



GIEWS Country Brief

The Democratic Socialist Republic of Sri Lanka

Reference Date: 16-June-2023

FOOD SECURITY SNAPSHOT

- Crop production in 2023 forecast below five-year average
- Cereal import requirements in 2023 estimated above five-year average
- Prices of cereals on decline, but remain at high levels in May
- Acute food insecurity level declines in 2023

Crop production in 2023 forecast below five-year average

According to a recent joint [FAO/WFP Crop and Food Security Assessment Mission \(CFSAM\)](#), 2023 aggregate paddy production is forecast at 3.8 million tonnes, 14 percent below the last five-year average. Yields of the 2022/23 main “Maha” crops, harvested in March, were mainly affected by the inadequate availability of fertilizers, particularly phosphorous and potassium, and their high prices. The output of maize, mostly used as feed, is projected at 272 100 tonnes, 13 percent below the average. By contrast, production of pulses is estimated to increase by 35 percent, forecast at 46 300 tonnes, reflecting strong domestic demand and remunerative prices that sustained the area planted. Production of root crops is expected at 9 percent below the average, mainly due to reduced outputs of potatoes and manioc, reflecting contraction of the sown areas associated with shortages of seeds.

The livestock sector has been severely affected in 2023, particularly the production of chicken meat and eggs, important sources of protein in the local diet, due to high feed prices and hatchery closures.

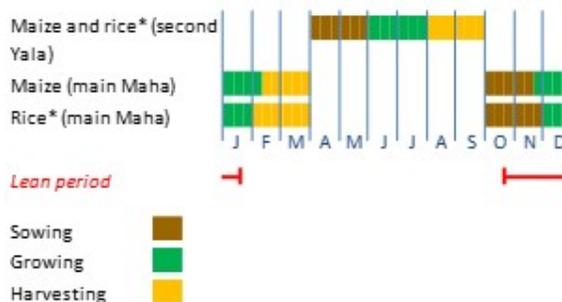
Cereal import requirements in 2023 estimated above five-year average

Total cereal import requirements in 2023 are forecast at an above-average level of 1.8 million tonnes, including 1.16 million tonnes of wheat, 130 000 tonnes of maize, 465 000 tonnes of rice and 200 000 tonnes of potatoes. The 2023 food deficit is expected to be fully covered by commercial imports as the financial capacity of the country to import has strengthened following the slight increase of foreign exchange reserves, the disbursement of donor funds and the modest currency appreciation, since last March.

Sri Lanka

Crop Calendar

(*major foodcrop)



Sri Lanka

Cereal Production

	2018-2022 average	2022	2023 forecast	change 2023/avg. percent
	000 tonnes			
Rice (paddy)	4 437	3 393	3 800	-14.3
Maize	312	259	272	-12.8
Millet	8	11	9	10.4
Total	4 757	3 663	4 081	-14.2

Note: Percentage change calculated from unrounded data.

Prices of cereals on decline, but remain at high level in May

Between September 2021 and July 2022, domestic prices of the commonly consumed white rice variety surged by 140 percent, underpinned by tight market availability caused by the sharp reduction in the 2022 “Maha” output. High production and transport costs as well as disruptions of marketing activities due to severe shortages of fuel also contributed to increase prices. Since August 2022, prices of rice started to decline, reflecting the arrival of imported rice and the commercialization of 2023 crops. Overall, prices of rice in May were 7 percent below the previous year’s elevated level, but 86 percent above the pre-crisis level (September 2021). Prices of wheat flour, entirely imported, increased more than threefold between September 2021 and August 2022. The surge was due to tight market availability following reduced imports in 2021 and early 2022 associated with the sharp depreciation of the national currency and increasing price trends in the international markets. Domestic wheat flour prices have declined since October 2022, reflecting increased imported quantities and low international wheat flour quotations. As of May 2023, prices were still close to the high levels a year earlier and more than 130 percent above the pre-crisis level.

Although food inflation has declined since October 2022, it remains at high levels and, in May 2023, it was estimated to be above 20 percent.

Acute food insecurity level decline in 2023

The recently-released CFSAM report indicates that about 3.9 million people (17 percent of the population) are estimated to be moderately acute food insecure and 10 000 people to be severely acute food insecure.¹ This represents an improvement compared to May 2022, when 6.2 million were estimated to be moderately acute food insecure and 66 000 people were severely acute food insecure. It reflects some improvements in food consumption and the decrease in the share of expenditures on food, which is likely to be caused by improved agricultural production. This, in turn, has increased income-earning opportunities for farmers and related livelihood groups, while contributing to a softening of food prices.

