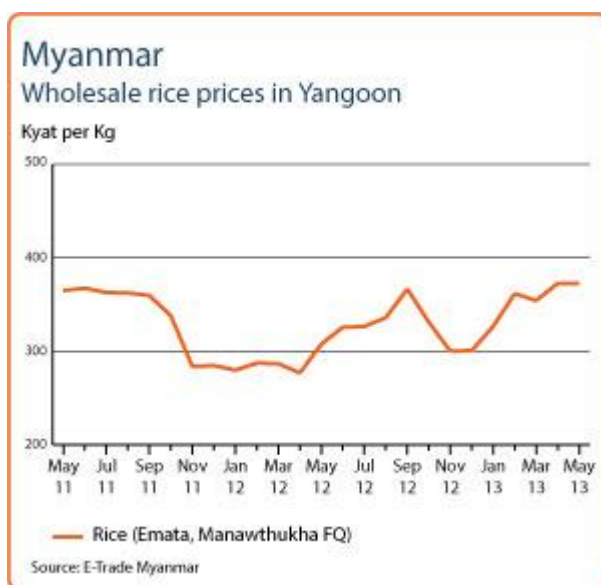
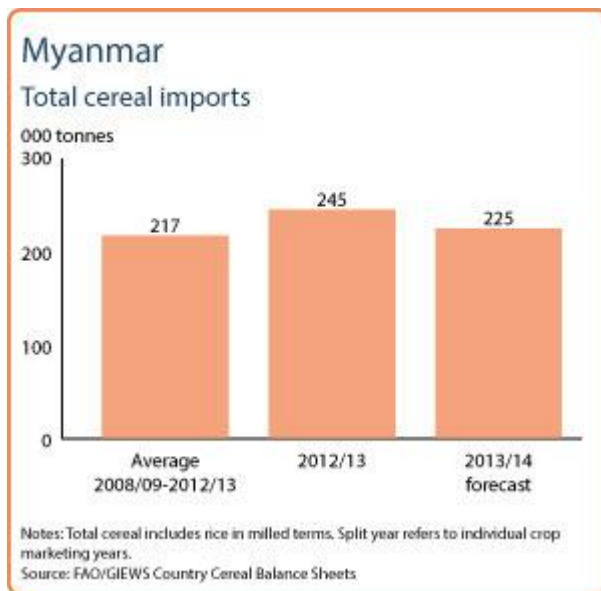
Cereal exports for 2013/14 marketing year (July/June) are forecast at above average level of 1.1 million tonnes (comprising rice about 700 000 and maize about 400 000 tonnes), some 11 percent higher than the 2012/13 level. Overall, the total cereal import requirement for 2013/14 is forecast at 225 000 tonnes, some 8.2 percent below the 2012/13 level.

Price of rice has increased sharply in recent months

The wholesale price for *Emata* rice, the most commonly consumed variety, has been increasing since December 2012, reaching a record level in May. Strong export demand, particularly from China and Indonesia, prompted by the progressive devaluation of the national currency in 2013, underpinned prices, more than offsetting the downward pressure from the good 2012 harvest. Prices were also supported by recent government purchases. In May 2013, the wholesale price of rice in Yangon market averaged Kyat (MMK) 372 760 (about USD 391) per tonne.

Food insecurity concerns in some areas remain

Overall, food security situation has improved. However, expectation of a poor harvest due to below average seasonal rains in lower Sagaing, western and central parts of Mandalay and most of Magway is expected to lead to a deterioration of food insecurity conditions in these areas. Furthermore, in Rakhine (southwest), Kachin and Northern Shan (northeast) states, thousands of people were displaced, after continuous communal violence in June 2012.



Reference Date: 22-January-2013

FOOD SECURITY SNAPSHOT

- Favourable weather at the start of the 2012/13 early cropping season
- Below average rice crop estimated in 2012
- Slightly higher cereal imports in current marketing year
- Price of rice decreased sharply in recent months
- Food insecurity concerns due to adverse impact of floods and conflict in Rakhine, Kachin and Northern Shan states

Favourable weather at the start of the 2012/13 early cropping season

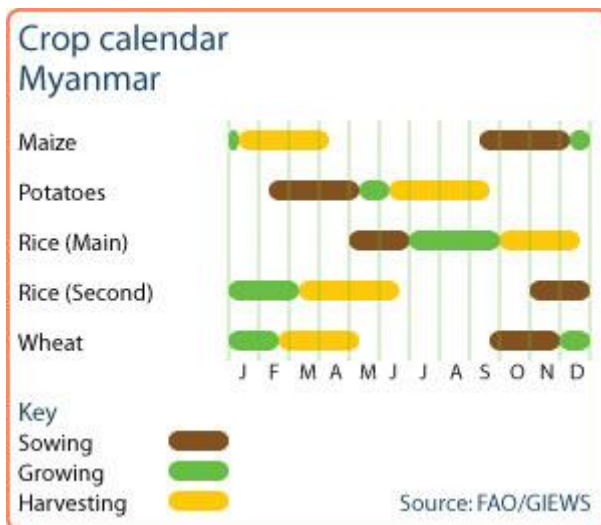
Planting of the 2012 early (secondary) season crops, mainly maize and paddy and the main season wheat was completed in December. Generally above-normal rainfall since the start of the season over large parts of the country improved soil moisture conditions for planting and supported development of earlier planted crops. The remotely sensed data from satellite images, as of the first dekad of January 2013, confirms favourable situation for the 2012/13 cereal crop.

Below average rice crop estimated in 2012

Harvesting of the 2012 main season paddy crop, was completed in December. Following generally favourable weather at the start of the main season (May-June), torrential monsoon rains from late July to early August, resulted in localised flooding across vast parts in the southwest. Reportedly, the consequent inundations caused considerable damage to paddy crop in the large producing areas of Ayeyarwady and Bago. By contrast, northern and central areas, which also represent an important cereal growing region, experienced below average rains between May and October. Additionally, pest infestation led to some localized rice crop losses, particularly impacting Kachin in the northeast. The main season paddy generally accounts for approximately 80 percent of the national annual outputs a result of the developments during the season, FAO has now revised downwards the 2012 total rice production (main and the ongoing secondary season) to 30 million tonnes, almost unchanged from the flood affected harvest of 2011. The 2012 maize crop, harvested by mid-April, is estimated at 1.5 million tonnes, some 15 percent higher than in 2011, reflecting mainly a slight expansion of almost 2 percent in the planted area, adequate input supply during the growing season, as well as high demand for the crop from the feed industry and from neighbouring China. Overall, the annual total cereal harvest for 2012 is forecast at 31.9 million tonnes (including paddy) showing a slight increase over the previous year's below-average output.

Slightly higher cereal imports in current marketing year

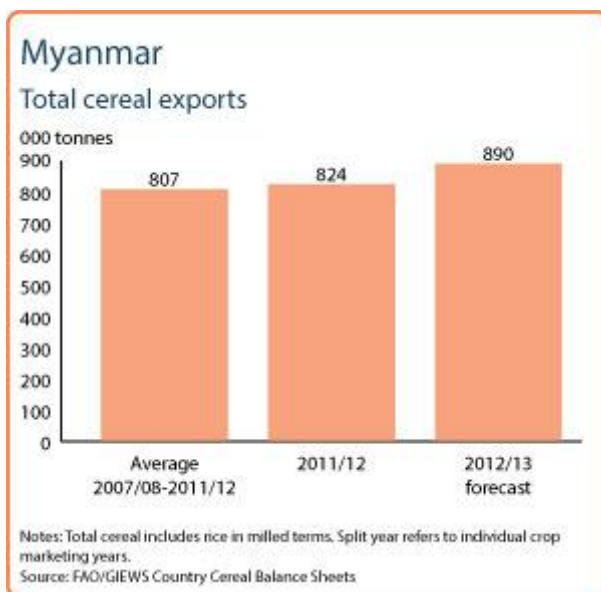
Myanmar imports mainly wheat which is not produced locally. In 2012/13 (July/June) marketing year, the imports are forecast slightly above last year's level at around 160 000 tonnes, in response to increasing demand. Overall, the total cereal import requirement for 2012/13 is forecast at 205 000 tonnes, up by some 5.1 percent on the 2011/12 level.



