



GIEWS Country Brief The Philippines

Reference Date: 01-August-2024

FOOD SECURITY SNAPSHOT

- Below-average area harvested of paddy between April and June 2024
- Above-average cereal import requirements forecast in 2024/25
- Domestic rice prices at near-record level in June 2024

Below-average area harvested of paddy between April and June 2024

Planting of the 2024/25 main paddy crop, accounting for about 60 percent of the annual output, started in April and will continue until September in some areas. Precipitation amounts increased from mid-May onwards over most of the country, providing conducive conditions for crop development and boosting yield prospects. However, in some central and southern provinces, below-average rainfall amounts persisted until early July, negatively affecting crops at critical panicle initiation and flowering stages. In these areas, as of early July 2024, remote sensing images indicate poor vegetation conditions (yellow, orange and red areas in VHI map). The passage of Typhon Aghon over Luzon Island in late May 2024 caused some flooding and affected crops in localized areas of Calabarzon and MIMAROPA provinces. According to the Department of Agriculture, about [6 000 hectares of cropping land](#) have been affected. The 2024/25 dry-season paddy crop, accounting for about 40 percent of the annual output, is expected to be planted from October.

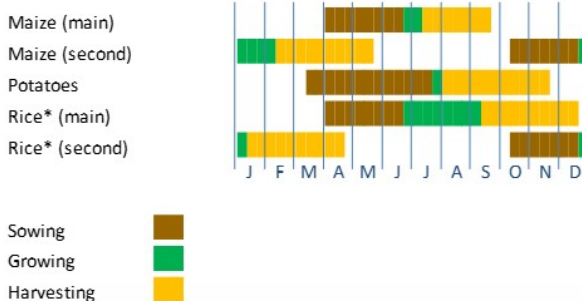
The 2023/24 season concluded in June 2024, with the completion of dry-season harvests. Official assessments indicate that during the second half of the dry-season crop cycle, which unfolded between April and June 2024, area harvested of paddy amounted to 891 770 hectares, 6 percent below the five-year average of the same period due to El Niño-related setbacks. The 2023/24 aggregate paddy production is estimated at 19.8 million tonnes, marginally above the five-year average reflecting the above average main output harvested in 2023.

Planting of the 2024/25 main maize crop started in April and will continue in some areas until August. The area sown is forecast below the five-year average, due to dry weather conditions and planting time and the high risk of Fall Armyworm infestations, which discouraged farmers from planting. The 2024/25 second maize crop will be planted from October onwards.

Philippines

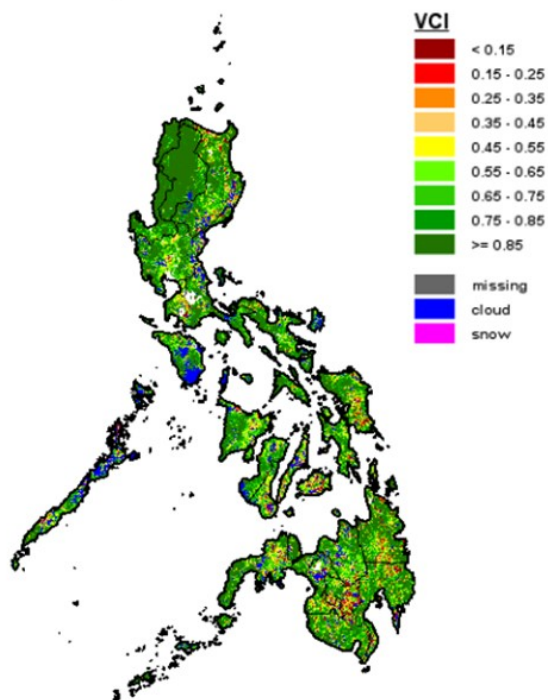
Crop Calendar

(*major foodcrop)



Philippines - Vegetation Condition Index (VCI)

Dekad 1, July 2024



The 2023/24 maize cropping season finalized in May 2024 and the production is estimated at 8.1 million tonnes, marginally below the five-year average,

Above-average cereal import requirements forecast in 2024/25

Total cereal import requirements in the 2024/25 marketing year (July/June) are forecast at 11.1 million tonnes, almost 10 percent above the average. Imports of rice are forecast at record 4.1 million tonnes in calendar year 2024, up 6 percent from 2023. Maize imports are forecast at 1.1 million tonnes, well above the five-year average, mainly due to strong demand by the feed industry. Wheat imports, accounting for the bulk of the country's cereal imports, are forecast at a near average 6.1 million tonnes.

Domestic rice prices at near-record level in June 2024

Domestic prices of regular and well-milled rice, the country's main staple, rose sharply between February 2023 and April 2024, reaching record levels. The increases occurred in the context of increases in international prices and of concerns about the effect of dry weather conditions on the 2023/2024 paddy crop. In May and June 2024, prices stabilized, reflecting improved precipitation amounts for the 2024 main paddy crop, but they remained at near-record levels.

The government has implemented several measures to curb rice price increases, such as reducing tariffs on imports and supporting domestic production with funding for agricultural inputs and machinery. In addition, to improve access to food for the most vulnerable households the government rolled out the [Community Assistance and Rice Discount Program](#).

This program targets approximately 28 million people (about 10 percent of the country's population), providing vouchers to purchase 25 kg of rice per month at a discounted rate between January and December 2024.

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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/>.

Philippines

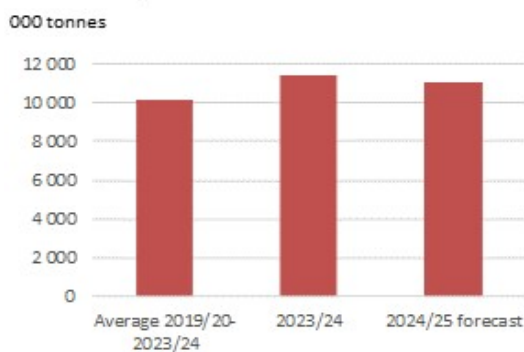
Cereal Production

	2018-2022 average	2022	2023 estimate	change 2023/2022
	000 tonnes			percent
Rice (paddy)	19 439	20 039	19 835	-1.0
Maize	8 082	8 256	8 100	-1.9
Sorghum	1	1	1	0.0
Total	27 522	28 296	27 936	-1.3

Note: Percentage change calculated from unrounded data.

Philippines

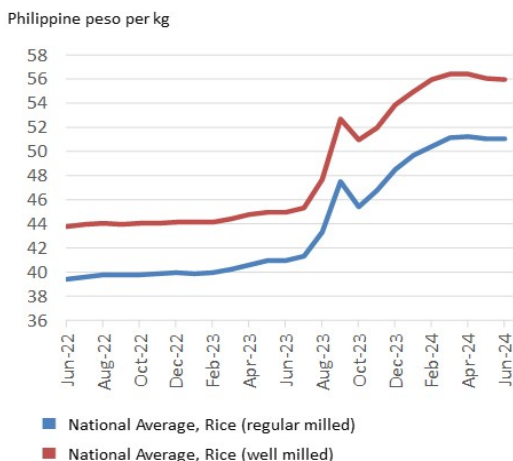
Cereals Imports



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

Philippines

Selected retail prices





GIEWS Country Brief The Philippines

Reference Date: 20-December-2023

FOOD SECURITY SNAPSHOT

- Drier-than-average weather conditions forecast from December 2023 to March 2024 period
- Record cereal import requirements forecast in 2023/24
- Domestic rice prices at near-record levels in November

Drier-than-average weather conditions forecast from December 2023 to March 2024 period

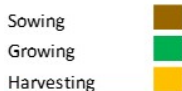
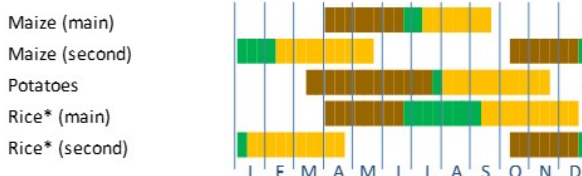
Harvesting of the 2023 main paddy crop, which accounts for about 60 percent of the annual output, is nearing completion and production is forecast at a near-average level of around 11 million tonnes. Localized crop losses were caused by several storms and typhoons between July and October. Planting of the 2023 second paddy crop is ongoing. In the key producing regions of Cagayan Valley, Central Luzon, Western Visayas and MIMAROPA, where about half of the second crop is grown, following below-average precipitation amounts since last October has led to soil moisture deficits. In these areas, remote sensing data, as of end-November, indicated poor vegetation conditions (VCI map), inferring unfavourable yield prospects for the early-planted crops. In the remaining cropping areas, sufficient rains in November improved soil moisture conditions for planting operations and benefitted crop germination. Weather forecasts point to a high likelihood of below-average precipitation amounts and elevated temperatures between December 2023 and March 2024, associated with the prevailing El Niño event. If this forecast materializes, production of the 2023 second crops may be negatively affected.

Harvesting of the 2023 main maize crop was completed last September and production is officially estimated at 4 million tonnes, 6 percent above the average. The good output is mainly attributed to bumper yields owing to favourable weather conditions and widespread use of high-yielding seed varieties. Planting of the 2023 second season crop is nearing completion in key producing southern areas supported by adequate precipitation amounts since last November. In the northern regions, which account for 25 percent of maize plantings, persistent dry weather conditions expected may affect both area planted and yields.

Philippines

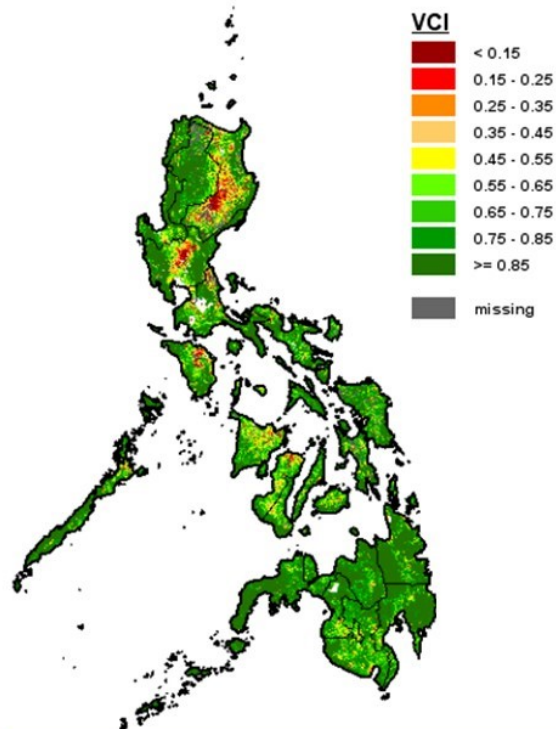
Crop Calendar

(*major foodcrop)



Philippines - Vegetation Condition Index (VCI)

November 2023



Record cereal import requirements forecast in 2023/24

Cereal import requirements in the 2023/24 marketing year (July/June) are forecast at a record level of 11.5 million tonnes. Imports of rice are forecast at 4.1 million tonnes in calendar 2024. Maize imports are forecast at 1.1 million tonnes, well above the five-year average, due to strong demand by the feed industry. Import requirements of wheat, accounting for the bulk of the country's cereal imports and used for both food and feed, are projected at a near-average level of 6.1 million tonnes.

Domestic rice prices at near-record level in November

Domestic prices of regular and well-milled rice, the country's main staple, increased throughout 2023, reaching near-record levels last November in nominal terms. Prices surged particularly between July and September as seasonal trends were compounded by increases of international export quotations. High production and transport costs also supported prices.

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 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/>

Philippines

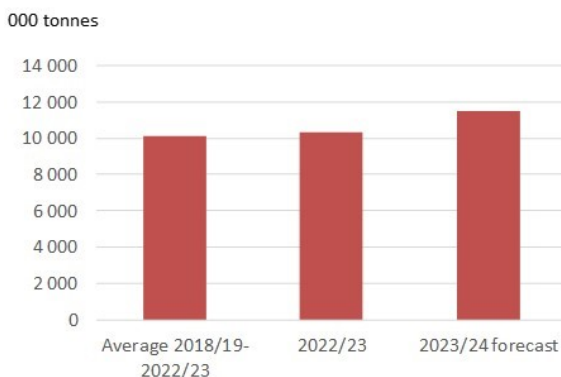
Cereal Production

	2018-2022	2022	2023	change
	average		forecast	2023/2022
000 tonnes				
Rice (paddy)	19 444	20 061	19 580	-2.4
Maize	8 094	8 300	8 200	-1.2
Sorghum	1	1	1	0.0
Total	27 538	28 362	27 781	-2.0

Note: Percentage change calculated from unrounded data.

Philippines

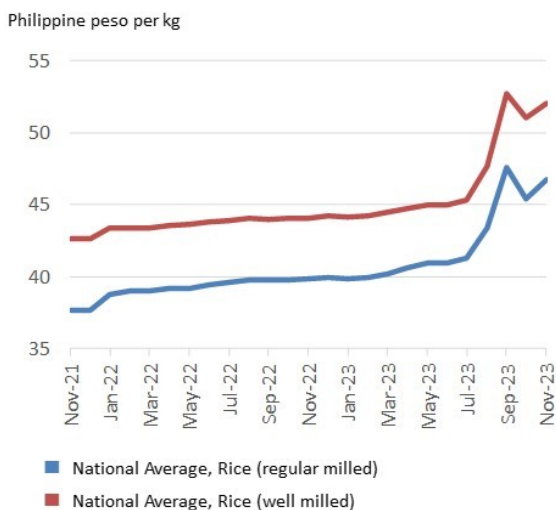
Cereals Imports



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

Philippines

Selected retail prices





GIEWS Country Brief The Philippines

Reference Date: 22-November-2022

FOOD SECURITY SNAPSHOT

- Cereal production in 2022 forecast slightly above average
- Cereal import requirements in 2022/23 marketing year (July/June) forecast slightly above average
- Domestic maize prices at high levels in 2022 due to strong demand for feed

Cereal production in 2022 forecast slightly above average

Harvesting of the 2022 main paddy crop, which accounts for about 60 percent of the annual production, started in July and will finalize by December. Crop conditions have been favourable during the season (ASI map), reflecting adequate June-October monsoon rainfall amounts and above-average irrigation water supplies. In addition to other ongoing public assistance schemes, the government scaled up the existing fertilizer subsidy programme in order to help offset the negative effects of the high prices of agricultural chemicals. Localized crop losses were caused by heavy rainfall, strong winds and floods brought by typhoon Noru in late September and by typhoon Nalgae in late October over parts of Central Luzon, BARMM and Western Visayas regions. Farmers are currently planting the secondary paddy crop to be harvested next year. The area planted is expected at an above-average level, underpinned by official assistance programmes. Overall, the aggregate 2022 paddy output is preliminarily forecast at 20 million tonnes, close to the 2021 level and about 3 percent above the five-year average.

The 2022 main maize crop was harvested last September and the production is officially estimated at 3.9 million tonnes, slightly above the average, due to favourable weather conditions. Overall, the aggregate 2022 maize output, including the 2022 secondary crop for harvest next year, is preliminarily forecast at 8.3 million tonnes, 4 percent above the five-year average.

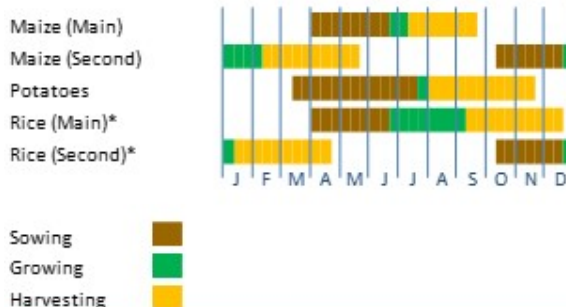
Cereal import requirements forecast at slightly above-average levels in 2022/23 marketing year (July/June)

Cereal import requirements in the 2022/23 marketing year (July/June) are forecast at 10 million tonnes, slightly above the five-year average. Imports of wheat are anticipated at 6.3 million tonnes, close to the average level due to sustained demand of

Philippines

Crop Calendar

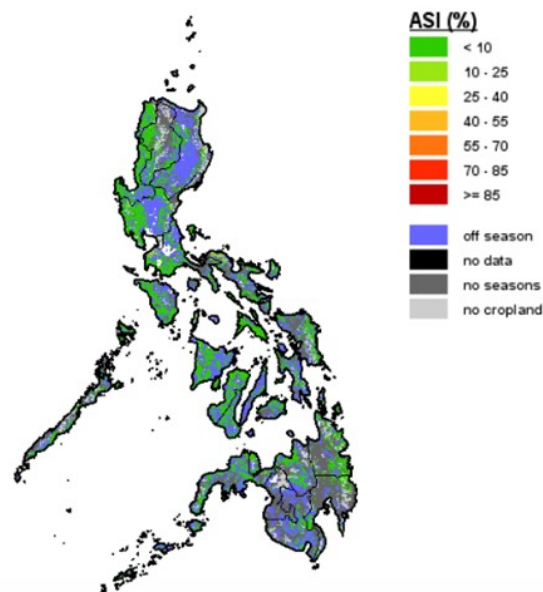
(*major foodcrop)



Source: FAO/GIEWS.

Philippines - Agricultural Stress Index (ASI)

from start of season 1 to dekad 3, September 2022



Source: FAO/GIEWS Earth Observation System.

high quality wheat for milling and low quality wheat for feed. Imports of rice in the 2023 calendar year are expected at 3 million tonnes, 9 percent below the 2022 level. Maize imports are forecast at 800 000 tonnes, considerably above the five-year average, due to strong demand by the feed industry.

Domestic maize prices at high levels in 2022 due to strong demand for feed

Domestic prices of white maize and yellow flour have generally increased since early 2021 and reached record levels in September 2022, supported by the strong demand from the feed industry.

Domestic prices of regular and well-milled rice have been steadily increasing since January 2022 and in September they were above their year-earlier levels mainly due to the elevated costs of agricultural inputs and fuel.

Philippines

Cereal Production

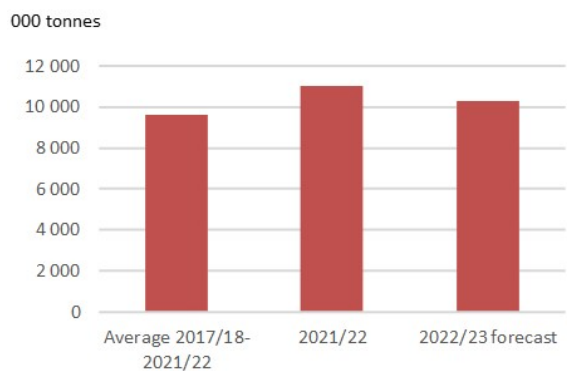
	2017-2021 average	2021	2022 forecast	change 2022/2021
	000 tonnes			percent
Rice (paddy)	19 319	19 922	19 950	0.1
Maize	8 017	8 300	8 300	0.0
Sorghum	1	1	1	66.7
Total	27 337	28 223	28 251	0.1

Note: Percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Philippines

Cereals Imports

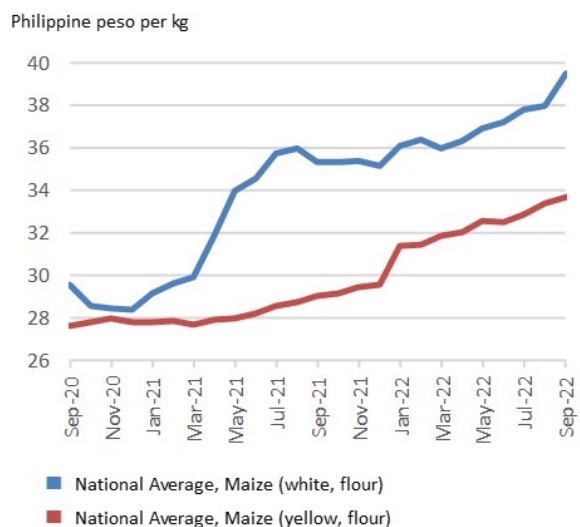


Notes: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Philippines

Selected retail maize prices

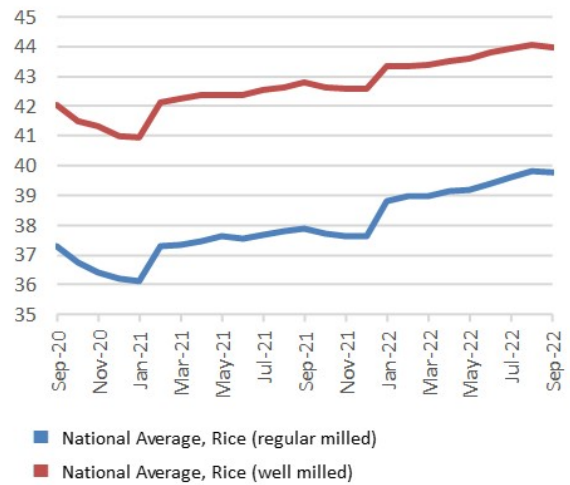


Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

Philippines

Selected retail rice prices

Philippine peso per kg



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



GIEWS Country Brief The Philippines

Reference Date: 07-April-2021

FOOD SECURITY SNAPSHOT

- Cereal production in 2020 forecast above five-year average
- Above-average cereal imports forecast for 2020/21 marketing year (July/June)
- Pig population in 2020 decreased sharply due to extensive outbreaks of African Swine Fever
- Prices of rice decreasing since June 2020; prices of pig meat at high levels in first quarter of 2021
- Effects of COVID-19 pandemic increased poverty

Cereal production in 2020 forecast above five-year average

Harvesting of the 2020 secondary paddy and maize crops is underway and production prospects are generally favourable. The ongoing October-May dry season has been characterized by unusual high amounts of precipitation over most parts of the country that, together with an adequate supply of irrigation water, supported planting operations and had a positive impact on crop development (see ASI map). Rainfall amounts in mid-January were exceptionally abundant in Region VI (Western Visayas), Region VIII (Eastern Visayas) and in parts of Mindanao Island, causing localized floods and some damages to crops.