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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/>.

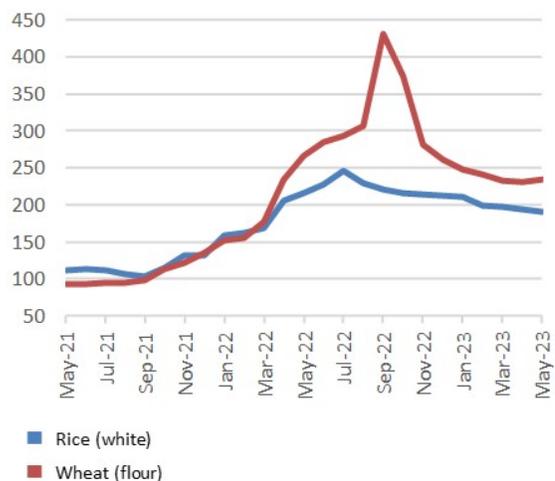
FAO/GIEWS Earth Observation for Crop Monitoring <https://www.fao.org/giews/earthobservation/>.

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

Sri Lanka

Retail prices of rice and wheat flour in Colombo

Sri Lanka rupee per kg





GIEWS Country Brief Sri Lanka

Reference Date: 27-September-2022

FOOD SECURITY SNAPSHOT

- Economic crisis causes sharp drop in agricultural production in 2022
- Cereal import requirements in 2022 estimated above five-year average
- Prices of cereals and imported basic food products at high levels in August 2022
- Acute food insecurity increases

Economic crisis causes sharp drop in agricultural production in 2022

The 2022 secondary “Yala” paddy crop, accounting for about 30 percent of the annual production, is currently being harvested, while the harvest of the 2022 main “Maha” paddy crop finalized in March. According to a recent joint [FAO/WFP Crop and Food Security Assessment Mission \(CFSAM\)](#), the 2022 aggregate paddy production is forecast at 3 million tonnes, about 40 percent less than the 2021 output and the lowest level since the 2017 drought-affected output. The poor performance is mostly due to low yields caused by reduced application of chemical fertilizers and pesticides. Between May and November 2021, an import ban on agrochemicals was in place aiming to transform the country’s agricultural sector into exclusive organic agriculture. Although the ban was lifted in late November 2021 following months of protests by farmers, severe economic challenges hampered import flows, resulting in a severe shortage and high prices of agrochemicals.

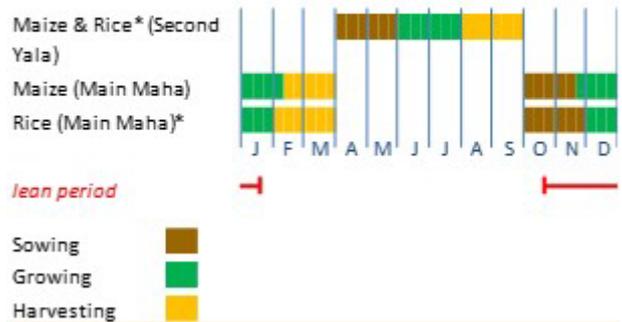
The output of maize, potatoes and millet, vegetables and annual fruits, as well as export crops, such as tea, rubber and coconut, is estimated to be sharply below the previous five-year average mostly as a result of the limited application of chemical fertilizers and pesticides.

The livestock sector has been also severely affected in 2022, particularly the production of chicken meat and eggs, the main source of protein in the local diet. Shortages and high costs of inputs, including animal feed, electricity and fuel, have forced many poultry and egg production units to close. Similar factors affected the production of beef and mutton meat as well as cattle and buffalo milk in 2022, with fuel shortages and electricity cuts compounding the situation. Animal husbandry extension services have been interrupted, leading to limited vaccinations, treatments and artificial inseminations, with deterioration of animal health conditions. Difficulties in animal transportation and milk collection,

Sri Lanka

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Sri Lanka

Cereal Production

	2017-2021	2021	2022	change
	average			forecast
000 tonnes				
Rice (paddy)	4 235	5 150	3 080	-40.2
Maize	307	475	187	-60.6
Millet	6	6	6	0.0
Total	4 548	5 631	3 273	-41.9

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

coupled with power cuts, resulted in increased product losses and lower income to farmers.