Myanmar Cereal production

	2007-2011 average	2011	2012 estimate	change 2012/2011
	000 tonnes			percent
Rice (paddy)	30,755	30,000	30,000	0
Maize	1,216	1,300	1,500	15
Wheat	175	185	186	1
Others	178	178	178	0
Total	32,324	31,663	31,864	1

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



Price of rice decreased sharply in recent months

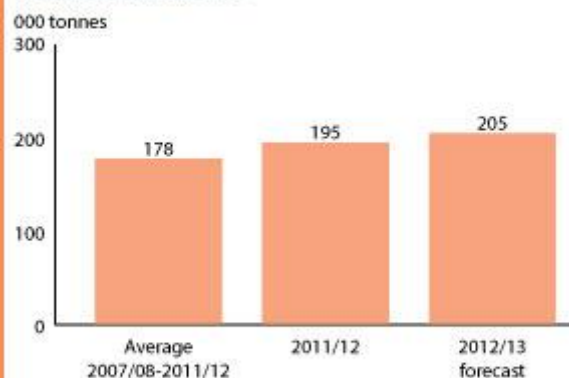
The wholesale price for Emata 25% rice, the main staple food in the country, has been decreasing for the third consecutive month from its peak in September. Prices in August and September had shot up following transport difficulties during and after the heavy rains and floods. The subsequent decrease is mainly attributed to the arrival of the 2012 new wet season crop into markets and the Government release of the supplies from its emergency reserves. The wholesale price of rice in Yangon in December 2012 was about 11 percent above the level of the same month a year ago, but returned to a stable level of around Kyat (MMK) 260 000 (about USD 303) per tonne.

Food insecurity concerns due to adverse impact of floods and conflict in Rakhine, Kachin and Northern Shan states

Overall, food security situation has improved except in areas affected by the floods in July and August 2012, which affected over 200 000 people nationwide. Furthermore, in Myanmar's Rakhine (southwest), Kachin and Northern Shan (northeast) states, thousands of people were displaced, after continuous communal violence since June 2012.

Myanmar

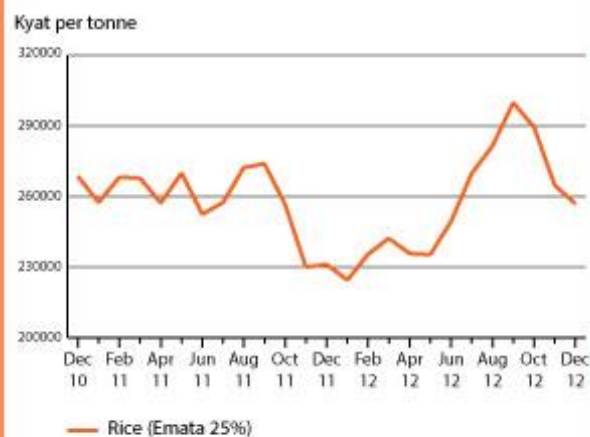
Total cereal imports



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

Myanmar

Wholesale rice prices in Yangon



Source: E-Trade Myanmar

Reference Date: 23-July-2012

FOOD SECURITY SNAPSHOT

- The 2012 early season cereal crops harvest estimated above last year's level
- Slightly higher cereal imports in current marketing year
- Price for rice increased sharply recently but remains below last year's level
- Food insecurity concerns due to adverse impact of floods and conflict in Rakhine state

The 2012 early season cereal crops harvest estimated above last year's level

Harvesting of the 2012 early (secondary) season crops, mainly maize, wheat and secondary paddy was completed in June.

Following a period of abundant rains at the very start of the 2012 agricultural season (September-October), dry weather set in from late October stretching for six dekads. Rains however, resumed more normal patterns between January and June. Most of paddy and wheat crop in the early season is irrigated, therefore the dry spells had a limited impact on the crops.

Planting of the 2012 main season paddy crop, which normally accounts for approximately 80 percent of the national annual output, was completed in June under generally favourable weather conditions. The aggregate 2012 paddy output (early and main seasons) is expected to return to an average level of 31 million tonnes, after it decreased in 2011 due to floods.

The 2012 maize crop, harvested earlier in the year, is estimated to 1.5 million tonnes, some 15 percent higher than in 2011, reflecting mainly a slight expansion of almost 2 percent in the planted area, adequate input supply during the growing season, as well as high demand for the crop from the feed industry and from neighbouring China.

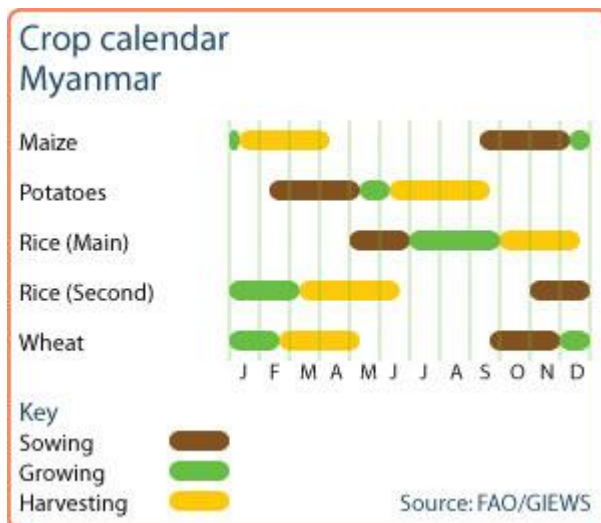
Overall, the annual total cereal harvest for 2012 is forecast at 32.9 million tonnes (including paddy) showing a slight increase of about 4 percent over the previous year's below average output and some 1.7 percent above the average of the last five years.

Rice is the dominant cereal in the country accounting for about 90 percent of the aggregate cereal production.

The 2011 cereal harvest declined from previous year due to floods

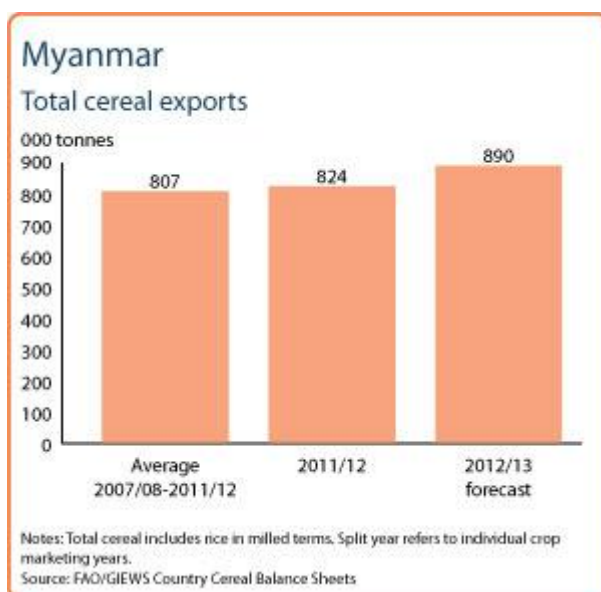
The annual total cereal harvest for 2011 is estimated at 31.7 million tonnes, indicating a slight decline over the previous year's bumper output. The decrease in total cereal output is mainly attributed to a drop in production of the main season paddy crop due to severe localized flooding in the central part of the country following heavy rains during the season.