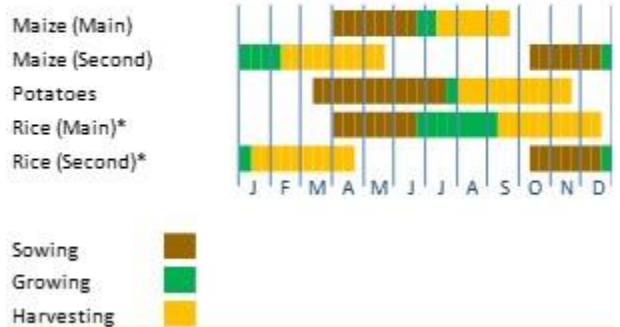
The harvest of the 2020 main paddy crop was concluded last December and the output is officially estimated at record 11.1 million tonnes. Government support to production consisted of provision of high-quality seeds, concessionary credit and training. The 2020 June-October monsoon season was favourable over most cropping areas, benefitting yields. Localized crop losses were caused by heavy rainfall, strong winds and floods following the passage of three consecutive typhoons between late October and November 2020 over parts of the Luzon Island and of the Region IV (Calabarzon). Overall, the aggregate 2020 paddy production is forecast at 19.7 million tonnes, 6 percent above the five-year average.

The 2020 main maize crop was harvested last September and the output is estimated above the five-year average, reflecting large plantings, supported by the steady demand of the feed industry and above-average yields, following abundant monsoon rains. Overall, the aggregate 2020 maize output is estimated at 8.1 million tonnes, 6 percent above the five-year average.

Philippines

Crop Calendar

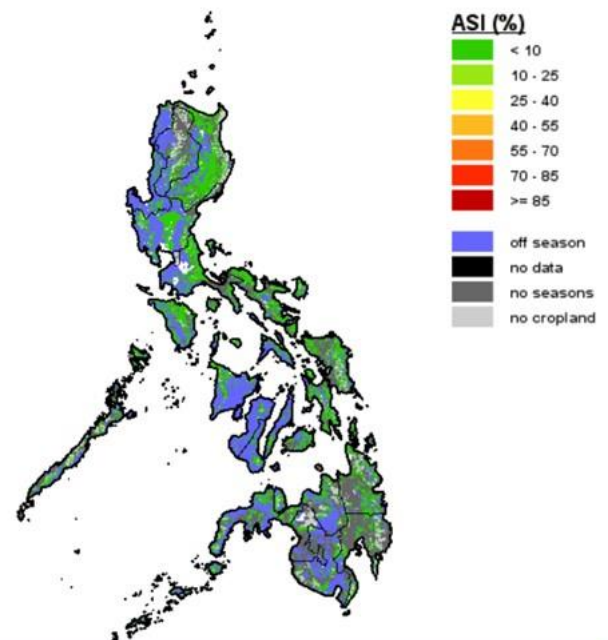
(*major foodcrop)



Source: FAO/GIEWS.

Philippines - Agricultural Stress Index (ASI)

from start of season 1 to dekad 1, March 2021



Source: FAO/GIEWS Earth Observation System.

Above-average cereal import requirements forecast for 2020/21 marketing year (July/June)

Aggregate cereal import requirements in the 2020/21 marketing year (July/June) are forecast at 9.4 million tonnes, well above the five-year average.

Imports of wheat in the 2020/21 marketing year (July/June) are forecast at 6.2 million tonnes, slightly above the previous year's high level due to sustained demand of high-quality wheat for milling and low-quality wheat for feed. Imports of rice in the 2021 calendar year are expected to reach 2.7 million tonnes, 10 percent more than in 2020. Maize import requirements in the 2020/21 marketing year are forecast at 900 000 tonnes, considerably above the five-year average, due to strong demand by the feed industry.

Pig population decreased sharply in 2020 due to extensive outbreaks of African Swine Fever

According to the Department of Agriculture (DA), as of mid-March, the African Swine Fever (ASF)^{1/} was present in 12 out of the 17 regions of the country and more than 3 million pigs have died or have been culled due to ASF. According to official information, the country's pig population was estimated at 9.7 million animals in 2020, 25 percent below the 2019 high level and well below the five-year average. On 18 March 2021, the DA recommended to declare a [national state of emergency](#) in order to prevent a further spread of ASF.

Prices of rice decreasing since June 2020; prices of pig meat at high levels in first quarter of 2021

Domestic prices of regular and well-milled rice have been steadily decreasing since June 2020, mainly reflecting improved market availabilities from the 2020 harvests and above-average imports.

The prices of pig meat, the most consumed meat type in the country, soared between September 2020 and January 2021, reaching record levels in January, reflecting concerns about the impact of ASF on domestic production. Subsequently, pig meat prices showed signs of softening in February and March 2021 but remained 35 percent higher than a year earlier.

Effects of COVID-19 pandemic increased poverty

According to the Philippine Statistics Authority, the Gross Domestic Product contracted by 8.1 percent in 2020, after an average growth of 6.6 percent per year in the previous five years. The economic downturn resulted in widespread income losses, limiting the capacity of vulnerable households to purchase food. According to the World Bank, 25 million people (about 20 percent of the total population) were living in poverty in 2020, with an increase of 2.7 million people compared to 2019.

^{1/} African Swine Fever is highly contagious and lethal disease affecting pigs and wild boars.

Philippines

Cereal Production

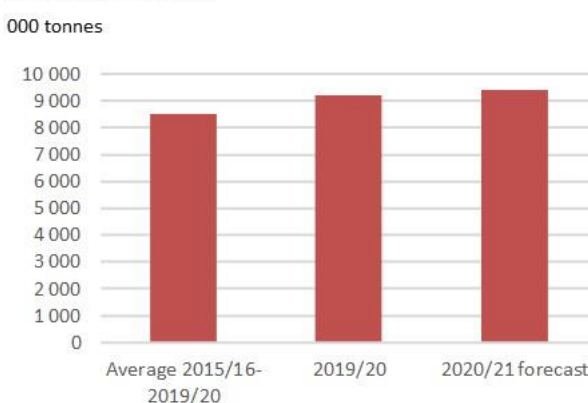
	2015-2019 average	2019	2020 estimate	change 2020/2019
	000 tonnes			percent
Rice (paddy)	18 599	18 929	19 700	4.1
Maize	7 681	7 979	8 119	1.8
Sorghum	1	1	1	0.0
Total	26 280	26 908	27 819	3.4

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Philippines

Cereals Imports

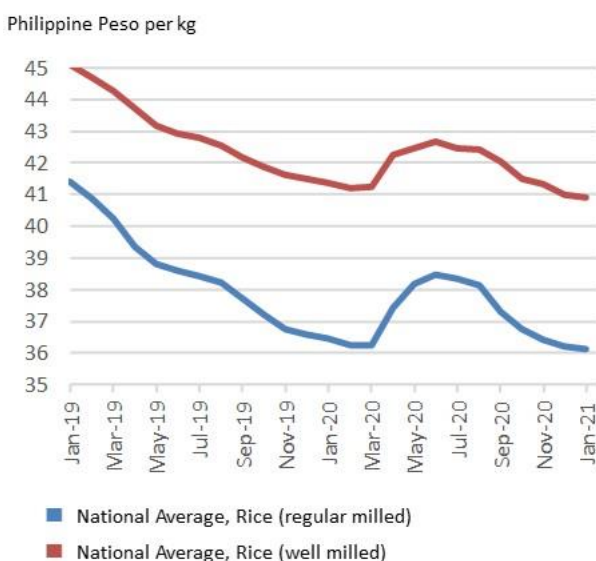


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Philippines

Selected retail rice prices

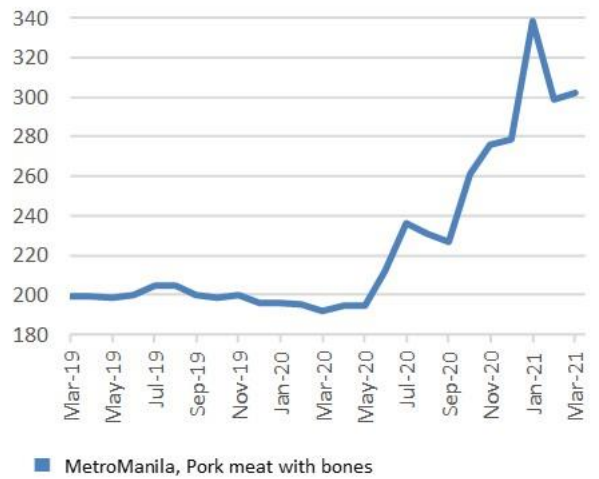


Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

Philippines

Retail pork prices

Philippine Peso per kg



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



GLEWS Country Brief The Philippines

Reference Date: 12-June-2020

FOOD SECURITY SNAPSHOT

- Harvested area of 2020 main paddy crop forecast at near-average level
- Cereal production in 2019 forecast at average level
- Above-average cereal imports forecast for 2020/21 marketing year (July/June)
- Prices of rice increased in April and May 2020 but remained below year-earlier levels

Harvested area of 2020 main paddy crop forecast at near-average level

Planting operations of the 2020 main paddy crop is underway and is expected to continue until August in some areas. The harvest of the early-planted crops will begin in July. Rainfall was generally below average over the main producing areas in April, leading to some delay in planting. Rains improved since early May allowing planting operations to resume in most areas and benefitting crop establishment. As of mid-May, remote sensing data shows average to above-average vegetation conditions throughout most of the country, except in the provinces of Sultan Kudarat and South Cotabato located in southern Mindanao (see ASI map). Despite the low market prices, which are prompting farmers to switch to crops that are more remunerative, the harvested area is expected to contract only marginally compared to the average levels. This is due to the Government's support in terms of provision of high quality seeds, concessionary credits and training. The Government is also investing in farm mechanization and irrigation infrastructure in order to enhance paddy productivity. The 2020 secondary paddy crop will be planted towards the end of the year.

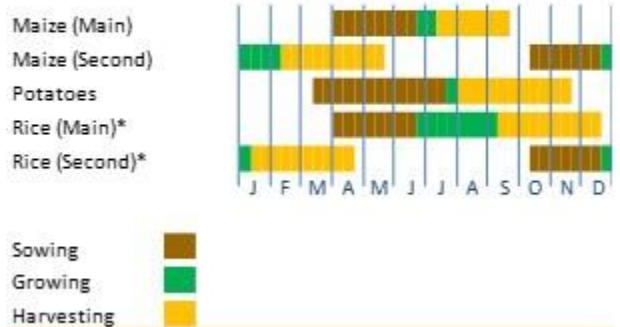
Planting of the 2020 main maize crop is nearing completion and harvesting of early-planted crops is expected to start in July. The area planted increased to record levels, supported by strong demand from the poultry industry. The 2020 secondary maize crop will be planted from October onwards.

In mid-May 2020, the country was also hit by Typhoon Ambo (International Name: Vongfong) that brought heavy to intense rainfall in the different regions of the country resulting in an estimated agricultural damage of PHP 1.14 billion (USD 22 million) most of which are high value crops. About 20 650 hectares of agricultural areas were damaged in Central Luzon, CALABARZON and Eastern Visayas.

Philippines

Crop Calendar

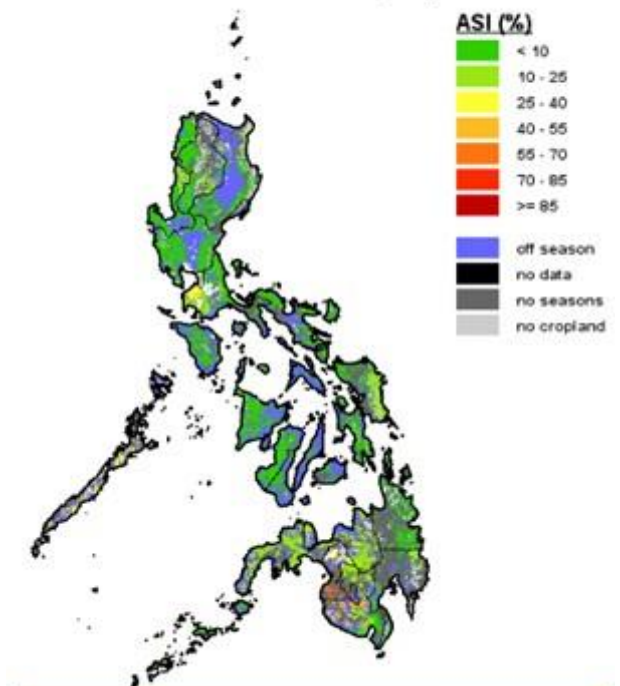
(*major foodcrop)



Source: FAO/GIEWS.

Philippines - Agricultural Stress Index (ASI)

from start of season 1 to Dekad 2, May 2020



Source: FAO/GIEWS Earth Observation System.

Cereal production in 2019 forecast at average level

The 2019 cropping season will conclude by June 2020 and production is forecast at 26.9 million tonnes, slightly above the five-year average. The 2019 aggregate production of paddy rice is forecast at 18.8 million tonnes, close to average levels. The harvested area of both main and secondary paddy crops is estimated to have contracted compared with the previous year's level as farmers shifted paddy land to other crops due to the low farm gate prices. Weather conditions were overall conducive during the critical development stages of the main season crops and irrigation water supplies were adequate for secondary crop development. The 2019 production of maize is estimated at 8.1 million tonnes, 5 percent above the five-year average, mainly reflecting the high level of plantings, supported by strong demand from the feed industry and above-average yields.

Above-average cereal imports forecast for 2019/20 marketing year (July/June)

Aggregate cereal import in the 2019/20 marketing year (July/June) are forecast at 10.4 million tonnes, well above the five-year average after the steady increases registered since 2016/17.

Imports of wheat in the 2019/20 marketing year (July/June) are forecast at 7.2 million tonnes, close to the previous year's high level, due to sustained demand for high quality wheat for milling and lower quality for feed. Imports of rice in the 2020 calendar year are expected at 2.8 million tonnes, up 3 percent from 2019, mostly reflecting strong domestic demand. Maize import requirements in the 2019/20 marketing year (July/June) are forecast at 600 000 tonnes, close to the five-year average.

Prices of rice increased since April, supported by strong local demand due to COVID-19

Prices of regular and well-milled rice increased in April and May 2020, after a protracted declining trend since late 2018, mainly due to hoarding and panic-buying due to the COVID-19 pandemic. However, average rice prices in May were below their year-earlier levels reflecting adequate market supplies from the near-average 2019 production and high level of imports.

Philippines

Cereal Production

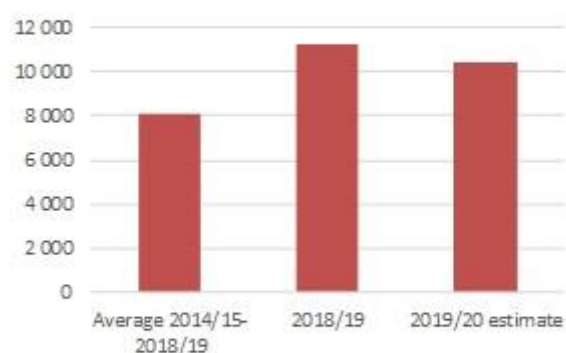
	2014-2018 average	2018	2019 estimate	change 2019/2018
	000 tonnes			percent
Rice (paddy)	18 595	18 622	18 805	1.0
Maize	7 608	7 619	8 050	5.7
Sorghum	1	1	1	66.7
Total	26 204	26 241	26 856	2.3

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

Philippines

Cereals Imports

000 tonnes



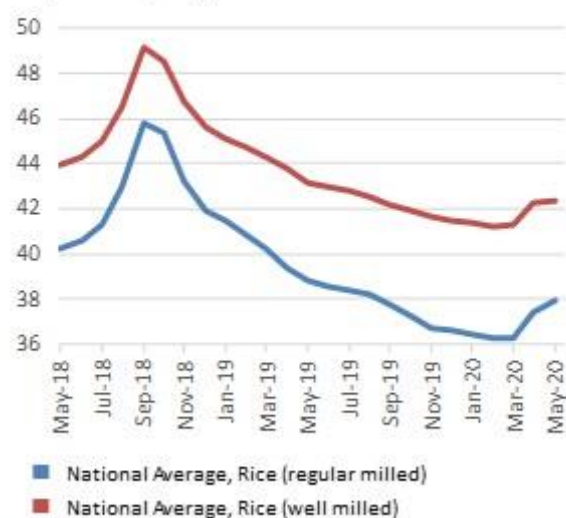
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Philippines

Selected retail rice prices

Philippine Peso per kg



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

COVID-19 and measures adopted by the Government

Starting from 16 March 2020 and until further notice, as a measure to prevent the spread of the virus, the Government imposed restrictions on international and national flights, prohibited large gatherings of people and closed schools and universities. Productive and commercial activities along the food value chain have been allowed to operate amid the lockdown restrictions, with special transport permits granted for the movement of food items, agricultural inputs and labourers.

On 9 April 2020, the Government launched a four-pillar socio-economic programme (officially called “The Duterte Administration’s Philippine Programme for Recovery with Equity and Solidarity” or PH-PROGRESO) against COVID-19. This economic recovery programme transitions the “Bayanihan to Heal as One” Law enacted in 23 March 2020, declaring the country in national emergency from COVID-19. The PH-PROGRESO includes fiscal and monetary measures as well as increased financial resources to strengthen the health sector and provide extra support to vulnerable households.

On 19 May 2020, the Government announced plans to allocate about PHP 595.6 billion (USD 11.9 billion) for the emergency support to vulnerable groups. These measures include:

- A PHP 205 billion (USD 4.1 billion) cash support programme availed by 12 million low-income households. Each household is eligible to receive cash transfers of between PHP 5 000 (USD 100) and PHP 8 000 (USD 160) per month for a period of two months. An additional 5 million households will be identified for the second tranche.
- PHP 59.9 billion (USD 1.18 billion) social protection measures for vulnerable workers, including
 - PHP 51 billion (USD 1.02) wage subsidy for employees of small business.
 - PHP 1.5 billion (USD 30 million) for overseas Filipinos.
 - PHP 3.2 billion (USD 64 million) to the Department of Labour and Employment for assistance to the affected formal workers.
 - PHP 3 billion (USD 60 million) to the Department of Agriculture for cash assistance to rice farmers.
 - PHP 1.2 billion (USD 24 million) to the Social Security System for unemployment benefits.
 - PHP 123.7 billion (USD 2.44 billion) for credit support to small businesses and support to the agriculture sector.
 - PHP 16.5 billion for the support to the rice programmes to increase productivity and boost buffer stocks

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GIEWS Country Brief The Philippines

Reference Date: 02-August-2019

FOOD SECURITY SNAPSHOT

- Conditions of 2019 main cereal crops generally favourable
- Cereal imports in 2019/20 marketing year (July/June) forecast at high level
- Prices of rice steadily decreasing since September 2018

Conditions of 2019 main cereal crops generally favourable

Planting of the 2019 main paddy crop, to be harvested between September and November 2019, was mostly finished by July. Localized below-average rainfall between the end of 2018 and the first half of 2019, associated with weak El Niño conditions, caused delays in planting activities. So far, the June-October rainy season has been characterized by well-distributed rainfall in most main producing paddy areas, including northern and central Luzon provinces, mitigating moisture deficits and benefitting planting activities. Remote sensing data shows average to above-average vegetation conditions over most of the country (see ASI map). The area planted is estimated to be above the five-year average, reflecting strong domestic demand for rice as well as the support provided by the Government to increase paddy production. Since the start of the year, the National Rice Programme of the Department of Agriculture has delivered assistance to farmers, including provision of high-yielding seeds, investment in irrigation schemes and technical training.

Harvesting of the 2019 main maize crop started recently and production is expected to be slightly above the five-year average level, reflecting favourable weather conditions that benefited crop development and boosted yields.

Cereal imports in 2019/20 marketing year (July/June) forecast at high level

Aggregate cereal import requirements in the 2019/20 marketing year (July/June) are forecast at 10.3 million tonnes, about 30 percent above the five-year average and close to the previous year's high level.