Cereal import requirements in 2022 estimated above five-year average

The total cereal import requirement in 2022 is estimated at 2.2 million tonnes. In the first six months of 2022, a total of 932 000 tonnes of cereals have already been imported (472 000 tonnes of rice, 425 000 tonnes of wheat and 35 000 tonnes of maize), leaving an outstanding import requirement of about 1.27 million tonnes of cereals for 2022. Given persisting macroeconomic challenges, particularly the very low level of foreign reserves, there is a serious risk that the full import requirement of cereals could not be met.

Prices of cereals and imported basic food products at high levels in August 2022

Domestic prices of most basic food items, including imported wheat flour, sugar, milk powder and onion, as well as locally-produced chicken meat, eggs and coconut oil, have been on a steady increase since the last quarter of 2021 and were at elevated levels in August. Price increases were associated with tight market availabilities, after the economic challenges caused major decreases to agricultural production and had a negative impact on the country's capacity to import. Severe fuel shortages disrupted the distribution of food supplies within the country, creating shortages in most markets and adding to the upward pressure on prices. Domestic prices of rice decreased last August for the first time since October 2021, with the start of the 2022 "Yala" harvest. However, prices remained more than two times higher than their year-earlier levels. According to the Central Bank of Sri Lanka, in August 2022, the Consumer price index (CPI) was estimated at 64.3 percent, while the food component of the CPI increased by 93.7 percent compared to the previous year.

Acute food insecurity increases

According to the recently-released CFSAM report, the food and nutrition security has deteriorated since the beginning of 2022, with over 6.2 million people (28 percent of the population) estimated to be moderately acute food insecure¹ while 66 000 are severely acute food insecure and in need of immediate food assistance. Large numbers of vulnerable households have been widely adopting food and livelihood-related coping strategies, including cutting the number of meals consumed in a day, reducing meal sizes and purchasing food on credit. The highest level of acute food insecurity is in the estate sector (tea production) and among female-headed households, households with no education, Indian Tamil population and Samurdhi programme beneficiaries.

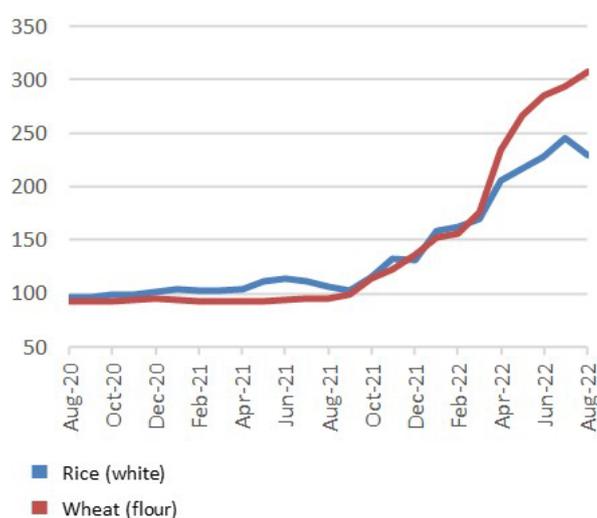
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¹ Acute food insecurity has been estimated based on WFP's Consolidated Approach for Reporting Indicators of Food Security (CARI) Guidelines. According to the CARI standard methodology used to classify the household's acute food insecurity, "moderately acute food insecurity" is an approximation of the Integrated Food Security Phase Classification (IPC) Phase 3 (Crisis), while "severely acute food insecurity" is an approximation of the IPC Phase 4 (Emergency) or above.

Sri Lanka

Retail prices of rice and wheat flour in Colombo

Sri Lanka rupee per kg



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



GIIEWS Country Brief Sri Lanka

Reference Date: 27-September-2022

FOOD SECURITY SNAPSHOT

- Economic crisis causes sharp drop in agricultural production in 2022
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Economic crisis causes sharp drop in agricultural production in 2022

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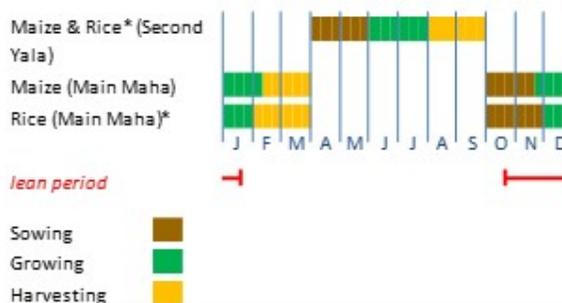
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Sri Lanka

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Sri Lanka

Cereal Production

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	000 tonnes			percent
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Source: FAO/GIEWS Country Cereal Balance Sheet.