Slightly higher cereal imports in current marketing



	2007-2011	2011	2012	change
	average		forecast	2012/2011
	000 tonnes		percent	
Rice (paddy)	30 755	30 000	31 000	3
Maize	1 202	1 300	1 500	15
Wheat	169	185	186	1
Others	178	178	178	0
Total	32 304	31 663	32 864	4

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



year

Myanmar imports mainly wheat which is not produced locally. In 2012/13 (July/June) marketing year, the imports are forecast slightly above last year's level at around 160 000 tonnes, in response to increasing demand.

Overall, the total cereal import requirement for 2012/13 is forecast at 205 000 tonnes, up by some 5.1 percent on the 2011/12 level.

Price of rice increased sharply in recent months

The wholesale price for rice, the main staple food in the country, has been increasing since the first week of June and is 4 percent higher than a year earlier. The increase is mainly on account of rising demand of Emata 25% rice variety for export.

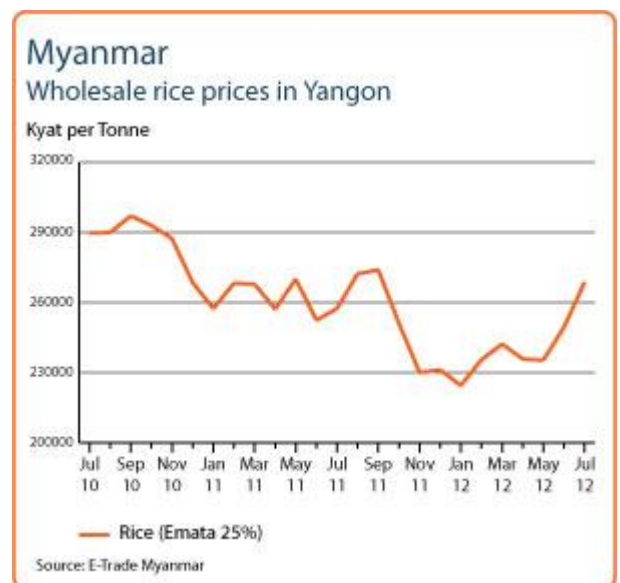
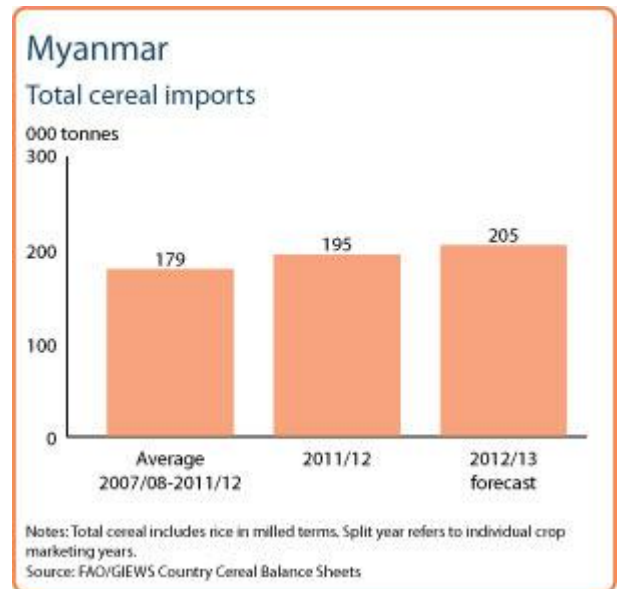
The latest information from the Central Statistical Organization (CSO) indicates that the year-on-year food price inflation in December 2011 decreased by 2.3 percent.

Food insecurity concerns due to adverse impact of floods and conflict in Rakhine state

Overall, food security situation has improved except in areas affected by the floods in October 2011. Official estimates indicate that over 160 people were killed and 36 000 adversely affected, with the majority located in Magway, Mandalay and Sagaing regions. Additionally, crop losses due to the floods severely affected the food security situation in northern Paletwa and Madupi.

Furthermore, in Myanmar's Rakhine state located in the northwest of the country, thousands of people were displaced, after serious inter-communal violence in June 2012. The Government has therefore declared a state of emergency in this state.

According to WFP pockets of food insecurity exist particularly in Buthidaung, Maungdaw and Rathedaung of Northern Rakhine state (NRS) and Pakkoku in the Dryzone.



Reference Date: 13-February-2012

FOOD SECURITY SNAPSHOT

- Poor rains recorded in the major crop growing areas during 2011/12 agricultural season
- Price for rice decreased slightly in recent months, after it rose moderately since the beginning of 2010
- Food insecurity concerns due to adverse impact of floods and conflict in Kachin state

Poor rains recorded in the major crop growing areas during 2011/12 agricultural season

Following a period of abundant rains at the very start of the 2011/12 agricultural season (September-October), dry weather set in from late October stretching for six dekads, which may affect the maize and wheat crops and also the secondary season (dry) rice crop. Most of paddy crop in this season is irrigated, but lack of rainfall may reduce the total water supply for irrigation in some areas.

Harvesting of the 2011 main season paddy was completed by December. Heavy rains in early October caused severe localized flooding in the central region of the country which resulted in the estimated drop in production of the main season paddy crop, which normally accounts for approximately 80 percent of the national annual output.

A preliminary FAO estimate puts the 2011 annual aggregate paddy output at 30 million tonnes (equivalent to 19 million tonnes of milled rice), a decrease of about 3 percent from the good harvest a year before.

Rice is the dominant cereal in the country accounting for more than 90 percent of the aggregate cereal production.

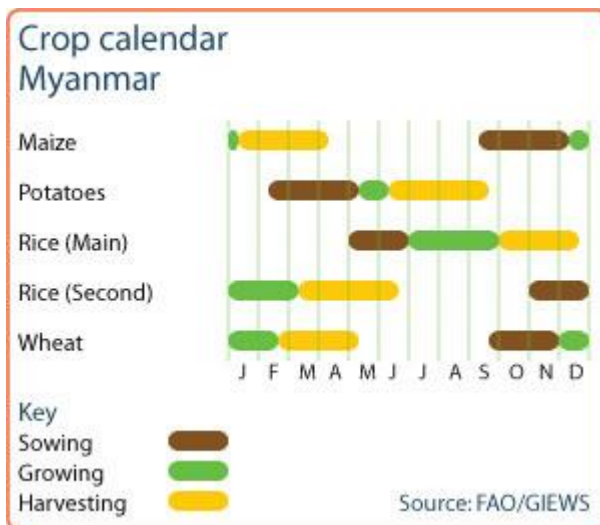
The annual total cereal harvest for 2011 is estimated at 31.7 million tonnes (including paddy) indicating a slight decrease over the previous year's below average output. Nonetheless, the country is expected to produce some exportable surplus of rice and maize.

Myanmar imports mainly wheat which is not produced locally. Since wheat imports in the 2010/11 marketing year (July/June) were above-average resulting in some carryover stocks, the total cereal import requirement for 2011/12 is forecast at 195 000 tonnes, slightly below the level a year before.

Price for rice decreased slightly in recent months, after it rose moderately since the beginning of 2010

The average retail price for rice, the main staple food in the country, decreased over the last few months and has come down somewhat from the record level reached in May 2011.