Wheat import requirements in the 2019/20 marketing year (July/June) are forecast at 6.5 million tonnes, 17 percent above the five-year average, due to the sustained demand for high quality wheat for milling and low quality wheat for feed use. Import requirements of rice in the 2019 calendar year are

Philippines

Crop Calendar (*major foodcrop)

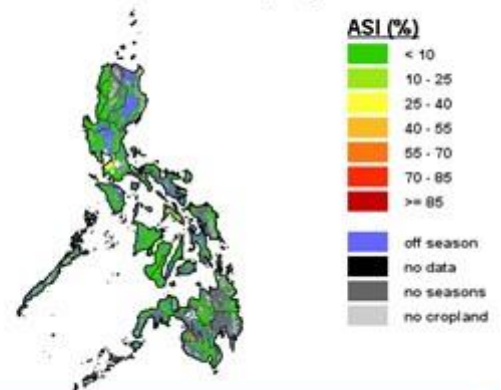


Sowing
Growing
Harvesting

Source: FAO/GIEWS.

Philippines - Agricultural Stress Index (ASI)

From start of season 1 to dekad 1, July 2019



Source: FAO/GIEWS Earth Observation System.

forecast at 2.8 million tonnes, well above the five-year average, reflecting strong domestic demand and the lift of import quotas. Early in 2019, the Government enacted the Rice Tariffication Law, which replaced quantitative restrictions of rice imports with increased tariffs (see [FPMA Food Policies](#)). Maize import requirements in the 2019/20 marketing year (July/June) are forecast at 750 000 tonnes, 16 percent above the five-year average, reflecting growing demand from the feed industry.

Prices of rice steadily decreasing since September 2018

Prices of regular and well-milled rice decreased steadily between October 2018 and July 2019, after they reached a record high in September 2018, amid increased fuel prices and low public inventories. The declines mainly reflect the improved market availabilities from the 2018 harvests and well above-average imports. Overall, prices of rice in July 2019 were about 5 percent below their year earlier values.

Philippines

Cereal Production

	2013-2017 average	2017	2018 estimate	change 2018/2017
	000 tonnes			percent
Rice (paddy)	18 635	19 420	18 997	-2.2
Maize	7 560	7 915	7 772	-1.8
Sorghum	1	1	1	0.0
Total	26 196	27 336	26 770	-2.1

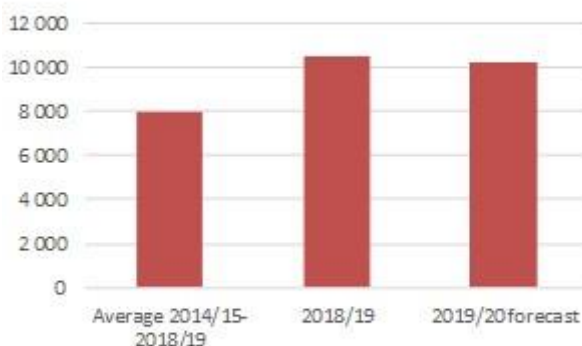
Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Philippines

Cereals Imports

000 tonnes



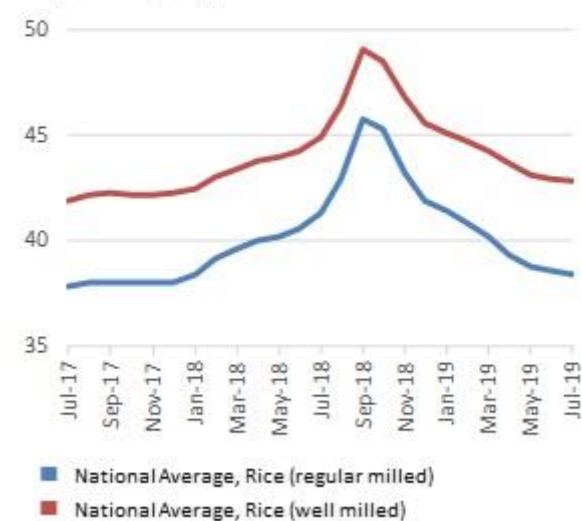
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Philippines

Selected retail rice prices

Philippine Peso per kg



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

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GIEWS Country Brief The Philippines

Reference Date: 25-January-2019

FOOD SECURITY SNAPSHOT

- Paddy production in 2018 forecast near record level of 2017
- Cereal imports in 2018/19 marketing year (July/June) forecast at record level
- Despite further decrease in December, prices of rice still significantly higher than year before
- Concerns about food security conditions remain for population affected by Typhoon Mangkhut and Tropical Depression Usman

Paddy production in 2018 forecast near record level of 2017

Harvesting of the 2018 main paddy crop finalized in December, while harvesting of the 2018 secondary paddy crop is expected to be completed by April 2019. Overall, production prospects for the 2018 paddy crops are positive. Near-record plantings for the main and secondary crops are expected to fully offset some localized crop losses caused by the passage of Typhoon Mangkhut over parts of north and central Luzon and of Tropical Depression Usman over parts of regions IV-A, V and VIII. Aggregate 2018 paddy output is forecast at 19.3 million tonnes, 4 percent above the five-year average and close to the record level in 2017.

Harvesting of the 2018 main maize crop finalized in September, while the 2018 secondary maize crop is expected to be harvested between February and May 2019. The 2018 aggregate maize output is forecast at a record of 8.2 million tonnes, about 8 percent higher than the five-year average, as adequate supply of water for irrigation and a higher use of high quality seeds significantly increased yields.

Some concerns remain about the 2018 secondary paddy and maize crops output as the latest forecast from the International Research Institute (IRI) for Climate Change and Society indicates high probabilities of the occurrence of an El Niño event in 2018/19 and forecasts below-average rains in most of the country until February.

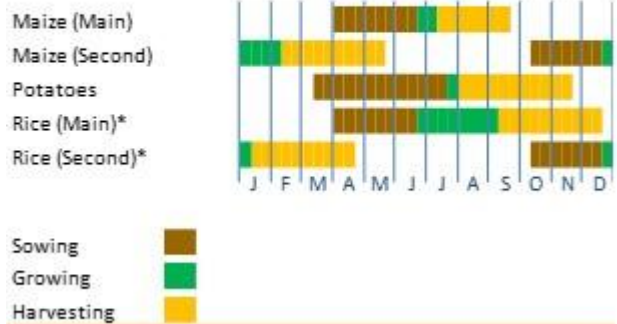
Cereal imports in 2018/19 marketing year (July/June) forecast at record level

Aggregate cereal import requirements in the 2018/19 marketing year (July/June) are forecast at a record of 8.8 million tonnes, about 28 percent above the five-year average level. Import

Philippines

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Philippines

Cereal Production

	2013-2017 average	2017	2018 forecast	change 2018/2017
	000 tonnes			percent
Rice (paddy)	18 635	19 420	19 330	-0.5
Maize	7 560	7 915	8 200	3.6
Sorghum	1	1	1	0.0
Total	26 196	27 336	27 531	0.7

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

requirements of rice in 2018/19, which account for the bulk of the increase, are forecast at 2.3 million tonnes, about 75 percent above the five-year average, owing to the increased need to replenish rice public inventories in order to stabilize prices and contain inflation.

Wheat import requirements in 2018/19 are forecast at a record of 5.8 million tonnes, close to last year's high level but 17 percent above the five-year average, owing to increasing demand for both high quality wheat for milling and low quality wheat for feed use. Maize import requirements in 2018/19 are forecast at 700 000 tonnes, virtually unchanged from last year's near-average level.

Despite further decrease in December, prices of rice still significantly higher than year before

Prices of regular and well-milled rice declined for the third consecutive month in December 2018, reflecting improved supplies due to the commercialization of the 2018 main paddy crops as well as increased imports. Nevertheless, prices in December were still about 10 percent higher than a year earlier following an upward trend since the beginning of 2018, which reached a record high value in September 2018, amid increased fuel prices and low public inventories.

Concerns on food security conditions of populations struck by Typhoon Mangkhut

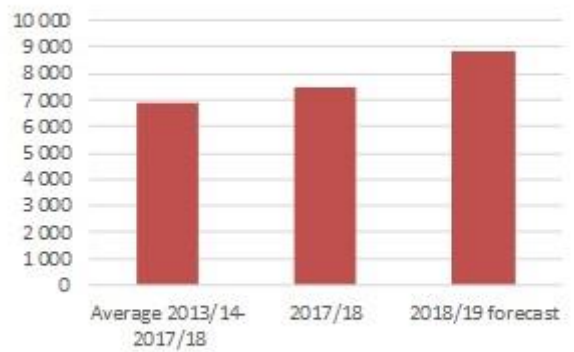
The country is generally food secure. However, concerns remain for populations affected by the passage, in September 2018, of category 5 Typhoon Mangkhut in central and northern Luzon, mainly impacting regions I, II, III, CAR and IV-A, which affected about 2.1 million people. Additionally, the passage of Tropical Depression Usman in December 2018 brought heavy rainfalls that triggered floods and landslides and affected about 300 000 people in regions IV-A, V and VIII.

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Philippines

Cereals Imports

000 tonnes



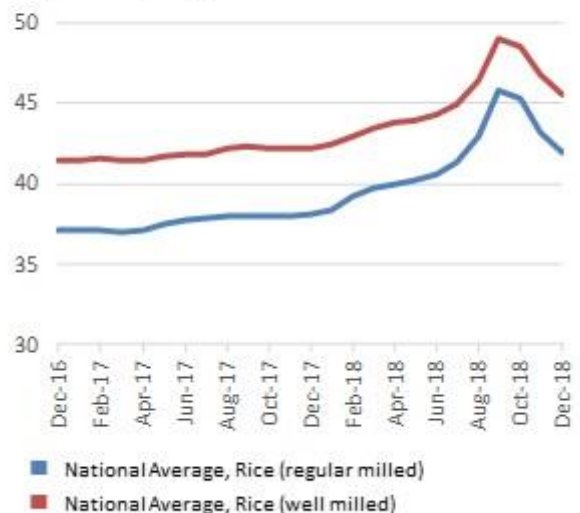
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Philippines

Selected retail cereal prices

Philippine Peso per kg



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



GIEWS Country Brief The Philippines

Reference Date: 05-April-2018

FOOD SECURITY SNAPSHOT

- Cereal production in 2017 forecast close to last year's high level
- Cereal imports in 2017/18 marketing year (July/June) forecast at near-record level
- Prices of rice on increase since February
- Typhoon Tembin severely affected large number of people in Mindanao Island

Cereal production in 2017 forecast close to last year's high level

Harvesting of the 2017 secondary rice crop, accounting for about 45 percent of the annual production, is underway and is expected to continue in some areas until June. Preliminary official forecasts indicate a record output of 8.7 million tonnes, slightly above the previous year's bumper level. This would be primarily driven by higher yields, reflecting adequate irrigation water supplies and an increase in the use of high-yielding seeds and fertilizers provided through Government programmes. Taking into account the official estimates of the 2017 main crop, already harvested during the second semester of last year, the aggregate paddy production in 2017 is officially forecast at a record level of 19.4 million tonnes, 5 percent above the 2016 output.

Harvesting of the 2017 secondary maize crop is currently underway and will continue until May, while the 2017 main crop was already harvested last year. According to latest official forecasts, the 2017 aggregate maize production is set at an above average level of 7.6 million tonnes. The expected production is about 6 percent below last year's record level reflecting a shift of area from maize to rice and limited availability of seeds. Localized damage to the 2017 secondary maize crop was caused by the passage of Typhoon Temblin in late December 2017, but overall the impact was limited.

Cereal imports in 2017/18 marketing year forecast at near-record level

Total cereal imports in the 2017/18 marketing year (July/June) are forecast at a near-record level of 7.2 million tonnes. Rice imports are forecast at 1.4 million tonnes in the 2018 calendar year, nearly 400 000 tonnes above the previous year's level, reflecting the State efforts to restore the public stocks. Wheat imports in the 2017/18 marketing year (July/June) are forecast to



Philippines Cereal production

	2012-2016 average	2016	2017 forecast	change 2017/2016
	000 tonnes			percent
Rice (paddy)	18 379	18 550	19 416	5
Maize	7 486	8 047	7 600	-6
Sorghum	0	0	0	0
Others	0	0	0	0
Total	25 865	26 597	27 016	2

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

remain close to last year's high level at 5.5 million tonnes, owing to continuing strong demand for both high quality wheat for milling and low quality wheat for feed. Maize imports are forecast to surpass last year's below-average level and reach 430 000 tonnes, reflecting expectations of a decreased output.

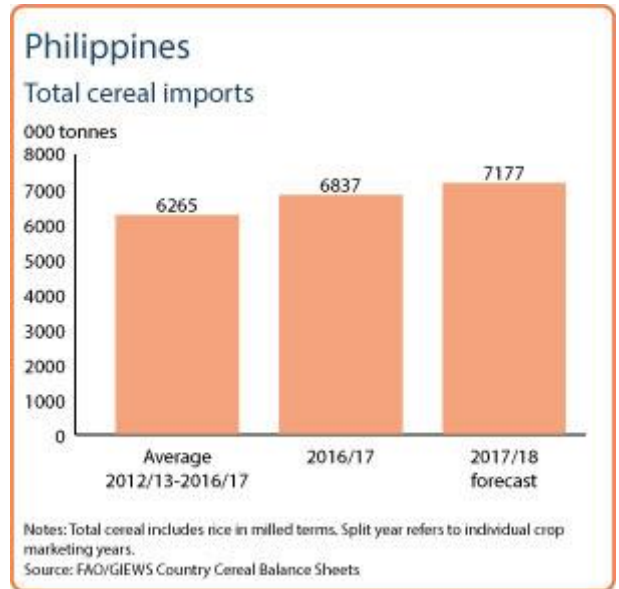
Prices of rice on increase since February

The national average price of regular and well-milled rice varieties increased marginally for the second consecutive month in March, following a long period of stability. These increases were likely influenced by a rise in fuel prices in January, however, ample market supplies following the good 2017 crop prevented steeper price increases.

Typhoon Tembin severely affected large number of people in Mindanao Island

In December 2017, Typhoon Tembin (Vinta) caused flash floods and landslides in the southern Island of Mindanao, with damages to housing, infrastructures and affecting the agriculture and fisheries sectors. According to official estimates, some 800 000 people were severely affected, mostly concentrated in Zamboanga Region in Northern Mindanao as well as in Davao Region and Autonomous Region in Muslim Mindanao. Damages to agriculture are estimated at USD 64.4 million, with the major losses in the maize and rice sectors.

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GIEWS Country Brief The Philippines

Reference Date: 21-June-2017

FOOD SECURITY SNAPSHOT

- **Cereal production in 2017 forecast close to last year's high level**
- **Cereal imports in 2017/18 marketing year (July/June) forecast to expand to record level**
- **Prices of rice generally stable in recent months**
- **Large number of people affected by typhoons and El Niño in 2016**

Cereal production in 2017 forecast close to last year's high level

Planting of the 2017 main season rice crop, accounting for about 55 percent of the annual production, is underway. Remote sensing data indicates near-normal rainfall since the first dekad of April over most of the country, which has supported planting operations and early crop development. Rainfall amounts and distribution in the forthcoming months are critical to determine the performance of the 2017 main and secondary paddy crops. Assuming normal weather conditions for the remainder of the season, FAO preliminarily forecasts the 2017 aggregate paddy production at 18.6 million tonnes.

The 2017 secondary season maize production, harvested in May, is officially estimated to have increased to 3.7 million tonnes, reflecting both higher plantings and yields. Considering the gains from the secondary harvest and assuming a normal 2017 main season crop, FAO preliminarily forecasts the 2017 aggregate maize production at 8.3 million tonnes, 3 percent above the last record level.

Cereal imports in 2017/18 marketing year forecast to expand to record level

Total cereal imports in the 2017/18 marketing year (July/June) are forecast at 7.6 million tonnes, 5 percent above last year's high level. Rice purchases are forecast at 1.5 million tonnes in the 2017 calendar year, up from a three-year low of 740 000 tonnes in 2016. Wheat imports in the 2017/18 marketing year (July/June) are forecast at 5.5 million tonnes, close to last year's high level, reflecting continuing high demand for both high-quality wheat for milling and low-quality wheat for animal feeding. By contrast, maize imports in 2017/18 are forecast to drop by 25 percent to 300 000 tonnes compared with last year's level, in line with expectations of increased output.



Philippines Cereal production

	2012-2016 average	2016	2017 forecast	change 2017/2016
	000 tonnes			percent
Rice (paddy)	18 374	18 528	18 570	0
Maize	7 489	8 065	8 300	3
Sorghum	0	0	0	0
Others	0	0	0	0
Total	25 864	26 593	26 870	1

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

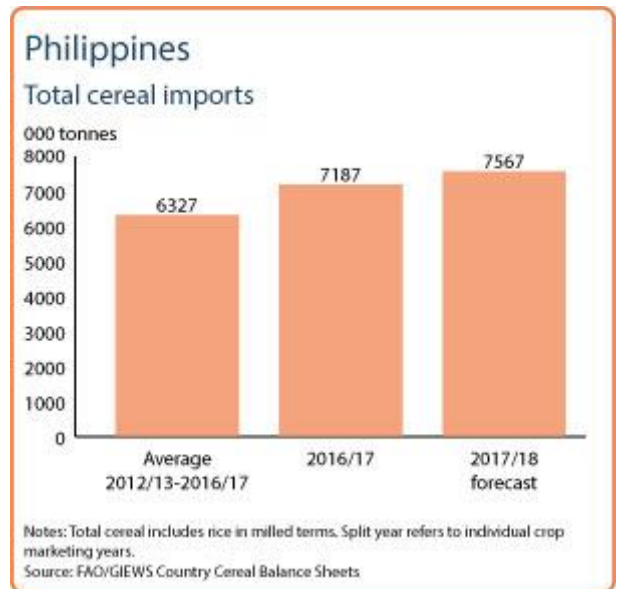
Prices of rice generally stable in recent months

The national average prices of regular and well-milled rice varieties remained stable in recent months reflecting adequate domestic availabilities. Overall, rice prices in May 2017 were close to their year-earlier levels.

Large number of people affected by typhoons and El Niño in 2016

In October 2016, central and northern parts of Luzon Island were struck by two typhoons in close succession. Strong winds, heavy rains and localized floods affected at least 1.5 million people and caused loss of life, damages to housing and infrastructure, mostly concentrated in Ilocos Region, Cagayan Valley, Central Luzon and Cordillera Administrative Region were the most affected. In addition, over 400 000 farming households were affected by drought and dry spells associated with 2015/16 El Niño phenomenon. Most of the population affected by the typhoons is critically dependent on agriculture for their livelihoods and many are vulnerable to food insecurity.

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GIEWS Country Brief The Philippines

Reference Date: 16-November-2016

FOOD SECURITY SNAPSHOT

- Typhoons Sarika and Haima have negatively affected central and northern parts of Luzon, but overall impact on 2016 cereal crops expected to be limited
- Cereal import requirements in 2016/17 marketing year (July/June) forecast to remain high
- Prices of rice stable in recent months
- Typhoons negatively impacted livelihoods and food security of affected households

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

In mid-October, central and northern parts of Luzon Island were struck by two typhoons in close succession, Typhoon Sarika, a Category 4 event on 16 October and Typhoon Haima, a Category 5 event on 19 October. Strong winds, heavy rains and localized floods caused loss of life, damage to housing, infrastructure and agricultural sector. Although a comprehensive damage evaluation is not yet available, preliminary official estimates indicate that, as of 4 November, about 400 000 hectares of paddy, maize and high value crops (such as mango, banana, papaya, cassava and vegetables) were adversely affected by both typhoons. The overall damage to the agriculture sector was estimated to be close to USD 234 million. Hardest hit was the rice sector, followed by those of high value crops and maize. At the time of the typhoons, harvesting of the 2016 main season paddy crop, representing 55 percent of the annual production, was ongoing, while planting of the mostly irrigated 2016/17 secondary season crop was about to commence. The latest official estimates indicate that over 343 000 hectares of paddy crops were affected, mainly in Region I (Ilocos Region), Region II (Cagayan Valley), Region III (Central Luzon), Region IV-A (Calabarzon), Region V (Bicol Region) and Cordillera Administrative Region (CAR). The affected area represents 13 percent of the estimated total area planted to the 2016 main season rice crop, out of which about 71 000 hectares, some 3 percent, were reportedly lost. Although significant localized crop losses are likely in the most affected areas, the overall impact on the 2016 main season paddy output is expected to be limited, particularly considering the otherwise favourable weather conditions during most of the season. Furthermore, the forecasted increase in the secondary season crop is anticipated to compensate for losses to the main season



**Philippines
Cereal production**

	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Rice (paddy)	18 068	17 473	18 680	7
Maize	7 271	6 966	7 800	12
Others	0	0	0	0
Total	25 339	24 439	26 480	8

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

crop. Assuming average growing conditions during the remainder of the season, FAO's production outlook remains positive, pointing to an aggregate paddy harvest of 18.7 million tonnes. This level would stand 7 percent above the 2015 outcome, which was affected by dry conditions associated to El Niño.

Damage to the 2016 main season maize crop is also expected to be limited as the harvest was virtually completed by mid-September. As a result and assuming normal weather conditions for the remaining of the season, FAO forecast the 2016 maize output at 7.8 million tonnes, implying a 12 percent recovery from dry weather-reduced harvest in 2015.