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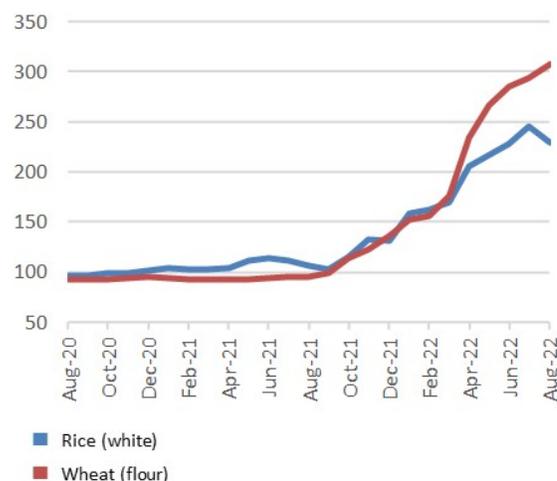
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Sri Lanka

Retail prices of rice and wheat flour in Colombo

Sri Lanka rupee per kg



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

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GIEWS Country Brief Sri Lanka

Reference Date: 03-March-2022

FOOD SECURITY SNAPSHOT

- Unfavourable prospects for 2022 main cereal output due to shortages of agricultural chemicals
- Above-average cereal production obtained in 2021
- Cereal import requirements in 2022 forecast at above five-year average
- Prices of cereals and imported basic food products at high levels in February 2022
- Economic downturn and high food prices affect purchasing power of vulnerable households

Shortages of agricultural chemicals threaten 2022 main cereal output

Harvesting of the 2022 main “Maha” paddy crop, accounting for about 70 percent of the annual production, is ongoing and is expected to finalize at the end of March. The area planted with paddy is estimated to be close to the previous year’s above-average level, driven by high prices and favourable weather conditions at planting time. However, shortages and high prices of agricultural chemicals resulted in their reduced application, with a negative impact on yields in most parts of the country. Therefore, there are concerns that the main “Maha” paddy production could be below average in 2022.

Similarly, the outputs of other crops such as maize, potatoes and millet, are expected to decrease compared with the average levels as a result of agricultural chemical shortages.

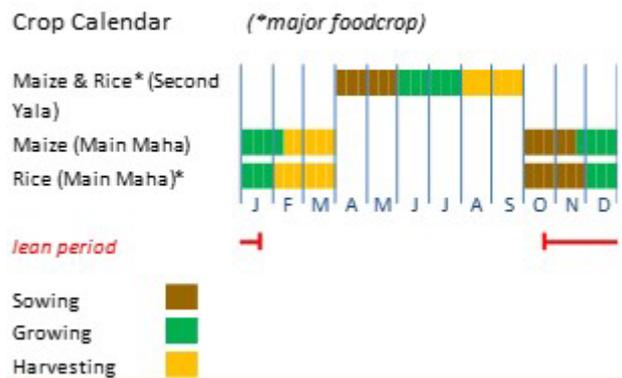
Above-average cereal production obtained in 2021

The 2021 cropping season finalized in September and the aggregate cereal production is estimated at 5.7 million tonnes, about 30 percent above the five-year average. Production of paddy is officially estimated at an above-average level of 5.15 million tonnes, reflecting high plantings. The output of maize is estimated at a record 496 400 tonnes, reflecting high area planted, supported by strong domestic demand, while favourable weather conditions led to bumper yields.