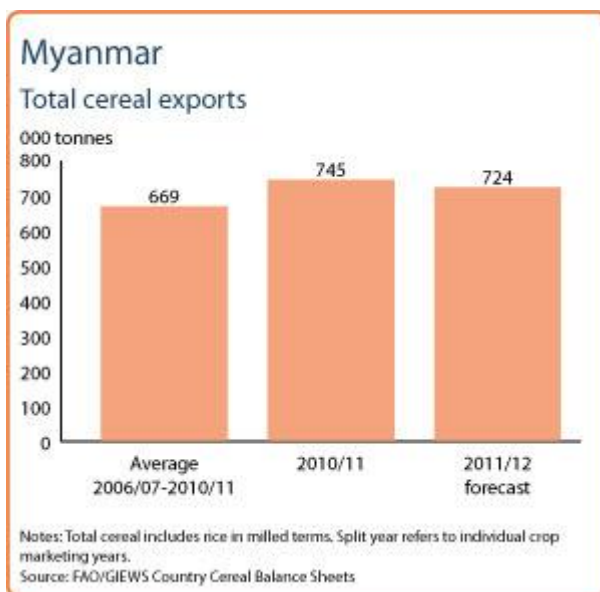
In November 2011 rice prices were 5.7 percent lower than the same month last year. At the same time, however, the latest information from



Myanmar Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes			percent
Rice (paddy)	30 940	30 800	30 000	-3
Maize	1 148	1 250	1 300	4
Millet	165	165	165	0
Others	173	193	198	3
Total	32 427	32 408	31 663	-2

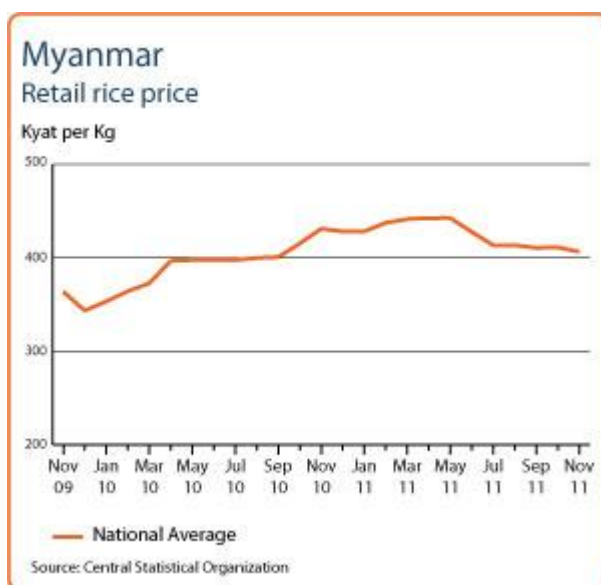
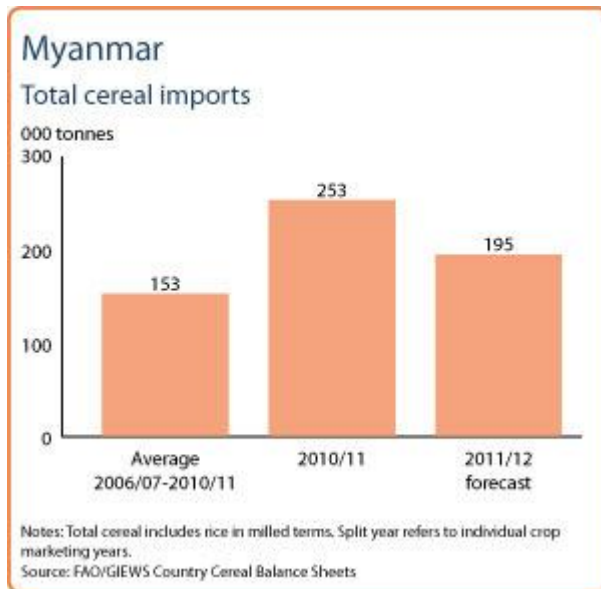
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



the Central Statistical Office indicates that the year-on-year food price inflation in November 2011 was 1.9 percent.

Food insecurity concerns due to adverse impact of floods and conflict in Kachin state

Overall, food security situation has improved except in areas affected by the floods in October. Official estimates indicate that over 160 people were killed and 36 000 adversely affected, with the majority located in Magway, Mandalay and Sagaing regions. Furthermore, in Myanmar's northern Kachin state, thousands of people were displaced, after recent fighting between Kachin Independence Army (KIA) and the government forces. According to WFP pockets of food insecurity exist particularly in Buthidaung Maungdaw, Rathedaung of NRS and Pakkoku in the Dryzone. In 2011 the international donors responded with a total of USD 54 million for development of the key livelihoods sectors.



Reference Date: 21-December-2011

FOOD SECURITY SNAPSHOT

- Paddy rice production of the 2011 main season estimated to decline mainly due to floods
- Prices of rice have risen steadily since the beginning of 2010 but overall food price inflation remains quite low
- Food insecurity concerns due to adverse impact of floods in parts

Paddy rice production of the 2011 main season estimated to decline mainly due to floods

Planting of the second 2011/12 paddy season is virtually over. Rainfall has been generally satisfactory in most of the regions, except for the north-western part of the country.

Harvesting of the 2011 main season paddy has recently been completed. Heavy rains in October caused severe localized flooding in the central region of the country which resulted in the estimated drop in production of the main season paddy crop, which normally accounts for approximately 80 percent of the national annual output. A preliminary FAO estimate of the 2011 annual aggregate paddy output has been revised down to 30 million tonnes (equivalent to 19 million tonnes of milled rice), a decrease of about 3 percent from the good harvest a year before.

Rice is the dominant cereal in the country accounting for more than 90 percent of the aggregate cereal production.

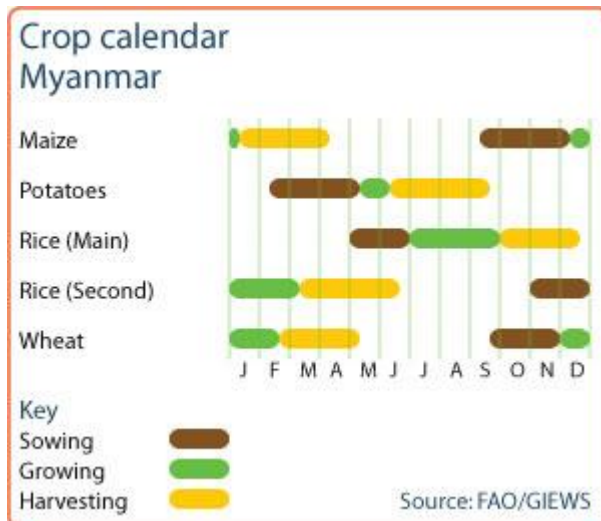
The annual total cereal harvest for 2011 is estimated at 31.7 million tonnes (including paddy) indicating a slight decrease over the previous year's below average output. Nonetheless, the country is expected to produce some exportable surplus of rice and maize.

Myanmar imports mainly wheat which is not produced locally. Since wheat imports in the 2010/11 marketing year (July/June) were above-average resulting in some carryover stocks, the total cereal import requirement for 2011/12 is forecast at 195 000 tonnes, slightly below the level a year before.

Prices of rice have risen moderately since the beginning of 2010 but overall food price inflation remains quite low

The average retail price for rice, the main staple food in the country, has remained relatively stable over the last few months, after declining somewhat from record reached in May 2011. In September 2011 rice prices were 2.5 percent higher than the same month last year. At the same time, however, the latest information from the Central Statistical Office indicates that the year-on-year food price inflation in September was 0.8 percent.