The 2015/16 El Niño anomaly, which negatively affected on 2015/16 crops in the Philippines, dissipated in June. According to the World Meteorological Organization, atmospheric conditions now point to a 50-60 percent likelihood of a weak La Niña episode during the 2016 Northern Hemisphere autumn and persisting through the 2016/17 Northern Hemisphere winter. The phenomenon is historically associated with above-normal rainfall. This could benefit the 2016 secondary season crops, although, excessive rains could also raise the potential for flooding and negatively impacting on the yields.

Cereal import requirements in 2016/17 marketing year forecast to remain high

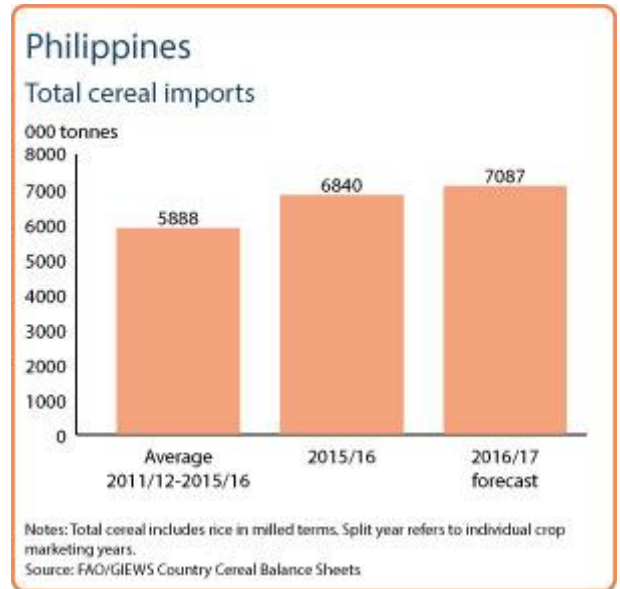
Wheat import requirements in the 2016/17 marketing year (July/June) are forecast at 4.9 million tonnes, 4 percent above last year's high level, reflecting high demand for both high-quality wheat for milling and low-quality wheat for animal feeding. By contrast, FAO forecasts rice import requirements in calendar year 2016 to fall by 32 percent to 1.4 million tonnes, owing to ample domestic availabilities and generally stable domestic quotations. Maize import requirements in 2016/17 are forecast to remain at last year's level of 600 000 tonnes.

Prices of rice stable in recent months

The national average prices of regular and well-milled rice varieties remained stable in recent months reflecting adequate domestic availabilities. Overall, rice prices were close to their year-earlier levels.

Typhoons negatively impacted livelihoods and food security of affected households

According to the latest official estimates at least 1.5 million people have been negatively affected by the recent typhoons, mainly concentrated in Ilocos Region, Cagayan Valley, Central Luzon and CAR. Large numbers of people are still living in temporary shelters and relying on humanitarian support. Most of the population affected by the typhoons is critically dependent on agriculture for their livelihoods and many are vulnerable to food insecurity. Overall, over 170 000 farmers were negatively affected. It is critical that affected farmers receive appropriate and timely agricultural assistance, including rice and maize seeds for planting of the 2016/17 secondary season crops, irrigation tools, fertilizers for rice and maize crops, as well as, equipment for planting and harvesting, together with the provision of storage facilities.





GIEWS Country Brief The Philippines

Reference Date: 25-July-2016

FOOD SECURITY SNAPSHOT

- Cereal production in 2016 forecast to recover from last year's reduced level
- Wheat imports in 2016/17 marketing year (July/June) to remain high
- Prices of rice stable in recent months

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

Planting of the 2016 main paddy crop, which accounts for about 55 percent of the annual production, is ongoing. Despite some delays, monsoon rains improved over most of the country from late May, benefiting planting activities and early crop development. Assuming normal growing conditions prevail, FAO forecasts the aggregate 2016 paddy production (including the ongoing main and the forthcoming secondary crops) at 18.7 million tonnes, implying a 7 percent recovery from the 2015 weather-reduced level and close to the 2014 record. Similarly, assuming normal weather, FAO anticipates the 2016 maize output at 7.6 million tonnes, 9 percent above last year's reduced output.

The 2015/16 El Niño anomaly has dissipated. Atmospheric conditions now point to a 55-60 percent likelihood of a La Niña episode towards the end of 2016 (which would correspond with the planting period of the secondary paddy crop). The phenomenon is historically associated with heavier rainfall. Depending on its intensity, it could benefit 2016 main and secondary season crops, although excessive rains could also raise the potential for flooding.

Cereal production declined in 2015 mainly due to dry weather

Latest official estimates put the 2015 aggregate paddy output at 17.4 million tonnes, 8 percent below the 2014 record output. The decrease resulted from smaller main and secondary season harvests that were negatively affected by a combination of poor rains, insufficient water supplies for irrigation and the passage of typhoons. Similarly, the 2015 maize output is officially estimated to have dropped by 9 percent to 7 million tonnes, because of the prolonged dry weather during the cropping season.



	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Rice (paddy)	18,056	17,409	18,700	7
Maize	7,270	6,964	7,600	9
Others	0	0	0	0
Total	25,326	24,373	26,300	8

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

Wheat imports in 2016/17 marketing year to remain high

Wheat imports in the 2016/17 marketing year (July/June) are forecast at 4.5 million tonnes, close to last year's record level, reflecting high demand for both high-quality wheat for milling and low-quality wheat for animal feeding. FAO forecasts rice imports in calendar year 2016 to fall by almost 20 percent to 1.6 million tonnes. Maize imports, which are relatively small, are forecast to remain at last year's level of 600 000 tonnes in 2016/17.

Prices of rice stable in recent months

The national average prices of regular and well-milled rice varieties remained stable in recent months reflecting adequate availabilities. Overall, rice prices were close to their year earlier levels.



Reference Date: 07-October-2015

FOOD SECURITY SNAPSHOT

- Main season rice output in 2015 to decrease from last year's record due to dry conditions
- Cereal imports in 2015/16 marketing year (July/June) forecast to increase from last year's high level
- Prices of rice stable over past few months

Main season rice output in 2015 to decrease from last year's record due to dry conditions

Harvesting of the 2015 main season rice crop, which accounts for about 55 percent of the annual production, has just started and will continue until mid-December. Planting of the 2015 secondary season rice crop is expected to start in mid-October. Production of the 2015 main season rice crop is forecast to decrease as a result of a contraction in plantings, following below-average rains throughout most of the planting period, coupled with insufficient water supplies for irrigation, which could negatively impact yields. As of July, official reports indicated a large reduction in area planted throughout most of the country, particularly in Cagayan Valley, Central Luzon, Western Visayas, Eastern Visayas, Zamboanga Peninsula and SOCCSKSARGEN. Some additional damage to crops has been caused by the passage of Typhoon "Egay" in July. Based on the unfavourable progress of the ongoing main season crop and considering the uncertainties surrounding the forthcoming 2015/16 secondary season, FAO currently forecasts the 2015 aggregate rice production at 18.3 million tonnes, 3 percent down from the previous year's level. Rainfall performance in the coming weeks will prove crucial in avoiding further yield reductions and determining the availability of irrigation supplies for the secondary season crop.

Harvesting of the 2015 main season maize crop was completed in mid-September. Output decreased slightly as a result of marginally lower plantings and yields following below-average rainfall during the cropping season. As a result, FAO estimates the 2015 aggregate maize production, including 2015 secondary and main season crops, at 7.6 million tonnes, 2 percent below last year's high level.

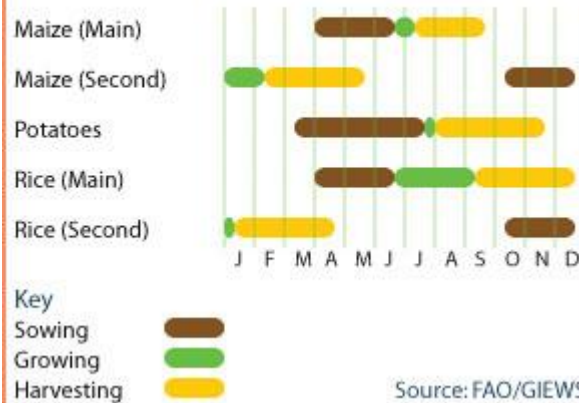
The current dry weather may be attributed to the prevailing global El Niño event, which is often associated with dry weather in the country. Currently, reports from the main meteorological and oceanic institutions forecast that strong El Niño conditions will continue in the coming months and persist into spring 2016.

The FAO's Global Information and Early Warning System will continue to closely monitor the weather situation and assess possible effects on rice production.

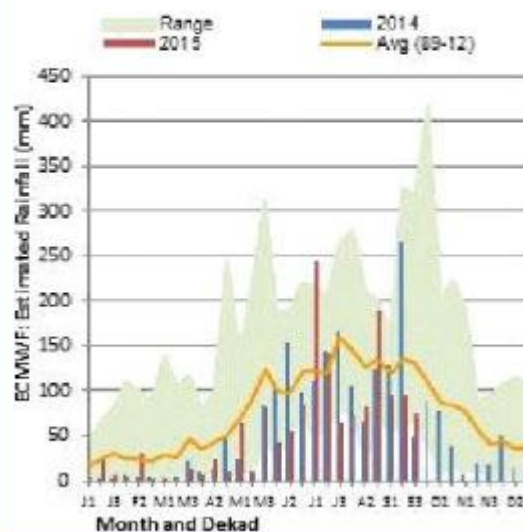
Cereal imports in 2015/16 marketing year forecast to increase from last year's high level

Cereal imports in the 2015/16 marketing year (July/June) are forecast at 6.9 million tonnes, 9 percent up from the 2014/15 high level and

Crop calendar Philippines



Philippines Region III (Central Luzon) - Crop Area



Philippines Cereal production

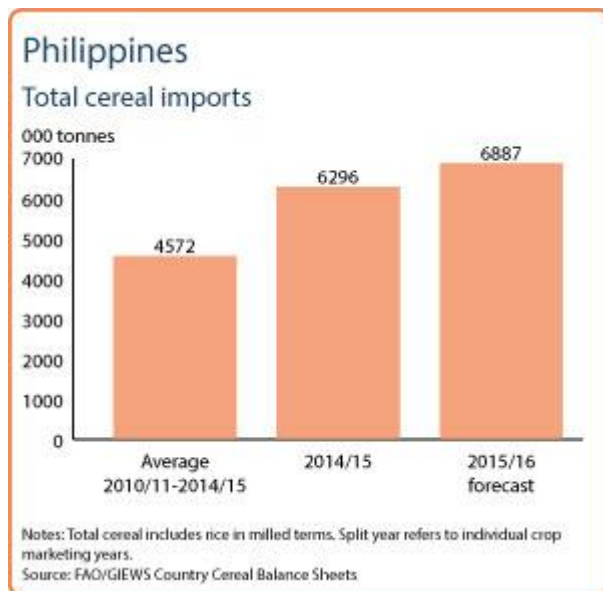
	2010-2014	2014	2015	change
	average		forecast	2015/2014
	000 tonnes			percent
Rice (paddy)	17 919	18 911	18 328	-3
Maize	7 173	7 771	7 619	-2
Others	0	0	0	0
Total	25 092	26 682	25 947	-3

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

51 percent above the average of the past five years. The increase is mainly attributed to higher wheat imports, which are projected to increase by 8 percent from last year's near-record level and reach 4.3 million tonnes, as a result of increased demand from the food and feed industry. Similarly, rice imports in the 2015/16 marketing year (July/June) are forecast to increase to 2.1 million tonnes from the 1.8 million tonnes of last year. By contrast, maize imports are expected to decrease by 4 percent to 500 000 tonnes, due to larger domestic availabilities.

Prices of rice stable over past few months

The national average prices of regular and well-milled rice varieties remained stable in September, with the downward pressure from the beginning of the 2015 main season harvest offset by the expected decline in output, tied to the dry weather. Overall, rice prices were below their high levels of a year earlier.



Reference Date: 11-June-2015

FOOD SECURITY SNAPSHOT

- Uncertain prospects for 2015 main season rice crop due to below-average rains
- Cereal imports in 2014/15 marketing year (July/June) projected to increase from last year's high level
- Prices of rice continued to weaken over past few months

Uncertain prospects for 2015 main season rice crop due to below-average rains

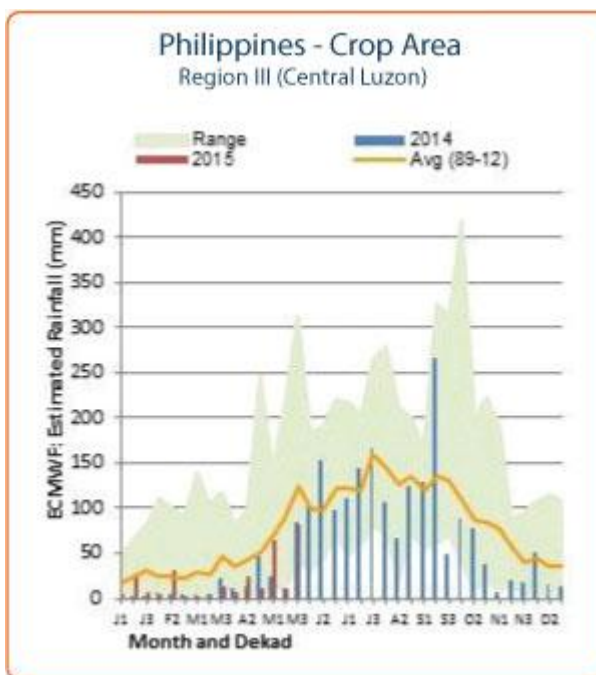
Planting of the 2015 main season rice crop, which is mainly rainfed and accounts for about 55 percent of the annual production is nearing completion. Remote sensing data indicates lower-than-average rainfall in April and May over most of the country, similar to the pattern of the same period last year. The low precipitation may have delayed planting operations and reduced sowings particularly for the rainfed rice crop. The current dry weather may be attributed to the onset of a weak El Niño event this year, as the phenomenon is often associated with below-average precipitation in the country. Yet, considerable uncertainty persists about the intensity and duration of the El Niño event, as well as its impact on crops. Rainfall performance in the following weeks will be crucial for avoiding reductions in plantings and yield potential of the 2015 main season rice crop, to be harvested from mid-September onwards. At this early stage of the season, FAO tentatively projects the 2015 aggregate rice output at around last year's level of 18.4 million tonnes.

Similarly to rice, planting of the 2015 main season maize crop is currently underway under generally below-average rains. Assuming that rains will improve in the forthcoming weeks, FAO preliminarily forecasts the 2015 aggregate maize production at 7.5 million tonnes, 3 percent below last year's high level, as yields are expected to return to average from last year's record.

The FAO's Global Information and Early Warning System will continue to closely monitor the weather situation and assess possible effects on rice production.

Cereal imports in 2014/15 marketing year projected to increase from last year's high level

Cereal imports in the 2014/15 marketing year (July/June) are projected at 5.5 million tonnes, 6 percent above last year's high level and 27 percent up from the previous five-year average. The increase is attributed to higher wheat imports, which are projected to increase by 22 percent from last year's low level and reach 3.3 million tonnes, as a result of increased demand from the food and feed industry. Maize imports are expected to decrease by 17 percent to 500 000 tonnes, due to larger domestic availabilities from the good production in 2014. Rice imports in 2015 are forecast to decline to 1.7 million tonnes from the 1.9 million tonnes of last year.



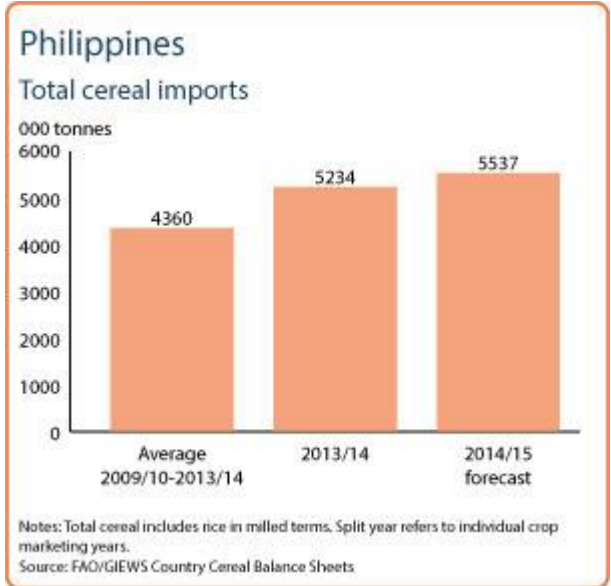
Philippines Cereal production

	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes			percent
Rice (paddy)	17 908	18 854	18 400	-2
Maize	7 173	7 771	7 500	-3
Others	0	0	0	0
Total	25 081	26 625	25 900	-3

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

Prices of rice continued to weaken over past few months

The national average prices of regular and well-milled rice varieties continued to weaken over the past few months, as a result of ample supplies from the 2015 secondary season rice harvest. Overall, rice prices were slightly below their high levels of a year earlier.



Reference Date: 21-May-2015

FOOD SECURITY SNAPSHOT

- Concerns about 2015 rice production due to El Niño conditions
- Cereal imports in 2014/15 marketing year (July/June) to increase from last year's record level
- Prices of rice continue to weaken in May

Concerns about 2015 rice production due to El Niño conditions

Planting of the 2015 main season rice crop, accounting for about 55 percent of annual production, is currently underway and will conclude in mid-July. Remote sensing data indicates lower-than-average rainfall since the first dekad of April over the main rice-producing areas, which may delay planting operations and reduce sowings. The high probability of an El Niño event this year is also causing concerns about production, as the phenomenon is often associated with below-average precipitation which may result in reduced yields of the ongoing 2015 main season cereal crops and/or affect planting and yields of the 2015/16 secondary irrigated crops. By early March, reports from the main meteorological and oceanic institutions declared the onset of a weak to moderate El Niño event. However, considerable uncertainty persists about the intensity and duration of the event. Pending more developments of the El Niño event and taking into account the Government's support to the rice sector (expansion of irrigated area, improved seeds and higher fertilizers), FAO initially and preliminarily forecasts the 2015 aggregate rice production at 19.8 million tonnes, 4 percent up from 2014's good level.

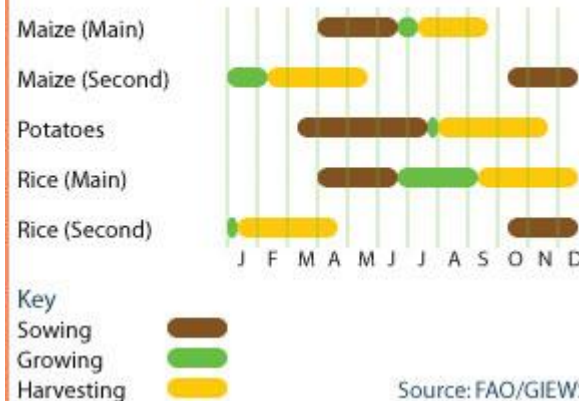
Similarly to rice, planting of the 2015 main season maize crop is currently underway with generally below-average rains. Prospects for the 2015 maize crop are uncertain due to El Niño conditions. FAO preliminarily forecasts the 2015 aggregate maize production at 7.5 million tonnes, 3 percent below last year's record level, as yields are expected to return to average from last year's record level.

Cereal imports in 2014/15 marketing year forecast to increase from last year's record level

Cereal imports in the 2014/15 marketing year (July/June) are forecast at 5.3 million tonnes, 6 percent above last year's record level and 25 percent above the previous five-year average. The increase is attributed to higher wheat imports, which are projected to increase by some 15 percent above last year's low level and reach 3.1 million tonnes, as a result of increased demand from the food and feed industry. Maize imports are expected to decrease by 17 percent to 500 000 tonnes, due to larger domestic availabilities from the good production in 2014. Rice imports in 2015 are forecast to remain similar to last year's above-average level of 1.8 million tonnes. The high level of rice imports reflects the Government's efforts to prevent an increase in domestic prices and restore public stocks.

Prices of rice continued to weaken in May and

Crop calendar Philippines



Philippines

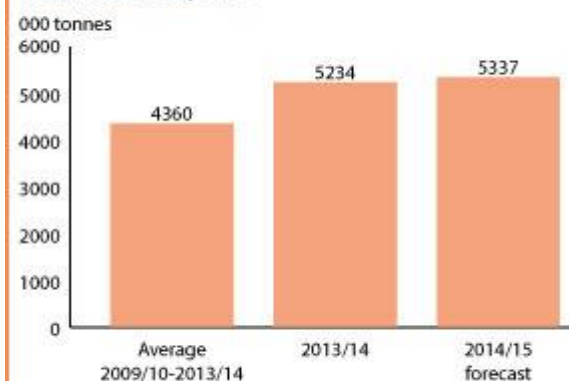
Cereal production

	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes		percent	
Rice (paddy)	17 938	19 005	19 760	4
Maize	7 173	7 771	7 500	-3
Others	0	0	0	0
Total	25 111	26 776	27 260	2

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

Philippines

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

were below their year-earlier levels

The national average prices of regular and well-milled varieties weakened further in May, as a result of ample supplies from the 2014 bumper output.