Cereal import requirements in 2022 forecast above five-year average

In the 2022 calendar year, import requirements of wheat (not produced in the country) and wheat flour, account for the largest

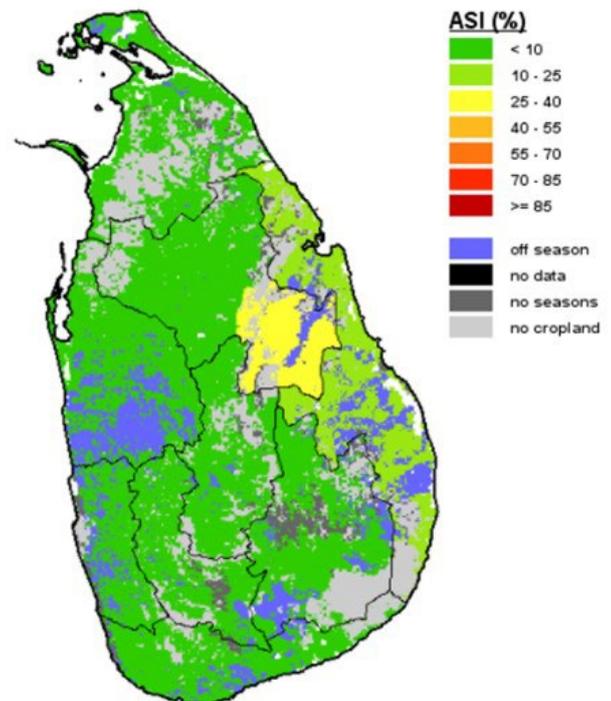
Sri Lanka



Source: FAO/GIEWS.

Sri Lanka - Agricultural Stress Index (ASI)

from start of season 1 to dekad 3, January 2022



Source: FAO/GIEWS Earth Observation System.

share of national cereal imports, are forecast at a near-average level of 1.3 million tonnes. The country is almost self-sufficient in rice and imports large quantities only when local production is not sufficient to cover the domestic needs. In calendar year 2022, imports of rice are forecast at 600 000 tonnes, the highest level since 2017, due to expectations of a reduced output in 2022 and government measures to boost imports, including the reduction of charges levied on imported rice and purchases through official channels.

Prices of cereals and imported basic food products at record highs in February 2022

Prices of rice, the country's main staple food, surged in most markets between September 2021 and January 2022, reaching new record highs in February, about 55 percent above their year-earlier levels. Price increases were underpinned by the depreciation of the national currency and concerns over the production of the 2022 main "Maha" crop. Similarly, prices of a wide range of imported basic food items, including wheat flour (not produced in the country), sugar, dried milk and pulses, have increased since last September and reached, in many cases, high levels in February 2022.

Economic downturn and high food prices affect purchasing power of vulnerable households

The macroeconomic situation in the country has deteriorated since 2021 mostly reflecting dwindling foreign currency reserves after revenues from merchandise exports and from the tourist sector were affected by the COVID-19 pandemic and its containment measures. The reduction in economic activities have caused widespread loss of income and livelihoods, sharply reducing households' purchasing power. This is of particular concern as domestic prices of basic food items have been rising since mid-2021, seriously limiting households' access to food.

Sri Lanka

Cereal Production

	2016-2020 average	2020	2021 estimate	change 2021/2020
	000 tonnes			percent
Rice (paddy)	4 089	5 121	5 150	0.6
Maize	260	347	496	43.1
Millet	6	6	6	0.0
Total	4 355	5 474	5 652	3.3

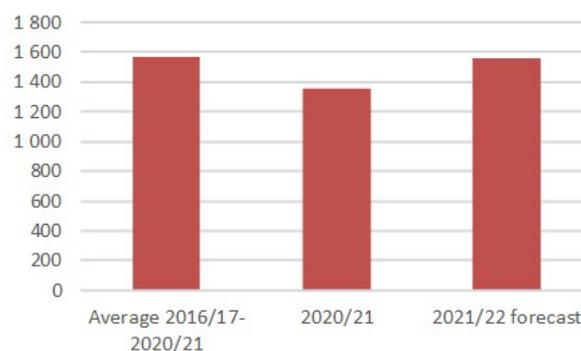
Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Sri Lanka