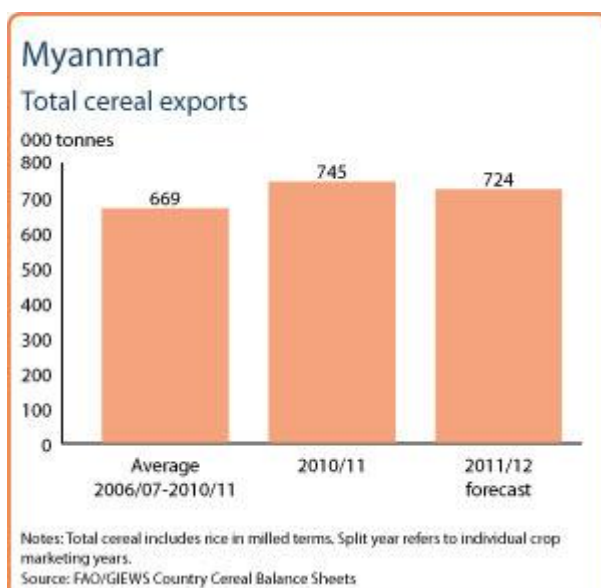
Food insecurity concerns due to adverse impact of floods



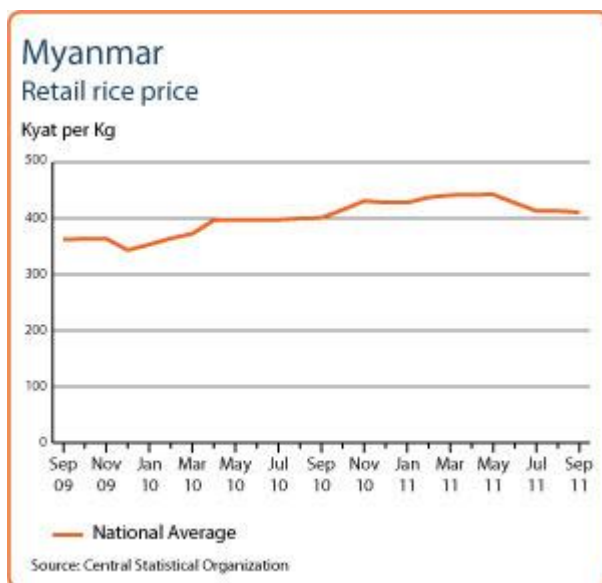
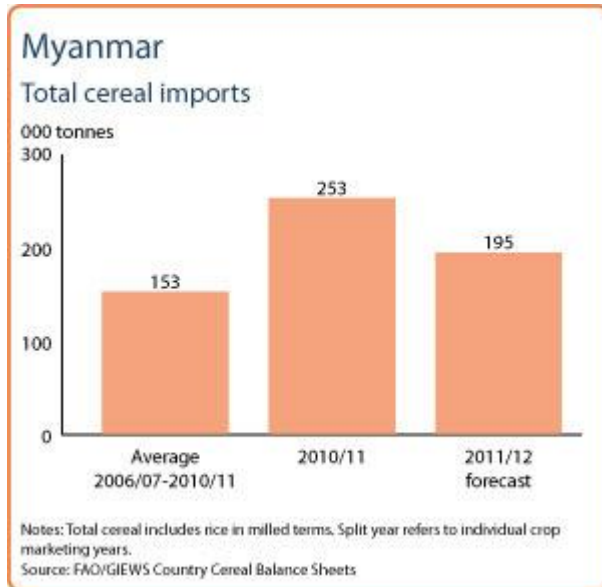
Myanmar Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes			percent
Rice (paddy)	30 940	30 800	30 000	-3
Maize	1 148	1 250	1 300	4
Millet	165	165	165	0
Others	173	193	198	3
Total	32 427	32 408	31 663	-2

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



Overall, food security situation has improved except in areas affected by the Tropical Storm Two and the also floods in October. Official estimates indicate that over 160 people were killed and 36 000 adversely affected, with the majority located in Magway, Mandalay and Sagaing regions. Furthermore, according to the WFP/VAM bulletin pockets of food insecurity exist particularly in Buthidaung Maungdaw, Rathedaung of NRS and Pakkoku in the Dryzone. In 2011 the international donors responded with a total of USD 54 million for development of the key livelihoods sectors.



Reference Date: 26-May-2011

FOOD SECURITY SNAPSHOT

- Near normal harvests are expected for the mostly-irrigated early cereal crops in 2011
- Prices of rice have risen steadily since the beginning of 2010
- Pockets of vulnerability persist following natural disasters

Near normal outcome of the 2011 early season cereal crops is expected

Early season crops such as maize, wheat and secondary paddy are either harvested or nearing completion of the harvest period. Wheat and rice are either fully dependent on irrigation or are supplemented by irrigation. In average, the dry season paddy production accounts for about 18 to 20 percent of the annual output and for about 15 to 17 percent of the area harvested. Rainfall in the country from the beginning of the season in November 2010 to the first dekad of April 2011 has been generally below average in the north and above average in the south. Overall, an about normal cereal harvest is expected. The annual total cereal harvest for 2011 is forecast at 32.4 million tonnes (including paddy) showing a slight increase over the previous year's below average output. Rice accounts for more than 90 percent of the aggregate cereal production. Low precipitation throughout the country for the main season adversely affected the total output.

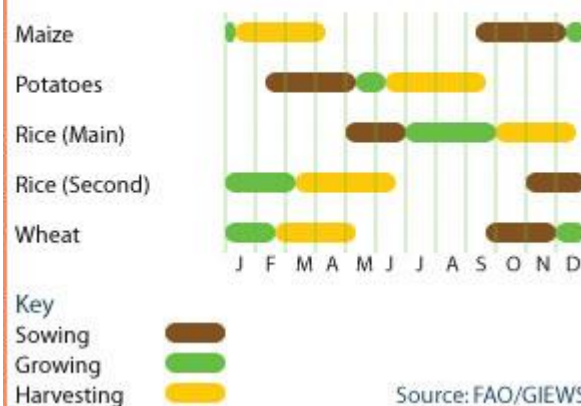
Prices of rice have risen steadily since the beginning of last year

Latest information from the Central Statistical Office indicates that the average retail rice price in February 2011 was 20 percent higher than the same month a year earlier, while the year-on-year food price inflation in January was 9.7 percent and the consumer price inflation 8.3 percent over the same period. The increase in prices of the main staple rice is hampering access to food by vulnerable groups of population.

Pockets of vulnerability persist following natural disasters in recent years

According to UNOCHA infant mortality in Myanmar remains high, with one in 10 births resulting in the infant's death. Furthermore, malnutrition is widespread among children under age 5 and life expectancy is 61.2 years, compared with the regional average of 72.2 years. Severe devastation including damages to agricultural infrastructure and production systems during the 2008 monsoon season in Ayeyarwady Delta and Yangon Division was caused by Cyclone Nargis. The country is affected by various natural disasters. In 2011 the international donors have responded with a total of USD 54 million for development of the key livelihoods sectors.

Crop calendar Myanmar

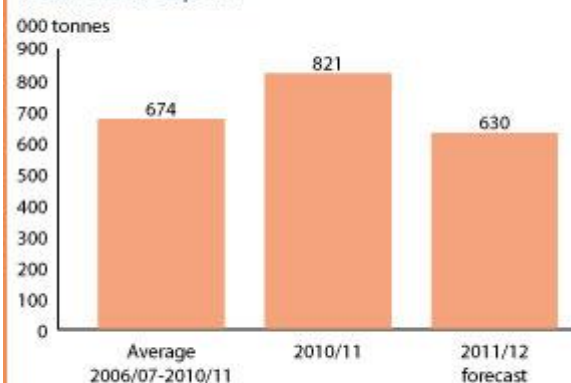


Myanmar Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes			percent
Rice (paddy)	30 940	30 800	31 000	1
Maize	1 104	1 115	1 115	0
Millet	165	165	165	0
Others	178	178	178	0
Total	32 374	32 243	32 443	1