Reference Date: 30-January-2015

FOOD SECURITY SNAPSHOT

- 2014 aggregate rice and maize harvests set at record level
- Cereal imports in 2014/15 marketing year (July/June) forecast to increase from last year's record level
- In January prices of rice continued their decrease from record highs of previous months

2014 aggregate rice and maize harvest set at record level

Harvesting of the 2014 secondary rice season, accounting for about 45 percent of annual production, is currently underway and will conclude in mid-April. The Bureau of Agricultural Statistics forecasts this season's rice output at a record level of 8.6 million tonnes, up 2 percent from the corresponding season of last year. Sufficient irrigation water supply, expansion of irrigated areas, improved seeds and higher fertilizer use has resulted in higher yield forecasts this season which compensate for the lack of growth in the area sown. Including the revised official estimates of the main season harvest, completed in December 2014, FAO forecasts the 2014 aggregate rice production at a record level of 19.1 million tonnes, up 2 percent year-on-year and 523 000 tonnes more than previously projected.

The 2014 maize production, including the main and secondary seasons, is officially estimated at a record level of 7.8 million tonnes, 6 percent above last year's reduced level. The increase is the result of a 2 percent expansion in plantings, as well as higher yields, following favourable weather during the cropping season and use of improved seeds.

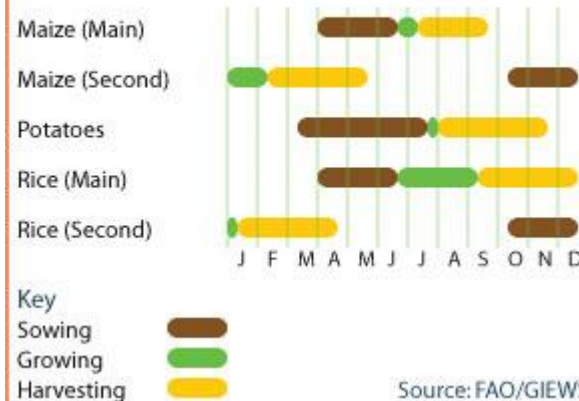
Cereal imports in 2014/15 marketing year forecast to increase from last year's record level

Cereal imports for the 2014/15 marketing year (July/June) are forecast at 5.4 million tonnes, 6 percent above last year's record level and 25 percent above the previous five-year average. The increase is attributed to higher wheat imports, which are projected to increase by some 15 percent above last year's low level and reach 3.1 million tonnes, as a result of increased demand from the food and feed industry. Maize imports are expected to decrease by 17 percent to 500 000 tonnes, due to larger domestic availabilities from the good production in 2014. For rice, imports in 2015 are forecast to remain similar to last year's above-average level of 1.8 million tonnes. The high level of rice imports reflects the Government's efforts to stabilize domestic prices and restore public stocks.

In January prices of rice continued their decrease from record highs of previous months

The national average prices of regular and well-milled varieties weakened further in January, as a result of record supplies from the 2014 main harvest, completed in December and the beginning of the 2014/15 secondary season crop. However, prices remain above year-earlier levels, after steady increases since November 2013 on account of lower stocks. The National Food Authority, the country's grains

Crop calendar Philippines



Philippines

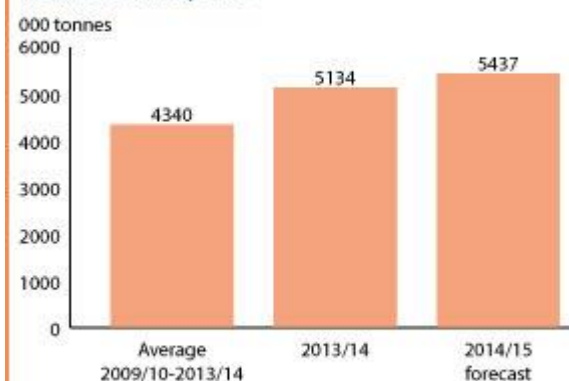
Cereal production

	2009-2013 average	2013	2014 estimate	change 2014/2013
	000 tonnes		percent	
Rice (paddy)	17 239	18 822	19 137	2
Maize	7 025	7 337	7 771	6
Others	0	0	0	0
Total	24 265	26 159	26 908	3

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

Philippines

Total cereal imports



procurement agency, may import an additional 500 000 tonnes of rice in the next months to boost stocks and ensure price stability particularly during the lean season from June to August 2015.



Reference Date: 10-October-2014

FOOD SECURITY SNAPSHOT

- The 2014 main season harvest forecast slightly below last year's record level
- Cereal imports in the 2014/15 marketing year (July/June) forecast to decrease from last year's record level
- Prices of rice stable in September but at record levels
- Food insecurity concerns remain due to high prices and for the population affected by several typhoons/cyclones

The 2014 main season harvest forecast slightly below last year's record level

Harvesting of the 2014, mostly irrigated, main season paddy crop, accounting for about 55 percent of the annual production, is currently underway and will continue until mid-December. Latest official forecasts put this season's rice output at 10.7 million tonnes, slightly below the corresponding season of last year. The small decrease in production is attributed to a 2 percent contraction in planted area, mainly as a result of lower-than-normal precipitations between April and mid-May, which hindered somewhat sowing activities. Assuming an average secondary season harvest, to be planted from mid-October onwards, FAO tentatively forecasts the 2014 aggregate rice production at 18.6 million tonnes, marginally below last year's record level.

Harvesting of the 2014 main season maize was completed by mid-September. FAO forecasts the 2014 maize production, including the 2014 main and the forthcoming secondary seasons, at 7.6 million tonnes, up 4 percent from last year's bumper level.

Cereal imports in the 2014/15 marketing year forecast to decrease from last year's record level

Cereal imports for the 2014/15 marketing year are forecast at 5.5 million tonnes, 5 percent down from last year's record level and 23 percent above the previous five-year average. Imports of wheat (which is not produced domestically) are projected to decrease slightly from last year's high level and reach 3.4 million tonnes in the 2014/15 marketing year (July/June). Rice imports in 2014 are expected to more than double the level of the previous year and reach 1.8 million tonnes, reflecting Government efforts to stabilize domestic prices and restore public stocks. In 2015, rice imports are forecast to decrease by 6 percent compared to the level of 2014 and reach 1.7 million tonnes.

Prices of rice stable in September but at record levels

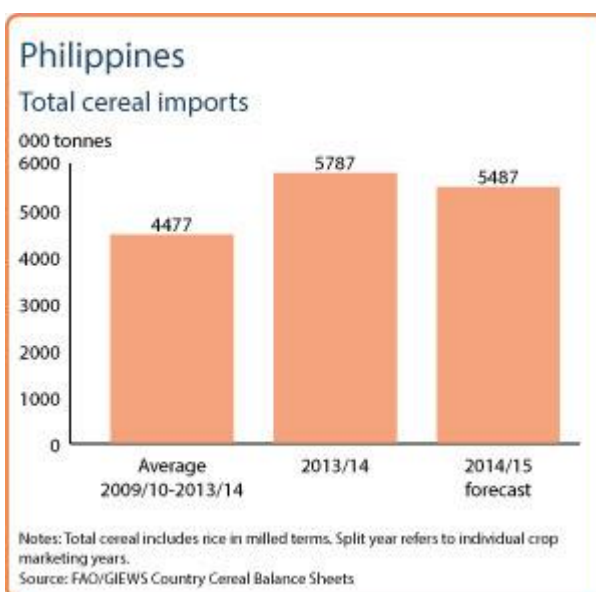
The national average prices of regular and well-milled varieties were stable in September, mainly reflecting the onset of the 2014 main season harvest. However, prices remain at record levels after steady increases since November 2013 on account of lower stocks, following reduced imports in the previous months. In an attempt to stabilize prices, the National Food Authority (NFA) is currently importing 500 000 tonnes of broken rice, to be delivered between 15 October and 15 December, through a Government-to-Government (G2G) deal from Thailand and Viet Nam. The latest available official data indicates a



Philippines Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes		percent	
Rice (paddy)	17 239	18 822	18 614	-1
Maize	7 025	7 337	7 605	4
Others	0	0	0	0
Total	24 265	26 159	26 219	0

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



4.7 percent year-on-year increase in the Consumer Price Index (CPI) in September 2014.

Food insecurity concerns remain due to high prices and for the population affected by several typhoons/cyclones

Overall, food security in the country is considered satisfactory following consecutive years of good harvests. However, severe typhoons/cyclones hit the country regularly, causing widespread devastation, loss of life and severe damage to the agricultural sector. The high prices of main staple rice are also a contributing factor for food insecurity, especially of the low-income households.



Reference Date: 08-August-2014

FOOD SECURITY SNAPSHOT

- Despite localized crop damage due to Typhoon Glenda, prospects for the 2014 main season rice production remained favourable
- Record cereal imports in the 2013/14 marketing year (July/June)
- Prices of rice continued to increase in July reaching record levels
- Food insecurity concerns remain due to high prices and for the population affected by several typhoons/cyclones

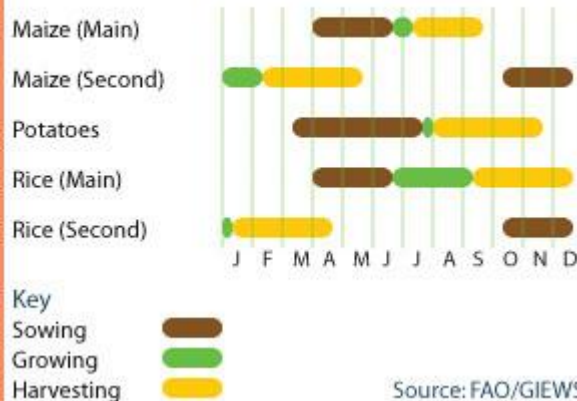
Despite localized crop damage due to Typhoon Glenda, prospects for the 2014 main season rice remained favourable

Planting of the 2014, mostly irrigated, main season paddy crop, accounting for about 55 percent of the annual production, was completed by mid-June. After lower-than-normal precipitation between April and mid-May, remote sensing data indicate average to above-average rains since late May over most parts of the country, benefiting late transplanting activities and the earlier planted crops. In mid-July, Typhoon Glenda (*Rammason*) brought heavy rains and strong winds across southern areas of Luzon and central parts of the country, causing localized damages to rice and maize crops. A detailed assessment of the agricultural losses is still not available, but according to National Disaster Risk Reduction and Management Council (NDRRMC), cereals in the Region III (Central Luzon), IV-A (Calabarzon) and IV-B (Mimaropa) were affected the most. However, the overall damage to the 2014 main season cereal crops is expected to be limited. As a result, FAO forecasts this season's rice output at 10.7 million tonnes, 3 percent above the corresponding season of the last year. The projected increase is mainly due to a 2 percent expansion in planted area, in response to high prices and Government support to the rice sector. Assuming an average secondary season harvest, to be planted from mid-October onwards, FAO tentatively forecasts the 2014 aggregate rice production at 19 million tonnes, close to last year's record level.

Harvesting of the 2014 main season maize crop is currently underway and will be completed by mid-September. FAO forecasts the 2014 maize production, including the ongoing main and the forthcoming secondary seasons, at 7.4 million tonnes, around last year's bumper level.

The probability (50 to 65 percent) of an El Niño phenomenon developing this year causes concern about cereal production, as the past events resulted in production declines in the country. Although El Niño conditions are still neutral, and a weak event appears more likely, forecasts released by the Philippine Atmospheric, Geophysical and Astronomical Services Administration (PAGASA), indicate below-average rains in the last quarter of the year (October-December), particularly over Luzon and Visayas, two main producing areas. Depending on the timing of an eventual El Niño, yields of the 2014 main season cereals crops and/or planting of the 2015 secondary paddy

Crop calendar Philippines



Philippines

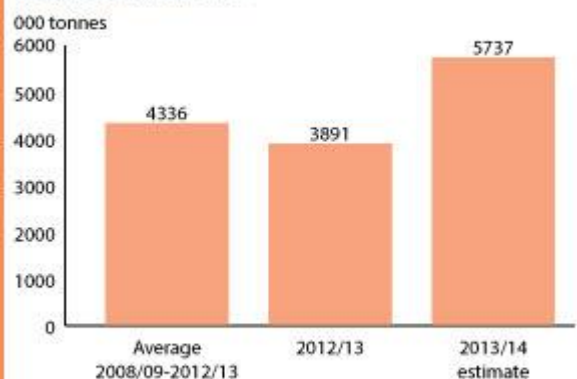
Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes			percent
Rice (paddy)	17,225	18,751	19,000	1
Maize	7,032	7,371	7,400	0
Others	0	0	0	0
Total	24,257	26,122	26,400	1

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

Philippines

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

crops may be negatively affected by the event.

Record cereal imports in the 2013/14 marketing year

Cereal imports for the 2013/14 marketing year are estimated at 5.7 million tonnes, almost 50 percent above last year's low level. Rice imports in the 2014 marketing year are expected to more than double the level of the previous year and reach 1.8 million tonnes, reflecting Government efforts to stabilize domestic prices and restore public stocks. Similarly, imports of wheat (which is not produced domestically) increased to 3.4 million tonnes in the 2013/14 marketing year (July/June), due to strong domestic demand. Reportedly, the Government recently decided to lower the tariff under the Minimum Access Volumes (MAV) from 40 percent to 35 percent and increased the MAV to 805 200 tonnes, up from the current 350 000 tonnes. The tariff for imported volumes beyond the MAV level will remain at 50 percent.

Prices of rice continued to increase in July reaching record levels

The national average prices of regular and well-milled varieties strengthened further in July reaching record levels, mainly as a result of lower imports in previous months, coupled with concerns about localized crop losses, following Typhoon Glenda. In an attempt to stabilize prices and rebuild stocks, the National Food Authority (NFA) is currently importing 800 000 tonnes of rice from Viet Nam and has recently announced plans of additional 200 000 tonnes before the end of September and further 500 000 tonnes in the coming months.

The latest available official data indicates a 4.9 percent year-on-year increase in the Consumer Price Index (CPI) in July 2014.

Food insecurity concerns remain due to high prices and for the population affected by several typhoons/cyclones

Overall, food security in the country is considered satisfactory following consecutive years of good harvests. However, severe typhoon/cyclones hit the country regularly, causing widespread devastation, loss of life and severe damage to the agricultural sector. The NDRRMC estimates that typhoons Haiyan (in early November 2013) and Glenda affected at least 16 and 4 million people, respectively. The storms also caused severe damages to housing and infrastructure, including irrigation and storage facilities. In addition, losses to stored crops at household level and in warehouses were also reported.

The high prices of main staple rice are also a contributing factor for food insecurity, especially of the low-income households.



Reference Date: 07-May-2014

FOOD SECURITY SNAPSHOT

- The 2013/14 secondary season paddy harvest estimated at a record level
- Cereal imports forecast to increase in 2014 marketing year (July/June)
- Prices of rice in April continued to increase reaching record levels
- Food insecurity concerns remain for the population affected by the Typhoon *Haiyan*

Despite successive typhoons, the 2013 aggregate rice production estimated at record levels

Harvesting of the 2013/14, mostly irrigated, secondary season paddy crop, which accounts for about 45 percent of the annual production, was completed by mid-April. Despite localized damage to rice crops at the start of the season following the passing of Typhoon *Haiyan* in early November in central parts of the country, this season's rice output is officially estimated at a record level of 8.4 million tonnes, about 5 percent higher than in the same season last year. The production gains are mainly attributed to a 4 percent expansion in the area planted, as farmers replanted fields damaged by Typhoon *Haiyan*, and record yields were obtained following good rainfall during the growing season. Furthermore, ample supplies of irrigation water, seeds, fertilizers and other inputs contributed to this season's bumper harvest. Similarly, the latest official estimates put the 2013 main season rice crop, harvested by mid-December 2013, at a record level of 10.4 million tonnes, some 3 percent above the corresponding season of the previous year. The increase largely reflects record yields as a result of abundant rainfall and Government production incentives. A slight expansion in the area planted, particularly in the Autonomous Region in Muslim Mindanao (ARMM), Caraga and Central Luzon, more than offset the damages caused by successive typhoons, including *Nari* in mid-October in the northern parts of the country and *Haiyan*. In aggregate, the 2013 rice production (2013 main and 2013/14 second seasons) is estimated at a record level of 18.9 million tonnes, 4 percent up on previous year's bumper crop.

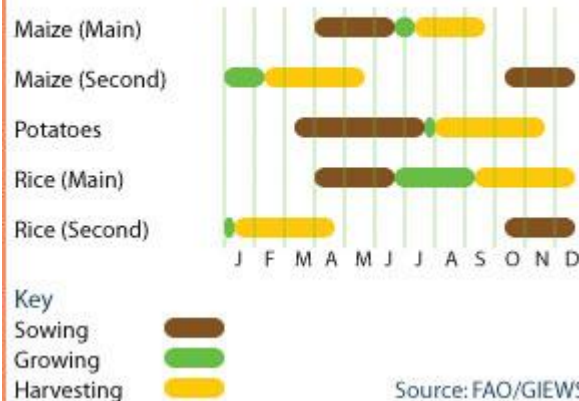
The 2013 maize production, including the main and secondary seasons, is officially estimated at 7.4 million tonnes, similar to last year's record level. Damage to the 2013 maize crop due to the adverse weather was limited as the harvest was virtually completed by mid-September.

Planting of the 2014 main season crops, including rice and maize, started in early April and will continue until mid-June. Assuming a good monsoon season and continued Government support to the rice sector, FAO tentatively forecasts the aggregate 2014 rice production at 19.3 million tonnes, slightly above the record level of 2013.

Cereal imports forecast to increase in 2013/14 marketing year (July/June)

In aggregate, the country's cereal imports for the 2013/14 marketing

Crop calendar Philippines



Philippines

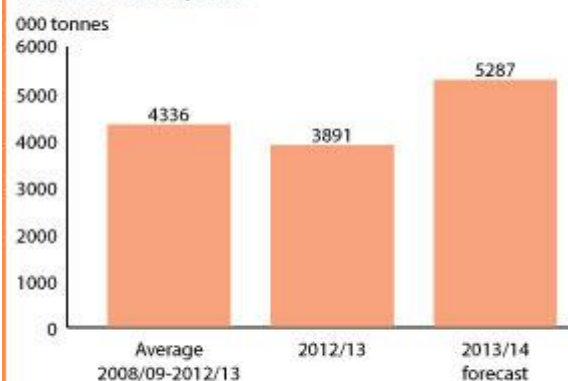
Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes		percent	
Rice (paddy)	17 250	18 875	19 300	2
Maize	7 032	7 371	7 400	0
Others	0	0	0	0
Total	24 282	26 246	26 700	2

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

Philippines

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

year (July/June) are forecast at 5.3 million tonnes, some 36 percent above last year's low level. The projected increase is mainly attributed to higher rice imports, which are expected to double the level of 2013 and reach 1.4 million tonnes, reflecting Government efforts to restore public stocks and stabilize domestic prices. Similarly, imports of wheat (which is not produced domestically) are forecast to increase to 3.5 million tonnes in 2013/14 marketing year (July/June), due to strong domestic demand. The overall increase in cereal imports is also supported by expanding population.

Prices of rice continued to increase in April reaching record levels

The national average prices of regular and well-milled varieties increased marginally in April, reaching record levels, despite the recent completion of the 2013/14 secondary season harvest, estimated at a record level. Prices were mainly underpinned by low levels of stocks, reduced cross-border imports as well as higher oil and electricity prices. In an attempt to stabilize prices, the Government announced the import of around 800 000 tonnes of rice between May and August 2014. In April 2014, prices of regular milled and well-milled rice were about 20 and 18 percent higher, respectively than in same month a year earlier.

The latest available official data indicates a 4.1 percent year-on-year increase in the Consumer Price Index (CPI) in April 2014.

Food insecurity concerns remain for the population affected by the Typhoon Haiyan

Overall, food security in the country is considered satisfactory except in areas affected by several typhoons/storms last year. The National Disaster Risk Reduction and Management Council estimates that a total of 16 million people were affected by the Typhoon *Haiyan*. The storm also caused severe damages to housing and infrastructure, including irrigation and storage facilities. According to the Food Security and Agriculture Cluster estimates, as of 11 March, a total of 5.6 million people remain in need of food assistance in typhoon-affected areas.



Reference Date: 28-January-2014

FOOD SECURITY SNAPSHOT

- Strong typhoons dampened earlier expectations for an increase in rice production in 2013
- Cereal imports in 2014 forecast to increase
- Prices of rice in January increased to near record levels
- Food insecurity concerns rise for the affected population due to the adverse impact of Typhoon *Haiyan*

Strong typhoons dampen earlier expectations for an increase in rice production in 2013

On 8 November 2013, the Philippines was struck by Typhoon *Haiyan* of Category 5, affecting nine Regions across the central parts of the country and causing widespread devastation, massive loss of life and severe damages to agriculture and fisheries sector. At the time of the Typhoon harvesting of the 2013 main season paddy crop, representing 55 percent of annual production, was well advanced, while planting of the mostly irrigated 2013/14 second season crop had started.

According to the National Disaster Risk Reduction and Management Council (NDRRMC), the bulk of the reduction in paddy and maize production for the two seasons is forecast to come from the five affected central Regions of the country, Region VIII (Eastern Visayas), VI (Western Visayas), IV-B (Mimaropa), V (Bicol), and VII (Central Visayas). These regions all together account for 35 percent of the total national paddy area harvested and 32 percent of production. The official estimates from NDRRMC indicate that close to 86 000 hectares of rice were affected due to *Haiyan*. This follows the damage to 248 000 hectares of paddy caused by category 1 Typhoon *Nari* (*Santi*) on 12 October in the northern parts of the country.