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

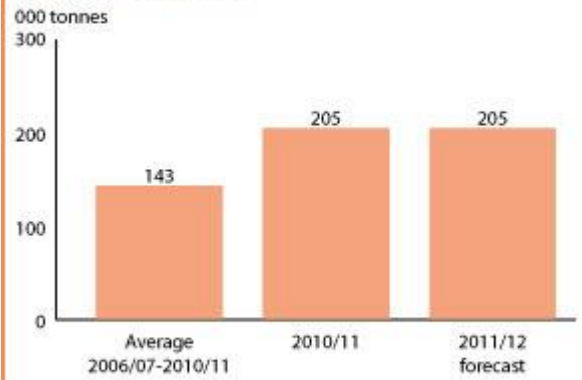
Myanmar Total cereal exports



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

Myanmar

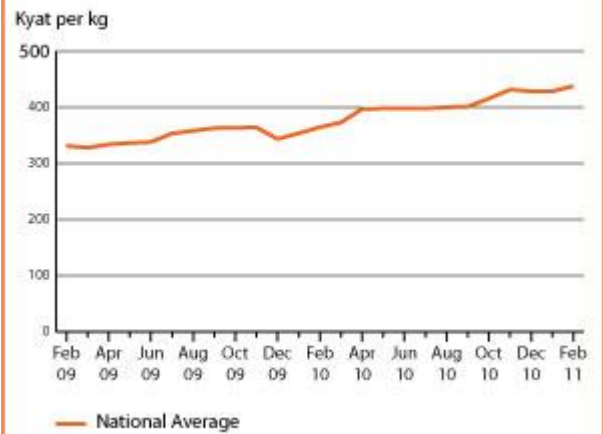
Total cereal imports



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

Myanmar

Retail rice price



Source: Central Statistical Organization

Reference Date: 19-April-2011

FOOD SECURITY SNAPSHOT

- Near normal harvests are expected for the mostly-irrigated early cereal crops in 2011
- Prices of rice have risen steadily since the beginning of 2010
- Pockets of vulnerability persist following natural disasters

Near normal outcome of the 2011 early season cereal crops is expected

Early season crops such as maize, wheat and secondary paddy are currently being harvested. Wheat and rice are either fully dependent on irrigation or supplemented by irrigation. In average, the dry season paddy production accounts for about 18 to 20 percent of the annual output and for about 15 to 17 percent of the area harvested. Rainfall in the country from the beginning of the season in November 2010 to the first dekad of April 2011 has been generally below average in the north and above average in the south. Overall, an about normal cereal harvest is expected.

Official figures for the aggregate cereal production of 2010 are not yet available but FAO estimates it to be about 32 million tonnes, slightly below the previous year's level. Rice accounts for more than 90 percent of the aggregate cereal production. Low precipitation throughout the country for the main season adversely affected the total output.

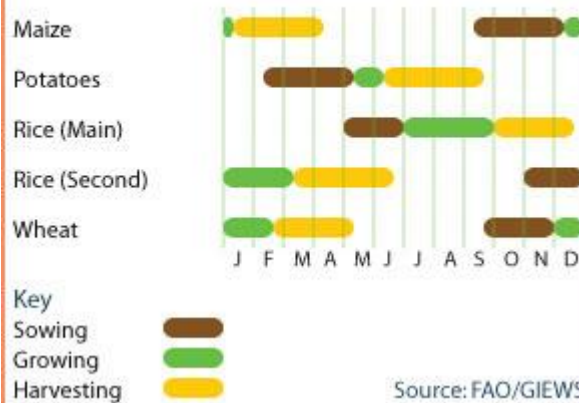
Prices of rice have risen steadily since the beginning of last year

Latest information from the Central Statistical Office indicates that the average retail rice price in January 2011 was 21 percent higher than the same month a year earlier, while the year-on-year food price inflation was 9.7 percent and the consumer price inflation 8.3 percent over the same period. The increase in prices of the main staple rice is hampering access to food by vulnerable groups of population.

Pockets of vulnerability persist following natural disasters in recent years

According to UNOCHA infant mortality in Myanmar remains high, with one in 10 births resulting in the infant's death. Furthermore, malnutrition is widespread among children under age 5 and life expectancy is 61.2 years, compared with the regional average of 72.2 years. Severe devastation including damages to agricultural infrastructure and production systems during the 2008 monsoon season in Ayeyarwady Delta and Yangon Division was caused by Cyclone Nargis. The country is affected by various natural disasters. In 2011 the international donors have responded with a total of USD 54 million for development of the key livelihoods sectors.

Crop calendar Myanmar

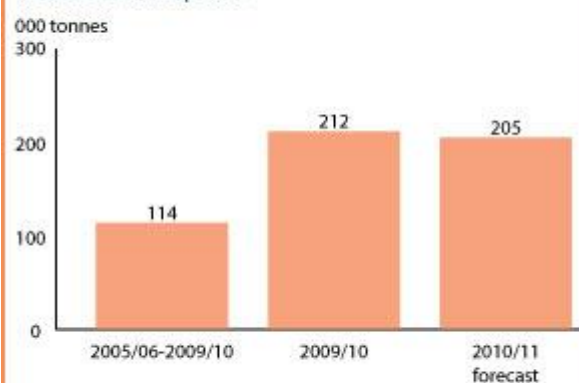


Myanmar Cereal production

	2005-2009 average	2009	2010 estimate	change 2010/2009
	000 tonnes			percent
Rice (paddy)	30317	31000	30800	-1
Maize	1065	1115	1115	0
Millet	173	165	165	0
Others	166	173	163	-6
Total	31721	32453	32243	-1

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

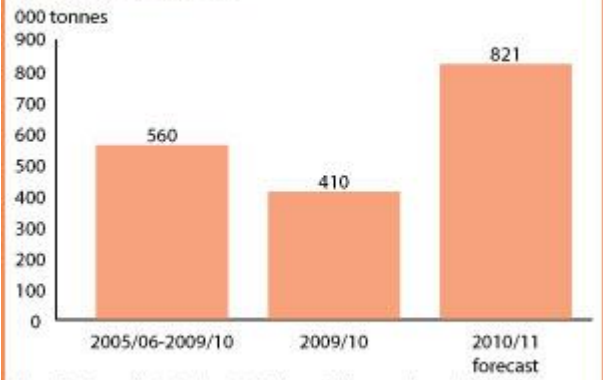
Myanmar Total cereal imports



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

Myanmar

Total cereal exports

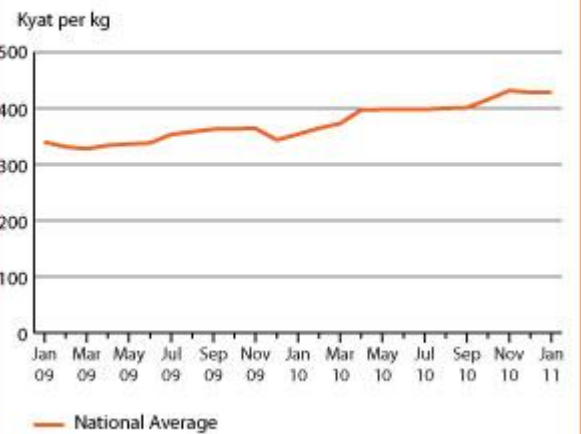


Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.

Source: FAO/GIEWS Country Cereal Balance Sheets

Myanmar

Retail rice price



Source: Central Statistical Organization

Reference Date: 2-September-2010

FOOD SECURITY SNAPSHOT

- Late and erratic rains in May-June delay and affect planting of paddy and other main season crops
- Prices of rice have risen steadily in 2009 and remain higher than the pre-crisis period in 2007
- Overall food security is satisfactory but communities affected by Cyclone Nargis last year are still in need of assistance

Late and erratic rains delay planting of main wet season crops

Low precipitation throughout the country since November 2009 affected the planting of the main season paddy crop. Irregular rainfall this season is expected to result in drop in the wet season crop production. Earlier in the year maize, wheat and second season paddy crops were also affected due to generally dry weather. Irrigation in the first season has helped reduce the loss. Dry season paddy production accounted for about 18 to 20 percent and area harvested about 15 to 17 percent between 2003/04 to 2008/09 according to the FAO/WFP CFSAM 2009 Report.