As a result, FAO has lowered its 2013 paddy production forecast for the Philippines to take into account losses to the main season crop due to both Typhoon *Nari* in northern parts and recent Typhoon *Haiyan*, as well as anticipated reduction in the area planted to the ongoing secondary season.

The 2013 aggregate paddy production (main 2013 season and 2013/14 secondary season) is expected at 18 million tonnes, down from expectations of a bumper crop of 18.9 million tonnes at the beginning of the season. The good harvest was expected given the higher plantings and yields in response to Government production incentives and favourable weather in the first part of the season. At the projected level, the 2013 paddy output will be slightly lower than that of 2012.

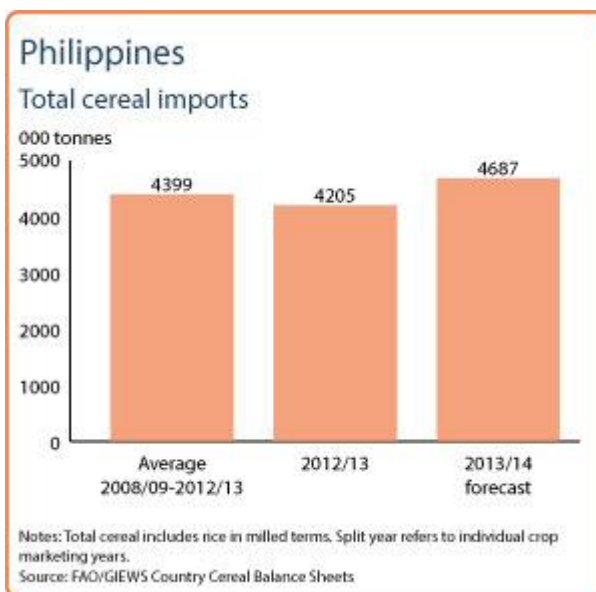
Damage to the 2013 main season maize crop has been limited as the harvest was virtually completed by mid-September. According to preliminary official estimates, a total of at least 20 951 hectares of maize crop has been affected. Not counting the full damage, the output of the crop is officially estimated at about 4 million tonnes, some 3 percent above last year's bumper harvest of the same season. Including the poor harvest of the previous secondary season in May, the aggregate 2013 maize output is preliminarily estimated at 7.4 million tonnes, slightly below last year's record level.



Philippines Cereal production

	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes		percent	
Rice (paddy)	16,889	18,138	18,000	-1
Maize	6,943	7,407	7,371	0
Others	0	0	0	0
Total	23,832	25,545	25,371	-1

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



Rice imports forecast to increase in 2014

The Philippines is a rice importer and in the last five years quantities have ranged from 2.4 million tonnes in 2008 to 1 million tonnes in 2013. Given the tentative reduced forecast for the 2013 rice production, imports in 2014 are expected to rise by 20 percent to 1.2 million tonnes. Wheat is not produced domestically hence the country imports all of its consumption requirements, forecast at 3.35 million tonnes in 2014. In aggregate, the country's total cereal import requirement for the 2013/14 marketing year is anticipated at 4.7 million tonnes, some 11 percent above last year's level. The overall increase in cereal imports is also supported by expanding population.

Prices of rice in January increased marginally to record levels

Despite the 2013 main season paddy harvest, the national average retail price of regular and well-milled varieties, increased marginally in January, reaching new record level. Prices were mainly supported by higher electricity and oil prices as well the slight decrease in production, following Typhoon *Nari* and *Haiyan*.

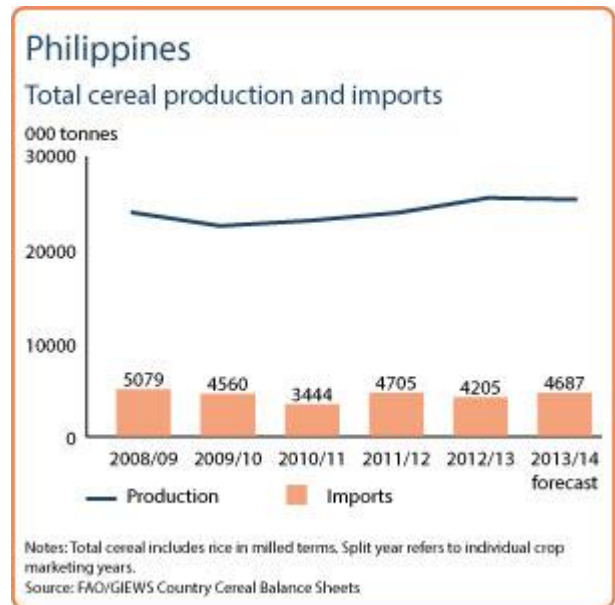
In December 2013, prices of regular milled and well-milled rice were about 14 and 12 percent higher than in same month a year earlier.

The latest available official data indicates a 4.1 percent year-on-year increase in the Consumer Price Index (CPI) in December 2013.

Food insecurity concerns rise for the affected population due to the adverse impact of Typhoon *Haiyan*

Overall, food security in the country is considered satisfactory except in areas affected by several typhoons/storms last year. According to the WFP estimates, as of 16 December, a total of 16.1 million people have been affected. The storm also caused severe damages to housing and infrastructure, including irrigation and storage facilities. Thus, losses to the stored crop at household level and in warehouses are likely to be high.

In the affected areas heavy losses of staple food crop rice, other high value crops such as, sugarcane, coconut, fruits and vegetables, as well as of livestock, poultry and fisheries are expected. High winds, heavy rains and localized floods also resulted in losses of stored paddy production and seeds. The overall damage has severely compromised livelihoods of the affected households.



Reference Date: 19-November-2013

FOOD SECURITY SNAPSHOT

- Strong typhoons dampen earlier expectations for an increase in rice production this year
- Cereal imports in 2014 forecast to increase
- Prices of rice in October remained at near record levels
- Food insecurity concerns rise for the affected population due to the adverse impact of Typhoon *Haiyan*

Strong typhoons dampen earlier expectations for an increase in rice production

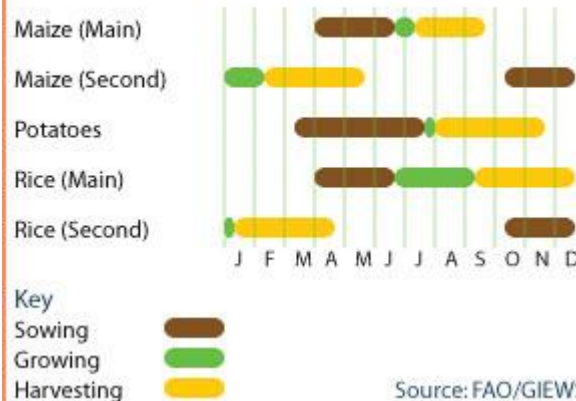
Typhoon *Haiyan* of Category 5 hit the Philippines on 8 November, affecting nine Regions across the central parts of the country and causing widespread devastation, massive loss of life and severe damages to agriculture and fisheries sector. At the time of the Typhoon harvesting of the 2013 main season paddy crop, representing 55 percent of annual production, was well advanced, while planting of the mostly irrigated 2013/14 second season crop had started.

According to the National Disaster Risk Reduction and Management Council (NDRRMC), the bulk of the reduction in paddy and maize production for the two seasons is forecast to come from the five affected central Regions of the country, Region VIII (Eastern Visayas), VI (Western Visayas), IV-B (Mimaropa), V (Bicol), and VII (Central Visayas). These regions all together account for 35 percent of the total national paddy area harvested and 32 percent of production. Although no detailed reports of exact crop damage are yet available, the provisional official estimates from NDRRMC indicate that at least 77 476 hectares of rice are affected due to *Haiyan*. This follows the damage to 248 000 hectares of paddy caused by category 1 Typhoon *Nari (Santi)* on 12 October in the northern parts of the country.

Pending a more detailed assessment, FAO has lowered its 2013 paddy production forecast for the Philippines to take into account losses to the main season crop due to both Typhoon *Nari* in northern parts and recent Typhoon *Haiyan*, as well as anticipated reduction in the area planted to the secondary season to be harvested from January next year. The 2013 aggregate paddy production (main 2013 season and 2013/14 secondary season) is now expected at 18 million tonnes, down from expectations of a bumper crop of 18.9 million tonnes at the beginning of the season. The good harvest was expected given the higher plantings and yields in response to Government production incentives and favourable weather in the first part of the season. At the projected level, the 2013 paddy output will be slightly lower than that of 2012. However, the final outcome will depend on timely rehabilitation activities and provision of seed and fertilizer for planting/replanting by mid-December/early January, before the end of the sowing period.

Damage to the 2013 main season maize crop has been limited as the harvest was virtually completed by mid-September. According to preliminary official estimates, a total of at least 20 951 hectares of maize crop has been affected. Not counting the full damage, the output of the crop is officially estimated at about 4 million tonnes, some 3 percent above last year's bumper harvest of the same season.

Crop calendar Philippines



Philippines

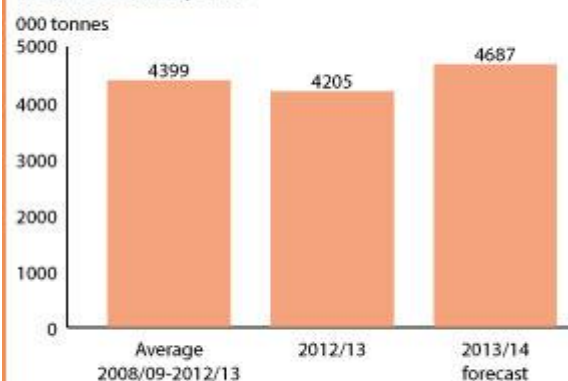
Cereal production

	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes		percent	
Rice (paddy)	16,889	18,138	18,000	-1
Maize	6,943	7,407	7,371	0
Others	0	0	0	0
Total	23,832	25,545	25,371	-1

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

Philippines

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

Including the poor harvest of the previous secondary season in May, the aggregate 2013 maize output is preliminarily estimated at 7.4 million tonnes, slightly below last year's record level.

Official estimates also indicate that some 45 068 hectares of high value crops have also been affected.

Rice imports forecast to increase in 2014

The Philippines is a rice importer and in the last five years quantities have ranged from 2.4 million tonnes in 2008 to 1 million tonnes in 2013. Given the tentative reduced forecast for the 2013 rice production, imports in 2014 are expected to rise by 20 percent to 1.2 million tonnes. Wheat is not produced domestically hence the country imports all of its consumption requirements, forecast at 3.35 million tonnes in 2014. In aggregate, the country's total cereal import requirement for the 2013/14 marketing year is anticipated at 4.7 million tonnes, some 11 percent above last year's level. The overall increase in cereal imports is also supported by expanding population.

Prices of rice in October decreased marginally but remain at near record levels

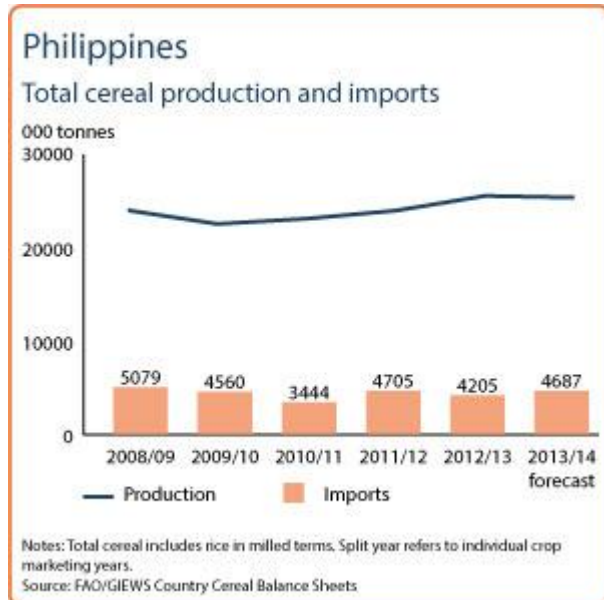
Besides the disruption to local markets in affected areas, the impact of Typhoon *Haiyan* on prices is not yet known. The national average retail price of regular and well-milled varieties, decreased only marginally in October with the progress of the 2013 main season paddy crop, after increasing markedly in recent months and reaching record levels in September. The downward pressure from the harvest was, however, offset by concerns about localized crop damages, following Typhoon *Nari* in mid-October, which affected northern parts of the country. In October 2013, prices of regular milled and well-milled rice were about 11 and 10 percent higher than in same month a year earlier.

The general inflation rate in the country is relatively low. The latest available official data indicates a 2.9 percent year-on-year increase in the Consumer Price Index (CPI) in October 2013.

Food insecurity concerns rise for the affected population due to the adverse impact of Typhoon *Haiyan*

Overall, food security in the country is considered satisfactory except in areas affected by several typhoons/storms since late August. According to the UN/OCHA estimates, as of 18 November, a total of 13 million people have been affected and over 4 million displaced due to the latest Typhoon. The storm also caused severe damages to housing and infrastructure, including irrigation and storage facilities. Thus, losses to the stored crop at household level and in warehouses are likely to be high.

In the affected areas heavy losses of staple food crop rice, other high value crops such as, sugarcane, coconut, fruits and vegetables, as well as of livestock, poultry and fisheries are expected. High winds, heavy rains and localized floods also resulted in losses of stored paddy production and seeds. The overall damage has severely compromised livelihoods of the affected households.



Reference Date: 14-January-2013

FOOD SECURITY SNAPSHOT

- Typhoon Bopha causes some localized crop damage in southern Philippines
- The 2012 main season paddy and maize harvests officially estimated at record levels
- Cereal imports in 2012/13 marketing year to decline
- Prices of rice and maize have remained relatively stable
- Food insecurity persists in some areas of the country

Typhoon Bopha causes some localized crop damage in southern Philippines

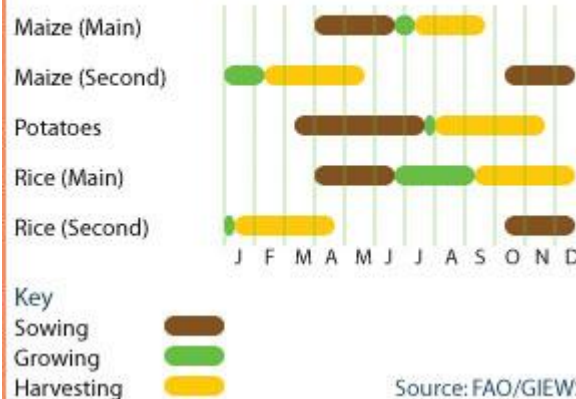
Planting of the 2012/13 secondary season crops, rice and maize, was undertaken from October to December. The start of the season has been characterised by below average rains over much of the country, particularly in interior parts of Regions II, VI and XII. In early December, typhoon Bopha brought heavy rains and wind across the island of Mindanao in southern Philippines causing localised flash flooding and landslides. The reports indicate damages of about 28 000 hectares of rice and 35 000 hectares of maize, mostly in Northern Mindanao and Davao regions. However, the impact on the total national production is expected to be minimal. Early indications for the 2012/13 secondary crop point to an increase in plantings to maize and paddy.

The 2012 main season paddy and maize harvests officially estimated at record levels

Harvesting of the 2012 main season paddy crop was completed by mid-December. The Bureau of Agricultural Statistics (BAS) has estimated the 2012 main season paddy crop at a record level of 10.1 million tonnes, some 10.7 percent above the previous year's another record harvest from the corresponding season. Aggregate rice production for 2012, including the main and the ongoing secondary seasons, is estimated at 18 million tonnes (equivalent to 11.8 million tonnes in milled terms), some 6 percent above the 2011 harvest.

The increase mainly reflects, an expansion in the planted area and higher yields following favourable weather as a result of the La Nina Phenomenon during the main season. The biggest increase in production is estimated to come from Cagayan Valley, Central Luzon, Ilocos Region and Western Visayas. Part of the estimated expansion would also be attributed to the introduction of a third cropping cycle between 2011/12 secondary and the 2012 main seasons, as a result of government's initiative to reduce the risk of seasonal typhoons which generally occur in October-November. The 2012 main season maize crop, harvested by mid-September 2012, is officially estimated at 3.9 million tonnes, some 7.8 percent above last year's harvest of the same season. Including the estimated output of the secondary season, harvested in May 2012, the 2012 total maize production is set at 7.4 million tonnes, about 6 percent up on 2011. Significant gains in production are expected from Cagayan Valley and Western Visayas, following an expansion in planted area and favourable weather conditions, as well as shifting from sugarcane in northern Mindanao and from tomato, onion and peanut in Ilocos Sur, La Union and

Crop calendar Philippines



Philippines

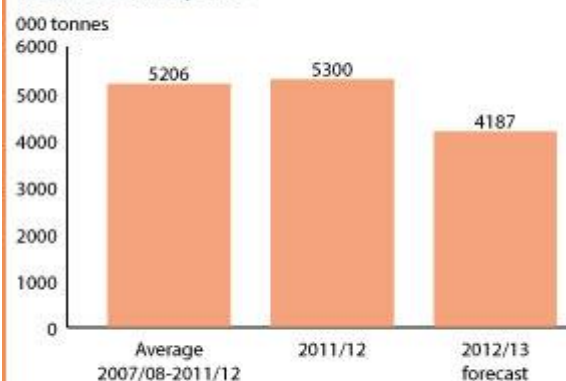
Cereal production

	2007-2011 average	2011	2012 forecast	change 2012/2011
	000 tonnes		percent	
Rice (paddy)	16 588	16 998	18 000	6
Maize	6 809	6 971	7 418	6
Others	0	0	0	0
Total	23 397	23 969	25 418	6

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

Philippines

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

Pangasinan.

Cereal imports in 2012/13 marketing year to decline

The country's total cereal import requirements for the 2012/13 marketing year (July/June) are forecast at 4.2 million tonnes, some 21 percent below last year's level as a result of anticipated higher cereal production in 2012. Since wheat is not produced, the country will import all of its consumption requirements forecast at 3.2 million tonnes.

Prices of rice and maize have remained relatively stable mainly in response to the adequate supplies

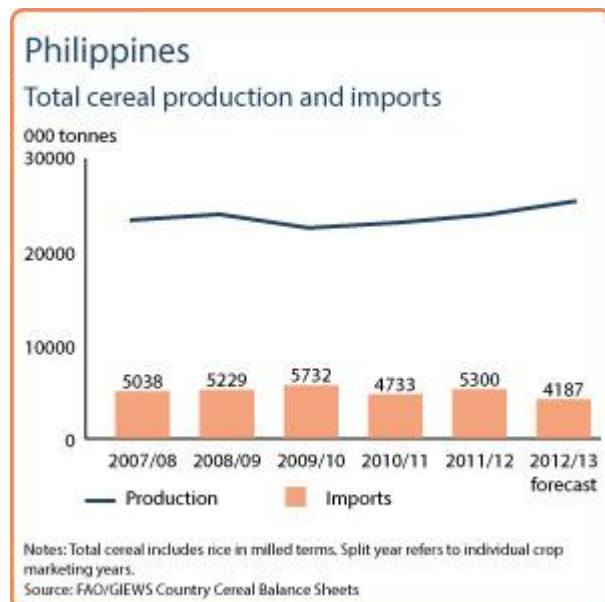
The national average retail price of regular milled rice has remained relatively stable in recent months reflecting in part, adequate supplies from the 2012 main season paddy harvest and the price stabilizing efforts of the National Food Authority through the Rice Procurement Program. Similarly maize prices have remained generally stable since August 2011.

In December 2012, prices of regular milled rice and white maize were 1.6 and 2 percent higher than in December 2011, respectively.

The latest available official data indicate that a year-on-year increase in the Consumer Price Index (CPI) in December 2012 was 2.9 percent.

Food insecurity persists in some areas of the country

Overall, food security in the country is considered satisfactory except in areas affected by several typhoons/storms in July, August and December. In all, over 6.6 million people were adversely affected by the typhoons this year, with the majority located in central Luzon and the island of Mindanao. Damage to infrastructure, roads and housing was also reported.



Reference Date: 7-August-2012

FOOD SECURITY SNAPSHOT

- The 2012 secondary season paddy and maize harvests officially estimated at a record level
- Prices of rice continue to rise, while those of maize have remained relatively stable
- Food insecurity persists in some areas of the country

The 2012 secondary season paddy and maize harvests officially estimated at a record level

Harvesting of the 2012 secondary season paddy crop was completed in April. The Bureau of Agricultural Statistics (BAS) has estimated the 2011 secondary season paddy crop at a record level of 7.84 million tonnes, 3.2 percent above the previous year's bumper harvest from the corresponding season. The increase reflects, an expansion of about 2.4 percent in the planted area and higher yields following favourable weather as a result of the La Nina Phenomenon. The biggest increase in production is estimated to come from Cagayan province, which benefited from adequate irrigation water supply and high-yielding varieties and Central Luzon region.