No official figures for the annual aggregate production are available but FAO estimates it to be about 30 million tonnes, slightly below previous year. Rice accounts for more than 90 percent of the aggregate cereal production. Reportedly, the country had plans to export up to 1 million tonnes during the 2009/2010 (April/March) fiscal year.

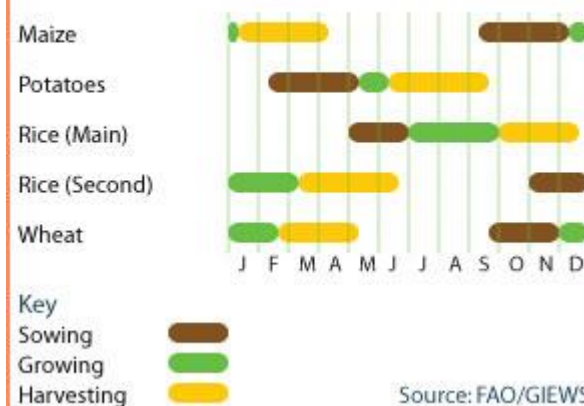
Prices of rice have risen steadily in 2009 and remain higher than the pre-crisis period in 2007

Myanmar being a net exporter of rice has followed the international export prices but with less volatility than the Thai price, for example. With relatively uncertainty over the secondary crop harvest due to possible El Nino effects in the sub-region, the market for rice is expected to remain volatile over the next few months. No price data is available for recent months.

Overall food security is satisfactory but communities affected by Cyclone Nargis last year are still in need of assistance

Severe devastation including damages to agricultural infrastructure and production systems during the 2008 monsoon season in Ayeyarwady Delta and Yangon Division was caused by Cyclone Nargis which struck the country in May 2008. A joint FAO/WFP Crop and Food Security Assessment Mission (CFSAM) which visited the country in October-November last year to assess the impact on agriculture sector. As a result of the UN Flash Appeal some USD 222 million, or 68 percent of the total, were committed by 8 October 2009. The cyclone-related damage to the livestock and fishing sectors in the Ayeyarwady Delta in the south-west continues to affect food supply and income generation. A high-level forum consisting of the

Crop calendar Myanmar



Myanmar

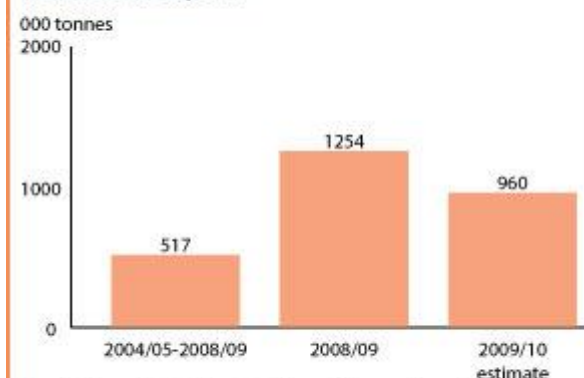
Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Rice (paddy)	30317	31000	30800	-1
Maize	1065	1115	1115	0
Millet	164	165	165	0
Others	167	173	163	-6
Total	31712	32453	32243	-1

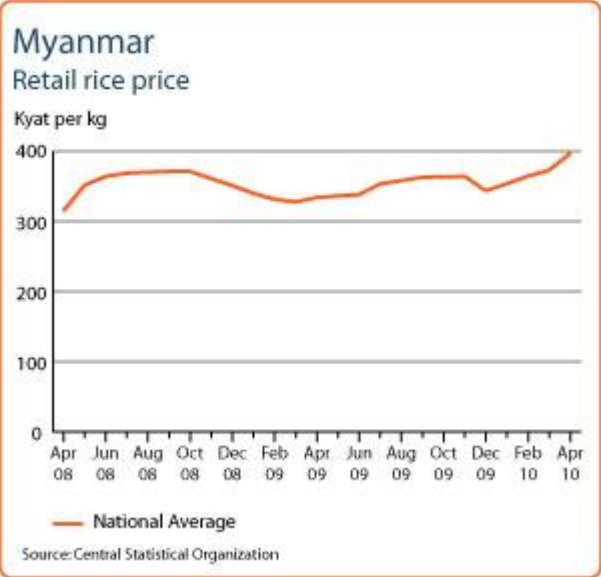
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Myanmar

Total cereal exports



Government and partners was convened recently; it discussed the progress and outstanding critical needs in Nargis affected areas and aims to mobilize USD 103 million to tackle critical gaps in five sectors: Education, Health, Livelihoods, Shelter, and Water, Sanitation and Hygiene.



Reference Date: 15-March-2010

FOOD SECURITY SNAPSHOT

- Dry weather since November 2009 is likely to affect current season crops
- Prices of rice have risen steadily in 2009 and remain higher than the pre-crisis period in 2007
- Overall food security is satisfactory but communities affected by Cyclone Nargis last year are still in need of assistance

Dry weather since November 2009 is likely to affect current season crops

Low precipitation throughout the country since November 2009 is expected to affect the main season for maize and wheat crops and may also affect the secondary season rice crop. Most of the paddy crop in this season is irrigated, but lack of rainfall may reduce the total water supply for irrigation. Dry season paddy production accounted for about 18 to 20 percent and area harvested about 15 to 17 percent between 2003/04 to 2008/09 according to the FAO/WFP CFSAM 2009 Report.

Harvesting of the 2009 rice, the most important cereal, was completed by December. As a response to the record high prices of rice during 2008, the area planted under paddy in 2009 had increased to 7 million ha, up from 6.7 million ha the year before (USDA). Rainfall during the season had been relatively favourable.

No official figure for the annual aggregate production is available but FAO estimates it to be about 30 million tonnes, slightly below previous year. Rice accounts for more than 90 percent of the aggregate cereal production. Reportedly, the country aims at exporting up to 1 million tonnes during the 2009/2010 (April/March) fiscal year.

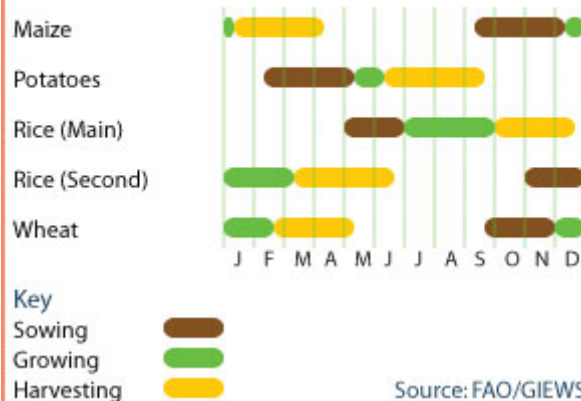
Prices of rice have risen steadily in 2009 and remain higher than the pre-crisis period in 2007

Myanmar being a net exporter of rice has followed the international export prices but with less volatility than the Thai price, for example. With relatively uncertainty over the secondary crop harvest due to possible El Nino effects in the sub-region, the market for rice is expected to remain volatile over the next few months.

Overall food security is satisfactory but communities affected by Cyclone Nargis last year are still in need of assistance

Severe devastation including damages to agricultural infrastructure and production systems during the 2008 monsoon season in Ayeyarwady Delta and Yangon Division was caused by Cyclone Nargis which struck the country in May 2008. A joint FAO/WFP Crop and Food Security Assessment Mission (CFSAM) which visited the country in October-November last year to assess the impact on agriculture sector. As a result of the UN Flash Appeal some USD 222 million, or 68 percent of the total, were committed by 8 October 2009.