Despite severe typhoons and localized flooding in September and October 2011, the 2011/12 aggregate paddy output (main and second seasons) is officially estimated to reach 17.5 million tonnes (equivalent to 11.1 million tonnes of milled rice), 1.5 percent up from the bumper harvest a year before and 4.2 percent above the average of the previous five years.

In order to reduce the risk of seasonal typhoons which occur usually in October-November, the government established an initiative to permit harvests to take place as early as possible and reduce crop damage. The programme is expected to start over 190 000 hectares in Central Luzon.

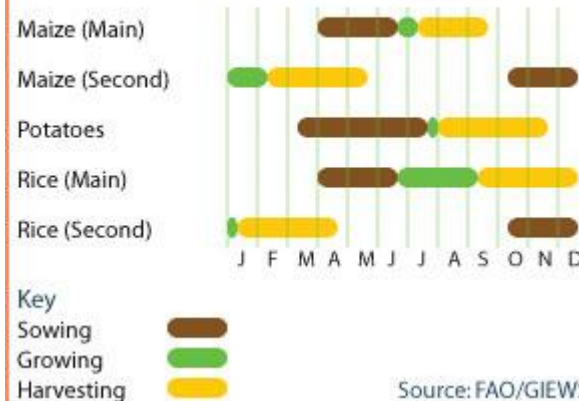
The 2012 main season paddy crop, sown from April onwards, is currently in critical growing stage, under near normal rains.

Assuming average weather conditions during the season and taking into account diverse initiatives launched by the government in order to achieve rice self-sufficiency target by 2013, as well as the anticipated increase in area planted, the aggregate rice production in 2012 is forecast to increase by 3.1 percent to 17.5 million tonnes.

Harvesting of the 2012 secondary season maize crop was completed earlier in the year, while that of the main season is currently underway and will continue into mid-September.

The 2012 secondary season maize production, which accounts for approximately 47 percent of the national annual output, is officially estimated to reach a record level of 3.44 million tonnes or 4 percent above last year's good output of the same season. The increase mainly comes from Ilocos Region, following an expansion in planted area of yellow maize and adequate supply of subsidized high-quality seeds from the Provincial Local Government Unit (PLGU), as well as shifting from tomato, onion and peanut in Ilocos Sur, La Union and Pangasinan.

Crop calendar Philippines



Philippines

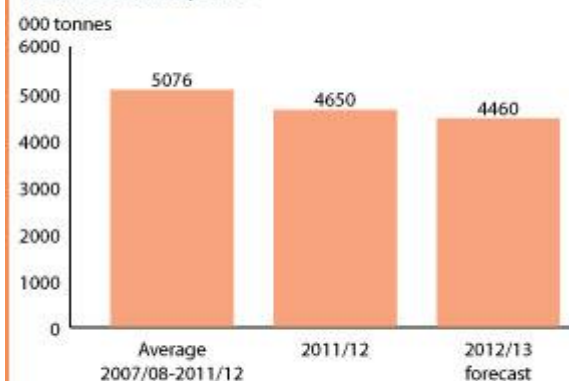
Cereal production

	2007-2011	2011	2012	change
	average		forecast	2012/2011
	000 tonnes		percent	
Rice (paddy)	16 584	16 976	17 500	3
Maize	6 809	6 971	7 280	4
Others	0	0	0	0
Total	23 393	23 947	24 780	3

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

Philippines

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

Based on satellite imagery, near normal rainfall was received from the beginning of April to mid July in most of the regions of the country, which have had a beneficial impact on planting and crop emergence of paddy and maize crops if the main season.

However, typhoon Saola has brought heavy downpours across large parts of the country since the end of July, causing localised flooding, casualties and damage to agriculture, infrastructure and housing.

Cereal imports in 2012/13 marketing year to decline

The country's total cereal import requirements for the new 2012/13 marketing year (July/June) are forecast at 4.5 million tonnes, some 4 percent below last year's level as a result of anticipated higher cereal production in 2012. Since wheat is not produced, the country will import all of its consumption requirements forecast at 3.3 million tonnes.

Prices of rice continue to rise, while those of maize have remained relatively stable

Despite forecast improvement in 2012 harvest, the national average retail price of rice has been increasing since December 2010 at a very slow rate, following higher oil prices. The price remained relatively stable over the last two years, reflecting the price stabilizing efforts of the National Food Authority through the Rice Procurement Program. However, this programme has experienced funding shortages, and this may have impacted prices.

Rice prices declined from its peak in June 2008, but they generally remain much higher than the pre-escalation period of late 2007-early 2008. Similarly maize prices have also climbed steadily but generally have remained stable since August 2011.

In July 2012, prices of regular milled rice and white maize were 2.9 and 2.7 percent higher than in July 2011, respectively.

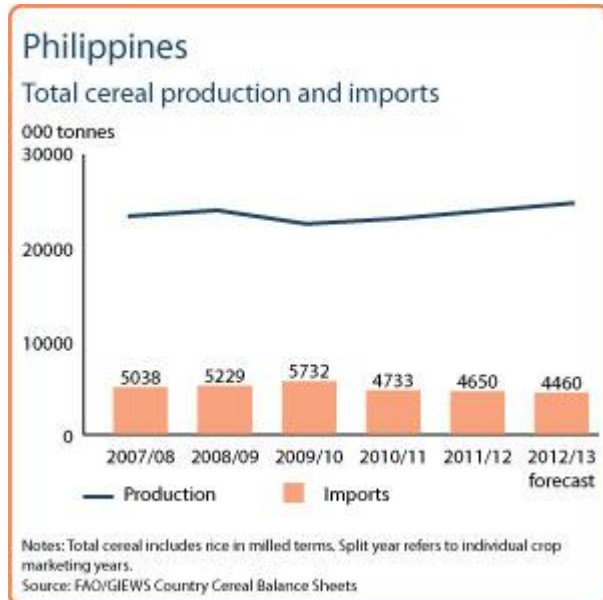
The latest available official data indicate that a year-on-year increase in the Consumer Price Index (CPI) in June 2012 was 2.8 percent.

Food insecurity persists in some areas of the country

Overall, food security in the country is considered satisfactory except in areas affected by the two typhoons in late September/October 2011.

Over 4 million persons have been adversely affected by the typhoons, with the majority located in northern and central Luzon. The number of houses damaged or destroyed has also increased to nearly 72 000.

Food security situation may further deteriorate due to high prices of imported cereals and the decline of remittances from abroad.



Reference Date: 13-February-2012

FOOD SECURITY SNAPSHOT

- Generally favourable rains during the 2011/12 secondary crop season
- Severe typhoons affected paddy rice crop of the 2011 main season
- Prices of rice and maize have remained stable
- Food insecurity concerns rise for the affected population due to the adverse impact of the Nesat and Nalgae typhoons

Generally favourable rains during the 2011/12 secondary crop season

Planting of the 2011/12 secondary crop season was completed by December. Rainfall has been generally satisfactory in most of the regions of the country, which have had beneficial impact on planting and crop emergence.

Severe typhoons affect paddy rice crop of the 2011 main season

The main season for rice and maize starts in July. Following a period of favourable rains during the first phase of the season (June-September), the Philippines was hit by typhoon Nesat on 27 September affecting 35 provinces in northern and central Luzon region and again by typhoon Nalgae on 1 October. This exacerbated the situation on 17 of the 35 provinces in the same region, the most affected being Nueva Ecija, Bulacan, Pampanga and Tarlac.

Both the typhoons and subsequent localized floods have had a severe impact on the current main season paddy crop, which accounts for approximately 55 percent of the national annual output. Preliminary official reports indicate substantial damage to 420 337 hectares with losses estimated at about 728 379 tonnes of paddy or 4.4 percent of the national production.

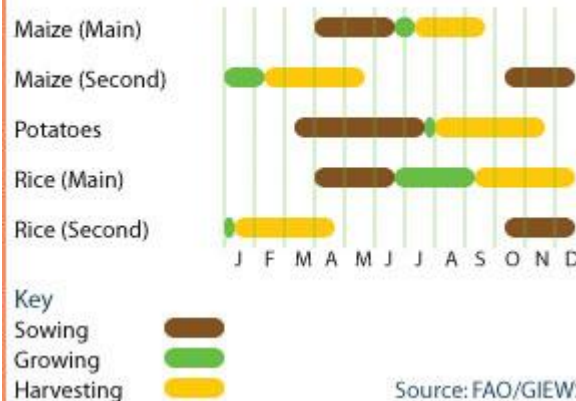
Overall, latest estimates indicate that at least 485 000 hectares of standing crops, including rice, maize and high value commercial crops (HVCC) have been damaged or lost to the floods. The affected cropped area covers 6 percent of the total national cropped area. Additionally, nearly 3.3 million livestock and poultry have been affected by the floods.

FAO estimates the 2011/12 (July/June) aggregate paddy output at 16.4 million tonnes (equivalent to 10.7 million tonnes of milled rice), showing a decrease of about 2 percent from the bumper harvest a year before. Consequently, the country's total cereal import requirements are forecast at 5.4 million tonnes, slightly higher than a year before. Since wheat is not produced in the country, the estimated requirements of some 3 million tonnes are all imported.

Prices of rice and maize have remained stable

National average retail price of rice has remained relatively stable over last two years, reflecting the price stabilizing efforts of the National Food Authority. Prices declined from its peak in June 2008, but they

Crop calendar Philippines



Philippines

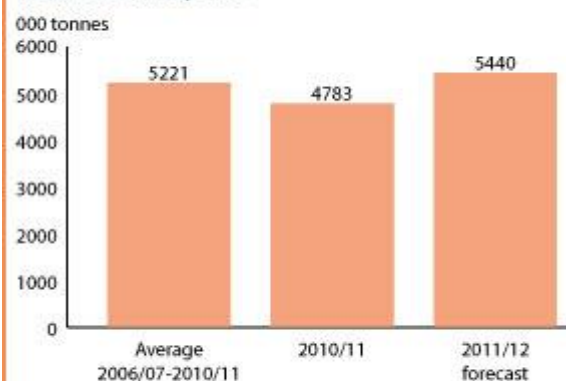
Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes		percent	
Rice (paddy)	16 291	16 728	16 400	-2
Maize	6 632	6 377	7 104	11
Others	0	0	0	0
Total	22 923	23 105	23 504	2

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

Philippines

Total cereal imports

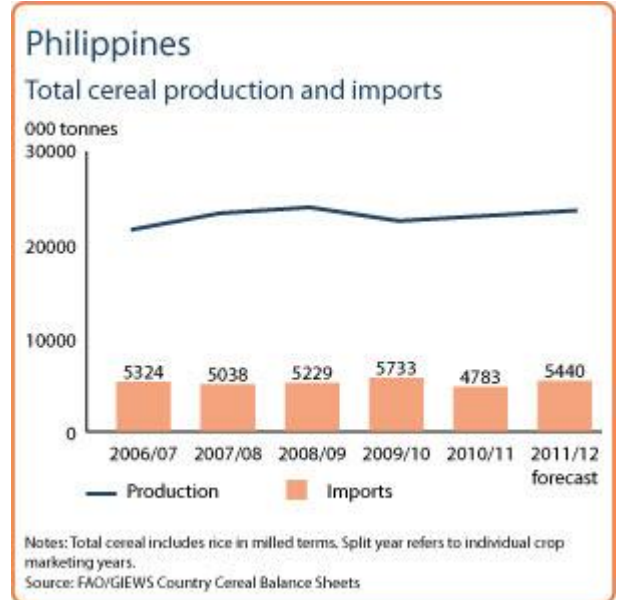


Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
 Source: FAO/GIEWS Country Cereal Balance Sheets

generally remain much higher than the pre-escalation period of late 2007-early 2008. Similarly, maize prices have been relatively stable since August 2011. In December 2011, prices of regular milled rice and white maize were 3 and 7 percent higher than in December 2010, respectively.

Food insecurity concerns rise for the affected population due to the adverse impact of Nesat and Nalgae typhoons

Overall, food security in the country is considered satisfactory except in areas affected by the two typhoons in late September/October. Official estimates, as of 11 October, indicate that over 4 million persons have been adversely affected, with the majority located in northern and central Luzon. The number of houses damaged or destroyed has also increased to nearly 72 000. According to National Disaster Risk Reduction and Management Council (NDRRMC), over 254 400 people are in immediate need of food assistance. However, the extensive damage to infrastructure has limited the accessibility of relief efforts.



Reference Date: 27-October-2011

FOOD SECURITY SNAPSHOT

- Severe typhoons affect paddy rice crop of the 2011 main season
- Prices of rice have remained stable, while that of maize have been rising in last several months
- Food insecurity concerns rise for the affected population due to the adverse impact of the Nesat and Nalgae typhoons

Severe typhoons affect paddy rice crop of the 2011 main season

The main season for rice and maize starts in July. Following a period of favourable rains during the first phase of the season (June-September), the Philippines was hit by typhoon Nesat on 27 September affecting 35 provinces in northern and central Luzon region and again by typhoon Nalgae on 1 October. This exacerbated the situation on 17 of the 35 provinces in the same region, the most affected being Nueva Ecija, Bulacan, Pampanga and Tarlac.

Both the typhoons and subsequent localized floods have had a severe impact on the current main season paddy crop, which accounts for approximately 55 percent of the national annual output. Preliminary official reports indicate substantial damage to 420 337 hectares with losses estimated at about 728 379 tonnes of paddy or 4.4 percent of the national production.

Overall, latest estimates indicate that at least 485 000 hectares of standing crops, including rice, maize and high value commercial crops (HVCC) have been damaged or lost to the floods. The affected cropped area covers 6 percent of the total national cropped area. Additionally, nearly 3.3 million livestock and poultry have been affected by the floods.

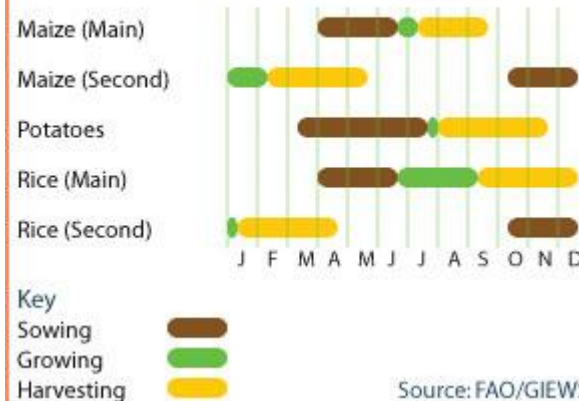
The preliminary FAO forecast for the 2011/12 (July/June) aggregate paddy output has been revised down to 16.4 million tonnes (equivalent to 10.7 million tonnes of milled rice), showing a decrease of about 2 percent from the bumper harvest a year before. Consequently, the country's total cereal import requirements are forecast at 5.4 million tonnes, slightly higher than a year before. Since wheat is not produced in the country, the estimated requirements of some 3 million tonnes are all imported.

Prices of rice have remained stable, while that of maize have been rising in last several months

National average retail price of rice has remained relatively stable over last two years, reflecting the price stabilizing efforts of the National Food Authority. Prices declined from its peak in June 2008, but they generally remain much higher than the pre-escalation period of late 2007-early 2008. By contrast, maize prices which have been stable in June and July, have since increased.

Food insecurity concerns rise for the affected population due to the adverse impact of Nesat and

Crop calendar Philippines



Philippines

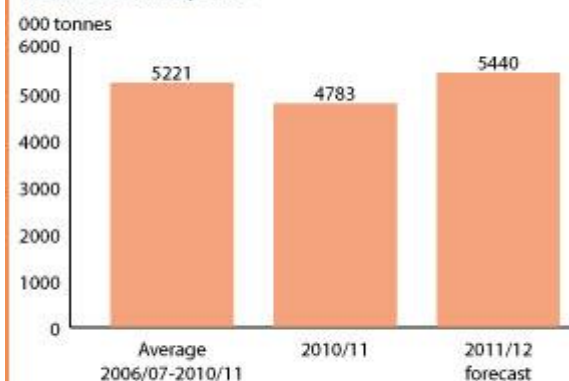
Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes		percent	
Rice (paddy)	16 291	16 728	16 400	-2
Maize	6 632	6 377	7 104	11
Others	0	0	0	0
Total	22 923	23 105	23 504	2

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

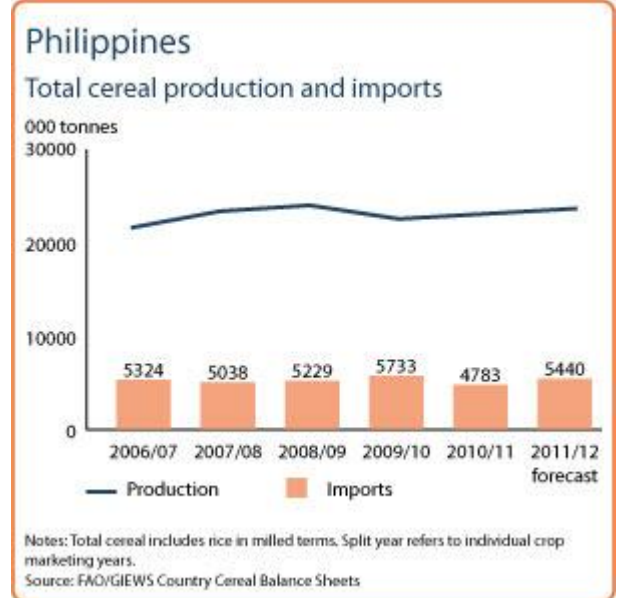
Philippines

Total cereal imports



Nalgae typhoons

Overall, food security in the country is considered satisfactory except in areas affected by the two typhoons in late September/October. Official estimates, as of 11 October, indicate that over 4 million persons have been adversely affected, with the majority located in northern and central Luzon. The number of houses damaged or destroyed has also increased to nearly 72 000. According to National Disaster Risk Reduction and Management Council (NDRRMC), over 254 400 people are in immediate need of food assistance. However, the extensive damage to infrastructure has limited the accessibility of relief efforts.



Reference Date: 23-May-2011

FOOD SECURITY SNAPSHOT

- Bumper harvests of the 2011 secondary season paddy and maize crops are estimated
- Prices of the main staple, rice, remain stable but high
- Food insecurity persists in conflict affected areas of the country

The 2011 secondary season paddy harvest estimated at a record level

Harvesting of the secondary season paddy crops was completed from January to April 2011. A record harvest of 7.6 million tonnes with an increase of about 15 percent over the previous year's poor output is estimated. The secondary season production generally accounts for 40 to 45 percent of the annual total. The second season rice farming has gained importance in recent years due to high prices of the commodity. The main season paddy crop harvested in September-December 2010 is estimated at a poor level of 9.15 million tonnes. Adding the two season harvests, the aggregate for 2010/11 (July-June) production is estimated at 16.79 million tonnes, some 8 percent recovery over the drought affected 2009/10 harvest.

The 2011 maize production of the secondary season (January-June 2011) is officially estimated at 3.3 million tonnes, show a significant recovery (937 percent) over the previous year's drought affected corresponding season. According to official sources, 14 provinces across northern Luzon Island and parts of central Visayas region were affected by drought the secondary season in 2010. The drought in the north and the centre of the country was estimated to cause damage of over USD 239 million. El Nino phenomenon has been blamed for the extreme dry weather.

As a result of improved harvests in 2010/11, with some stock building, the country's total cereal import requirements for 2011 are expected to remain under the normal level of 5 million tonnes. Since wheat is not produced in the country, the estimated requirements of some 3 million tonnes are all imported.

Rice prices remain stable but high

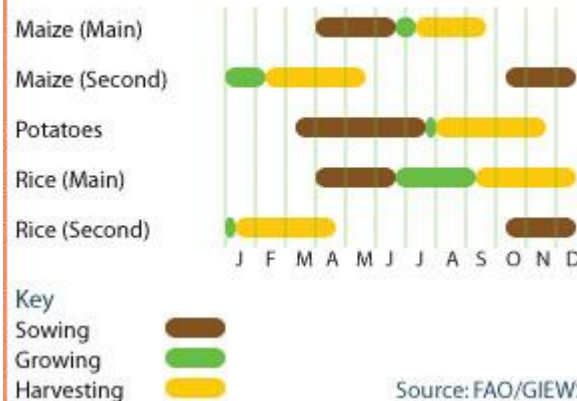
National average retail price of rice remains stabilize around PHP 30 per kg. Prices came down from its peak in June 2008 but they in general remain much higher than the usual pre-escalation period of late 2007-early 2008. Following the good harvest of the secondary season of maize, price of the commodity has come down in recent months.

Food insecurity persists in some areas of the country

Overall food security in the country is considered satisfactory except in certain areas affected by a tropical storm in late September and in Mindanao due to on-going internal conflict.

Since the beginning of 2009 the intensified conflict and subsequent security operations have swelled the ranks of the affected population to over 300 000. Food security situation has further deteriorated due to

Crop calendar Philippines



Philippines

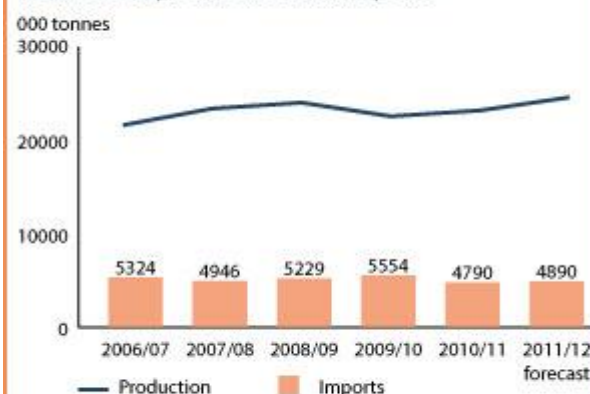
Cereal production

	2006-2010	2010	2011	change
	average		forecast	2011/2010
000 tonnes				
percent				
Rice (paddy)	16 304	16 789	17 300	3
Maize	6 632	6 377	7 266	14
Wheat	0	0	0	0
Others	0	0	0	0
Total	22 935	23 166	24 566	6

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

Philippines

Total cereal production and imports



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

the high prices of rice and the decline of remittances from abroad precipitated by the global financial crisis. WFP undertook an emergency operation (EMOP) from mid-2006 to mid-2010 for the conflict affected populations in Mindanao aimed at supporting over 2 million people.



Reference Date: 3-September-2010

FOOD SECURITY SNAPSHOT

- Forecast for 2010 main season paddy indicates favourable harvest.
- Prices of the main staple, rice, remain stable but high.
- Food insecurity persists in conflict affected areas of the country

Forecast for 2010 main season paddy indicates favourable harvest

Harvesting of the main season paddy crop is currently underway. FAO's preliminary forecast indicates favourable output. Adding the next secondary season harvest, the aggregate for 2010/11 (July-June) production is forecast at 17 million tonnes, some 10 percent recovery over the drought affected 2009/10 harvest.

The Bureau of Statistics estimated January-June 2010 harvests of paddy and maize at 6.605 and 3.218 million tonnes, lower by 25 and 11 percent, respectively, from the previous year's bumper harvests from the corresponding season. According to official sources, 14 provinces across northern Luzon Island and parts of central Visayas region were affected by drought this secondary season. El Nino phenomenon has been blamed for the extreme dry weather. The drought in the north and the centre of the country was estimated to cause damage of over USD 239 million. The second season paddy accounts for about 40-45 percent of annual output. The second season rice farming has gained importance in recent years due to high prices of the commodity.

Total paddy production in 2009/10 July/June marketing year (main season 2009 and second season 2010) is estimated 15.5 million tonnes, some 12 percent below the record harvest of the previous year. As a result of this, the country's total cereal import requirements for 2010 are expected to increase. Since wheat is not produced in the country, the estimated requirements of some 3 million tonnes are all imported.

Rice prices remain high but stable

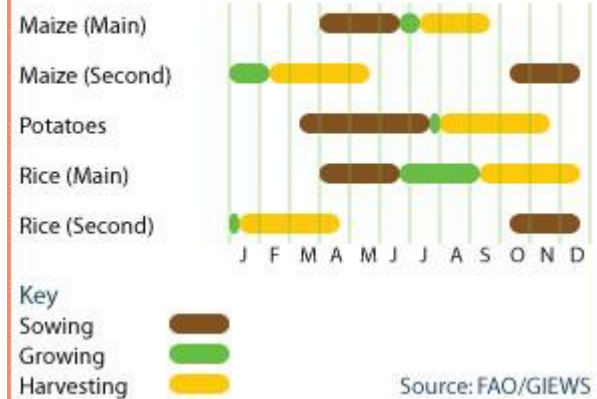
National average retail price of rice has stabilized at PHP 30 per kg. Prices have come down from its peak in June 2008 but they in general remain much higher than the usual pre-escalation period of late 2007-early 2008. The country being dependent on rice imports, domestic markets have experienced severe price fluctuations in the last two years as they have followed the international export market price, especially that of the neighbouring exporting country, Thailand. Following good harvest of maize, price of the commodity has come down in recent months.

Food insecurity persists in some areas of the country

Overall food security in the country is considered satisfactory except in certain areas affected by a tropical storm in late September and in Mindanao due to on-going internal conflict.

Since the beginning of 2009 the intensified conflict and subsequent

Crop calendar Philippines



Philippines

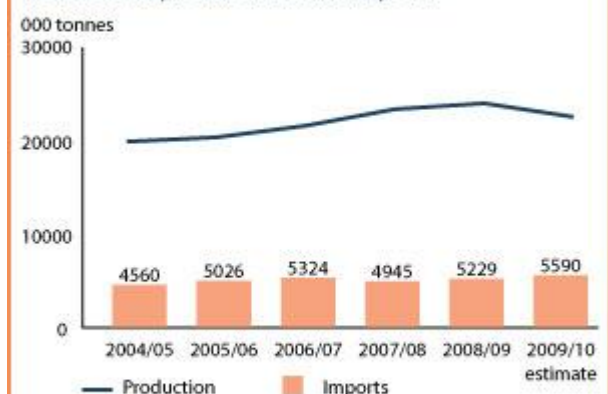
Cereal production

	2005-2009	2009	2010	change
	average		forecast	2010/2009
	000 tonnes			percent
Rice (paddy)	15968	15511	17000	10
Maize	6407	7034	7000	0
Rye	1	0	0	0
Others	0	0	0	0
Total	22376	22545	24000	6

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

Philippines

Total cereal production and imports



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

security operations have swelled the ranks of the affected population to over 300 000. Food security situation has further deteriorated due to the high prices of imported rice and the decline of remittances from abroad precipitated by the global financial crisis. WFP has continued an emergency operation (EMOP) since 2005, the latest appeal being worth USD 49.5 million, which aimed to support 2.1 million people with food distribution through June 2010.

Nearly 2 million people were affected by the tropical storm Ketsana which hit the northern island of Luzon on 26 September 2009 and caused heavy flooding in this main rice producing area. The Government has since declared “a state of calamity” for 25 provinces of the island and appealed for international assistance. Based on the joint Government and WFP/UN assessment an emergency operation (EMOP) has been put in place by WFP appealing for 25 800 tonnes of food for 1 million most affected people for a period of three months (October to December 2009).



Reference Date: 16-July-2010

FOOD SECURITY SNAPSHOT

- Significant drop in harvests of 2010 secondary season paddy and maize crops
- Prices of the main staple, rice, remain stable but high
- Food insecurity persists in conflict affected areas of the country

Significant drop in harvests of secondary season crops, paddy and maize

The Bureau of Statistics has estimated January-June 2010 harvests of paddy and maize at 6.605 and 3.218 million tonnes, lower by 25 and 11 percent, respectively, from the previous year's bumper harvests from the corresponding season. According to official sources, 14 provinces across northern Luzon Island and parts of central Visayas region were affected by drought this secondary season. El Nino phenomenon has been blamed for the extreme dry weather. The drought in the north and the centre of the country was estimated to cause damage of over USD 239 million. The second season paddy accounts for about 40-45 percent of annual output. The second season rice farming has gained importance in recent years due to high prices of the commodity.

Total paddy production in 2009/10 July/June marketing year (main season 2009 and second season 2010) is estimated 15.5 million tonnes, some 12 percent below the record harvest of the previous year. As a result of this, the country's total cereal import requirements for 2010 are expected to increase. Since wheat is not produced in the country, the estimated requirements of some 3 million tonnes are all imported.

Rice prices remain high but follow the international price trend

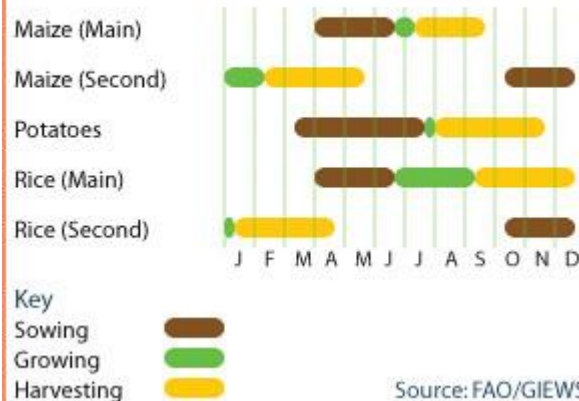
National average retail price of rice has stabilized at PHP 30 per kg. Prices have come down from its peak in June 2008 but they in general remain much higher than the usual pre-escalation period of late 2007-early 2008. The country being dependent on rice imports, domestic markets have experienced severe price fluctuations in the last two years as they have followed the international export market price, especially that of the neighbouring exporting country, Thailand.

Food insecurity persists in some areas of the country

Overall food security in the country is considered satisfactory except in certain areas affected by a tropical storm in late September and in Mindanao due to on-going internal conflict.

Since the beginning of 2009 the intensified conflict and subsequent security operations have swelled the ranks of the affected population to over 300 000. Food security situation has further deteriorated due to the high prices of imported rice and the decline of remittances from abroad precipitated by the global financial crisis. WFP has continued an emergency operation (EMOP) since 2005, the latest appeal being worth USD 49.5 million, which aimed to support 2.1 million people with food distribution through June 2010.

Crop calendar Philippines



Philippines

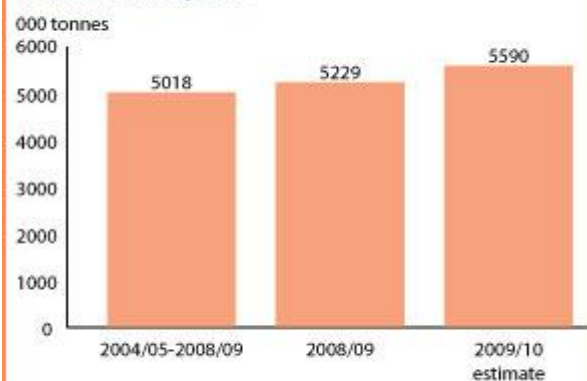
Cereal production

	2005-2009	2009	2010	change
	average		forecast	2010/2009
	000 tonnes			percent
Rice (paddy)	15963	15487	17000	10
Maize	6340	6235	6500	4
Rye	1	0	0	0
Others	0	0	0	0
Total	22304	21722	23500	8

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

Philippines

Total cereal imports



Nearly 2 million people were affected by the tropical storm Ketsana which hit the northern island of Luzon on 26 September 2009 and caused heavy flooding in this main rice producing area. The Government has since declared “a state of calamity” for 25 provinces of the island and appealed for international assistance. Based on the joint Government and WFP/UN assessment an emergency operation (EMOP) has been put in place by WFP appealing for 25 800 tonnes of food for 1 million most affected people for a period of three months (October to December 2009).



Reference Date: 01 April 2010

FOOD SECURITY SNAPSHOT

- Unfavourable prospects for the current secondary season paddy crop
- Prices of the main staple, rice, remain stable but high
- Food insecurity persists in conflict affected areas of the country

Disappointing harvest of the secondary season paddy crop

According to official sources, 14 provinces across northern Luzon Island and parts of central Visayas region have been affected by drought this secondary season. El Nino phenomenon has been blamed for the extreme dry weather. The current drought in the north and the centre of the country is estimated to cause damage of over USD 239 million. The drought followed excessive rains and floods in September 2009 in the same area of northern Luzon. The second season paddy accounts for about 40-45 percent of annual output. The second season rice farming has gained importance in recent years due to high prices of the commodity. Based on FAO estimates, the current second season paddy harvest may hover around 7 million tonnes, down by about 283 000 tonnes in 2008/09.

Total rice production in 2009 estimate has been revised downwards to 16 million tonnes, some 6 percent below the record harvest of the previous year. As a result of this, the country's total cereal import requirements for 2009/10 marketing year (July/June) are increased to 5.64 million tonnes of cereals. Since wheat is not produced in the country, the estimated requirements of some 3 million tonnes are all imported.

Rice prices remain high but follow the international price trend

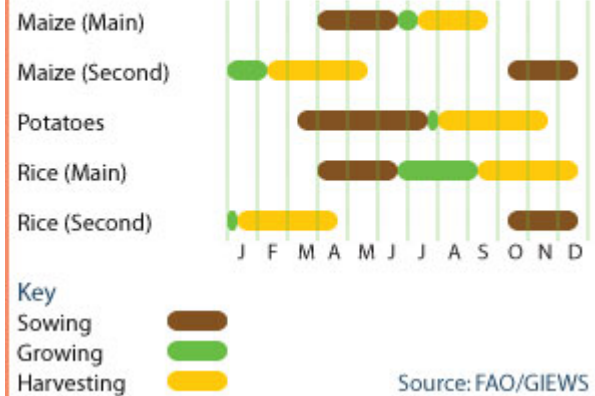
National average retail price of rice has stabilized at PHP 30 per kg. Prices have come down from its peak in June 2008 but they in general remain much higher than the usual pre-escalation period of late 2007-early 2008. The country being dependent on rice imports, domestic markets have experienced severe price fluctuations in the last two years as they have followed the international export market price, especially that of the neighbouring exporting country, Thailand.

Food insecurity persists in some areas of the country

Overall food security in the country is considered satisfactory except in certain areas affected by a tropical storm in late September and in Mindanao due to on-going internal conflict.

Since the beginning of 2009 the intensified conflict and subsequent security operations have swelled the ranks of the affected population to over 300 000. Food security situation has further deteriorated due to the high prices of imported rice and the decline of remittances from abroad precipitated by the global financial crisis. WFP has continued an emergency operation (EMOP) since 2005, the latest appeal being worth USD 49.5 million, which aims to support 2.1 million people with food

Crop calendar Philippines



Philippines

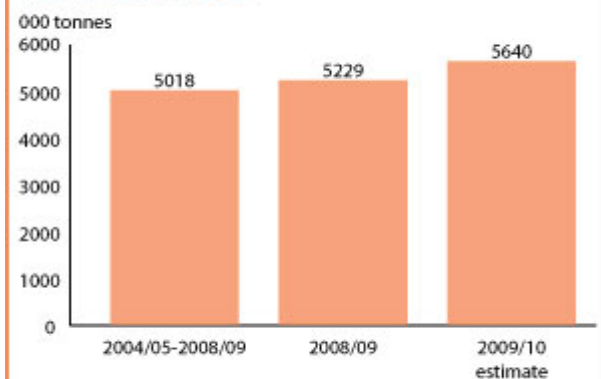
Cereal production

	2004-2008 average	2008	2009 estimate	change 2009/2008
	000 tonnes			percent
Rice (paddy)	15764	17070	15975	-6
Maize	6096	6930	7090	2
Rye	1	0	0	0
Total	21861	24000	23065	-4

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

Philippines

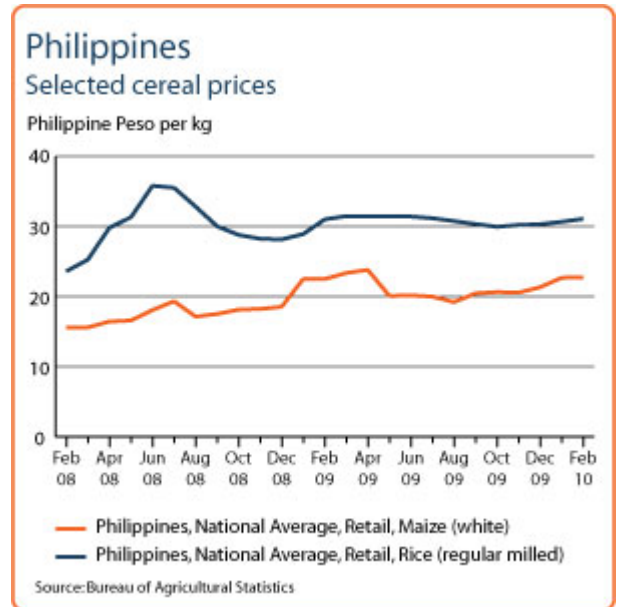
Total cereal imports



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

distribution through June 2010.

Nearly 2 million people were affected by the tropical storm Ketsana which hit the northern island of Luzon on 26 September 2009 and caused heavy flooding in this main rice producing area. The Government has since declared "a state of calamity" for 25 provinces of the island and appealed for international assistance. Based on the joint Government and WFP/UN assessment an emergency operation (EMOP) has been put in place by WFP appealing for 25 800 tonnes of food for 1 million most affected people for a period of three months (October to December 2009).



Reference Date: 02-October-2009

FOOD SECURITY SNAPSHOT

- Favourable prospects for the 2009 main season cereal crops to be harvested from November.
- Prices of the main staple, rice, remain high.
- Food insecurity persists in conflict affected areas of the country.

Good rainfall is expected to lead to another bumper harvest

The main season for rice and maize starts in July. Rainfall since June 2009 over most of the islands has been average or above average, and prospects for the harvest in November-December are fairly good. This is also due to an increased area planted under paddy. Total rice production in 2009 is forecast at a record level of 17.5 million tonnes, 2.5 percent above last year's bumper crop. An anticipated better harvest and high carryover stocks are expected to reduce the country's total cereal import requirements from 6 million tonnes in 2008/09 marketing year (July-June) to 5.1 million tonnes in 2009/10, including 1.8 million tonnes of rice. Since wheat is not produced in the country, the estimated requirements of some 3 million tonnes are all imported.

Rice prices remain high but follow the international price trend

National average retail price of rice has come down recently from its peak in June 2008 but prices in general remain much higher than the usual pre-escalation period of late 2007-early 2008. The country being dependent on rice imports, domestic markets have been severe ups and downs in last 12 months as they have followed the international export market price, especially that of the neighbouring exporting country, Thailand.

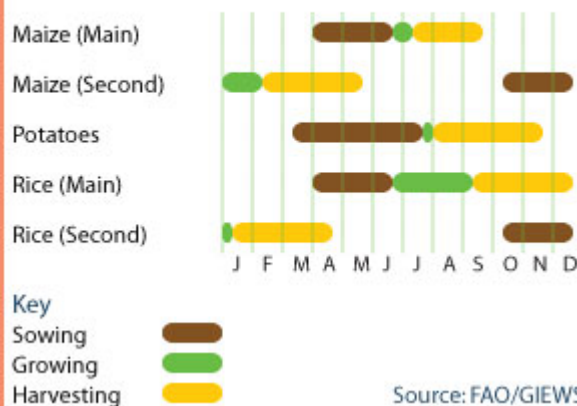
Food insecurity persists in conflict affected areas of the country

Overall food security in the country is considered satisfactory except in certain areas, especially those affected by a tropical storm in late September and the on-going internal conflict in Mindanao.

Since the beginning of this year the intensified conflict and subsequent security operations have swelled the ranks of the affected population to over 300 000. Food security situation has further deteriorated due to the high prices of imported rice and the decline of remittances from abroad precipitated by the global financial crisis. WFP has continued an emergency operation (EMOP) since 2005, the latest appeal being worth USD 49.5 million, which aims to support 2.1 million people with food distribution through June 2010.

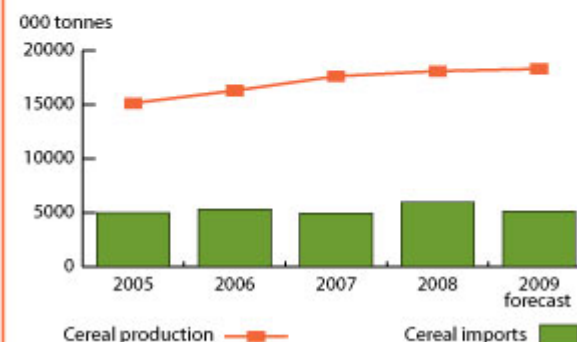
Nearly 2 million people were affected by the tropical storm Ketsana which hit the northern island of Luzon on 26 September 2009 and caused heavy flooding in this main rice producing area. The Government has since declared "a state of calamity" for 25 provinces of the island and appealed for international assistance. Based on the joint

Crop calendar Philippines



Cereal production and imports Philippines

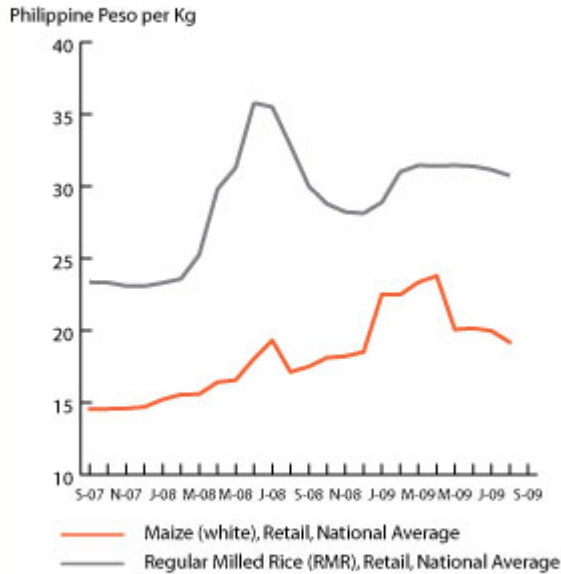
Cereal production	2004-2008 average	2008	2009 forecast	change 2009/2008
	000 tonnes		percent	
Rice (milled)	10322	11177	11459	2.5%
Maize	6096	6930	6850	-1.2%
Total Cereals	16418	18107	18309	1.1%



Source: FAO/GIEWS Country Cereal Balance Sheets

Government and WFP/UN assessment an emergency operation (EMOP) has been put in place by WFP appealing for 25 800 tonnes of food for 1 million most affected people for a period of three months (October to December 2009).

Philippines Selected food prices



Source: Bureau of Agricultural Statistics