Crop calendar Myanmar

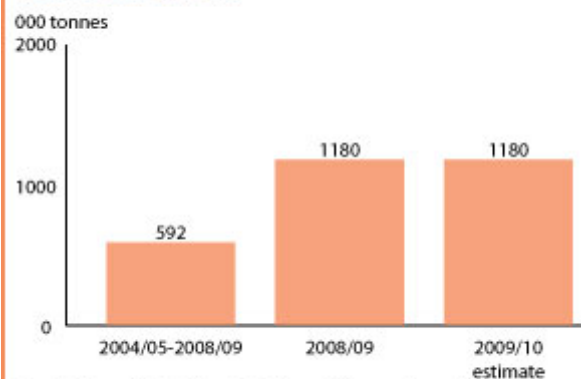


Myanmar Cereal production

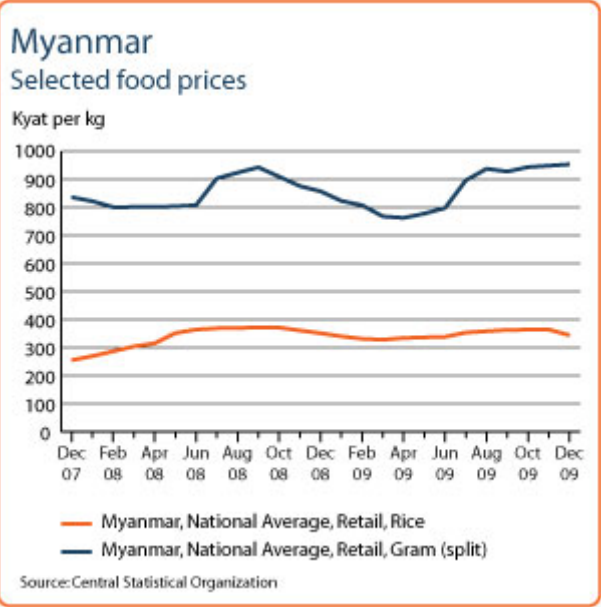
	2004-2008 average	2008	2009 estimate	change 2009/2008
	000 tonnes			percent
Rice (paddy)	29067	30526	30000	-2
Maize	999	1114	1115	0
Millet	163	166	165	-1
Others	165	163	173	6
Total	30394	31969	31453	-2

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

Myanmar Total cereal exports



The cyclone-related damage to the livestock and fishing sectors in the Ayeyarwady Delta in the south-west continues to affect food supply and income generation. A high-level forum consisting of the Government and partners was convened recently; it discussed the progress and outstanding critical needs in Nargis affected areas and aims to mobilize USD 103 million to tackle critical gaps in five sectors: Education, Health, Livelihoods, Shelter, and Water, Sanitation and Hygiene.



Reference Date: 08-October-2009

FOOD SECURITY SNAPSHOT

- Bumper rice harvest is forecast for 2009 mainly due to rise in paddy plantings
- Prices of rice have come down but remain higher than the pre-crisis period in 2007
- The overall food security satisfactory but communities affected by Cyclone Nargis last year are still in need of assistance

Bumper rice harvest is forecast for 2009 mainly due to rise in paddy plantings

Harvesting of the 2009 rice, the most important cereal, is currently underway. Rainfall this year has been relatively good with some dry spells during July and August in the southern parts of the country. However, as a response to the record high prices of rice during 2008, the area planted under paddy in 2009 had increased to 7 million ha, up from 6.7 million ha the year before (USDA). FAO preliminarily forecasts a bumper harvest of some 31.5 million tonnes of paddy this year. Rice accounts for more than 90 percent of the aggregate cereal production. Reportedly the country aims at exporting up to 1 million tonnes during 2009/2010 (April/March) fiscal year.

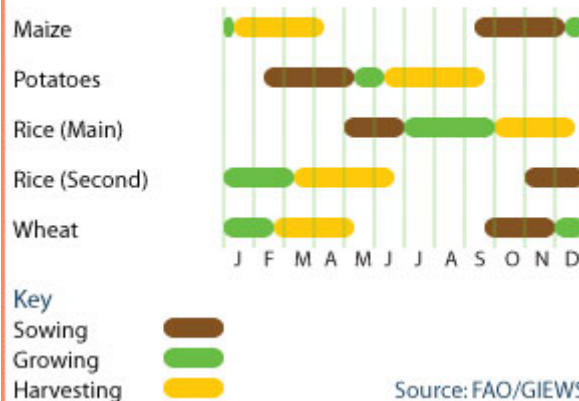
Prices of rice have come down but remain higher than the pre-crisis period in 2007

Myanmar being a net exporter of rice has followed the international export prices very closely. With a relatively good harvest in the sub-region the market for rice is expected to remain soft over the next few months.

Overall food security satisfactory but communities affected by Cyclone Nargis last year are still in need of assistance

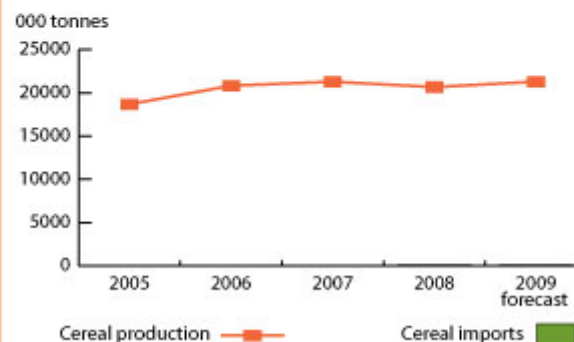
Severe devastation including damages to agricultural infrastructure and production system during the 2008 monsoon season in Ayeyarwady Delta and Yangon Division was caused by Cyclone Nargis which struck the country in May 2008. A joint FAO/WFP Crop and Food Security Assessment Mission (CFSAM) which visited the country in October-November last year to assess the impact on agriculture sector. As a result of the UN Flash Appeal some USD 222 million or 68 percent of the total was committed by 8 October 2009. The cyclone-related damage to the livestock and fishing sectors in the Ayeyarwady Delta continue to affect food supply and income generation. A high-level forum consisting of the Government and partners was convened recently which discussed the progress and outstanding critical needs in Nargis affected areas, and aims to mobilize USD 103 million to tackle critical gaps in five sectors: Education, Health, Livelihoods, Shelter, and Water, Sanitation and Hygiene.

Crop calendar Myanmar



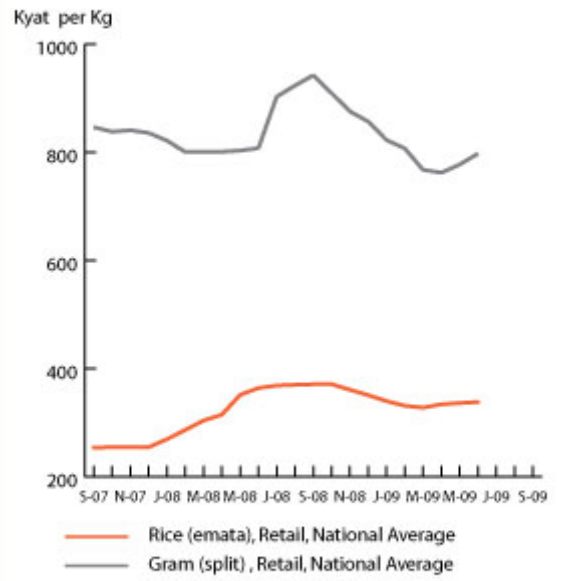
Cereal production and imports Myanmar

Cereal production	2004-2008	2008	2009	change
	average		forecast	
	000 tonnes			percent
Rice (milled)	18312	19231	19845	3.2%
Maize	999	1114	1115	0.1%
Millet	163	166	165	-0.6%
Other	159	163	173	6.1%
Total Cereals	19639	20674	21298	3%



Source: FAO/GIEWS Country Cereal Balance Sheets

Myanmar Selected cereal prices



Source: Central Statistical Organization