Cereals Imports

000 tonnes



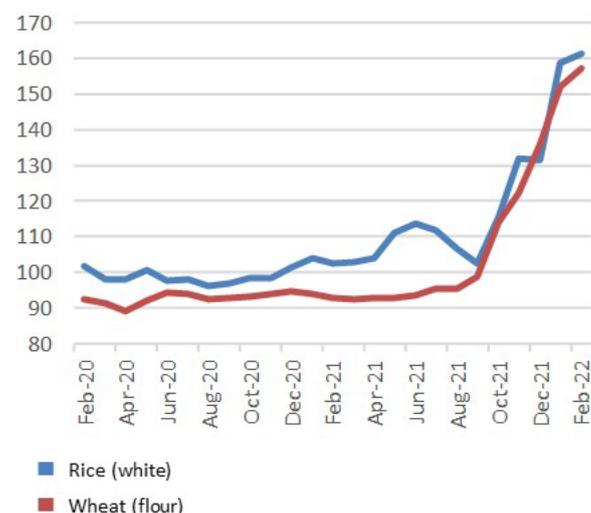
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Sri Lanka

Retail prices of rice and wheat flour in Colombo

Sri Lanka Rupee per kg



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



GIEWS Country Brief Sri Lanka

Reference Date: 23-December-2020

FOOD SECURITY SNAPSHOT

- Area planted with 2021 main “Maha” cereal crops forecast above-average level
- Record cereal production obtained in 2020
- Cereal import requirements in 2020 forecast below five-year average
- Domestic prices of rice above year-earlier levels throughout 2020
- Food security overall good, but COVID-19 pandemic having negative impact on vulnerable households

Area planted with 2021 main “Maha” cereal crops forecast above-average level

The bulk of the 2021 main “Maha” paddy crop, accounting for about 70 percent of the annual production, was planted between October and December. Harvesting operations are expected to start in February. Overall, precipitation amounts since October have been close to average over the main paddy producing areas, benefitting planting activities and germination of crops. The attractive prices and Government support in the form of free irrigation water and fertilizer subsidies are also expected to sustain plantings. Favourable precipitations also supported the generally above-average growing conditions for the paddy crop in the main producing areas in North Western, North Central, Eastern and Uva provinces (see ASI).

The 2020 main “Maha” maize crop, for harvest from February onwards, is growing under generally favourable weather conditions. The area planted is forecast at an above-average level, reflecting the high demand by the local feed industry.

Record cereal production obtained in 2020

The 2020 cropping season finalized in September and the aggregate cereal production is estimated at a record of 5.5 million tonnes. The production of paddy is estimated at a record of 5.1 million tonnes, thanks to continued Government support, favourable weather conditions and adequate irrigation water supplies. Similarly, the output of maize reached a bumper level of 364 000 tonnes as a result of record plantings, driven by the strong demand of the local feed industry and above-average yields supported by favourable weather conditions.

Sri Lanka

Crop Calendar

(*major foodcrop)

Maize & Rice* (Second

Yala)

Maize (Main Maha)

Rice (Main Maha)*



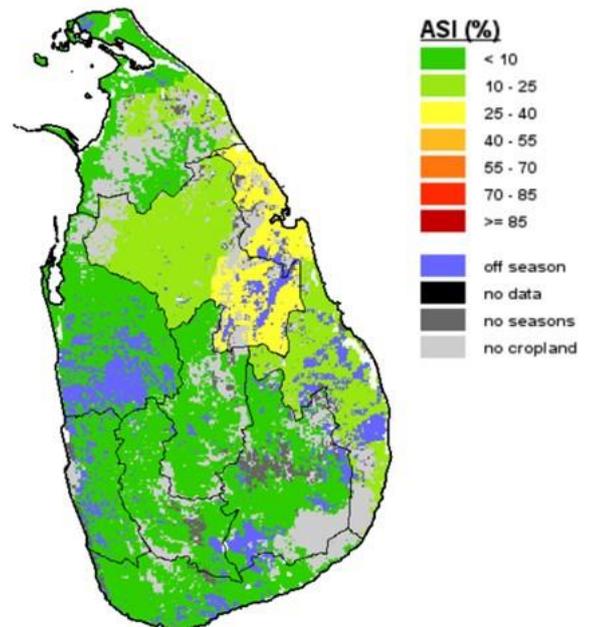
lean period

Sowing
Growing
Harvesting

Source: FAO/GIEWS.

Sri Lanka - Agricultural Stress Index (ASI)

from start of season 1 to dekad 1, December 2020



Source: FAO/GIEWS Earth Observation System.

Cereal import requirements in 2021 forecast below five-year average

In the 2021 calendar year, import requirements of wheat, which is not produced in the country and accounts for the largest share of imports, are forecast at 1.2 million tonnes, close to the five-year average. Similarly, import requirements of maize are expected to remain at an average level of 100 000 tonnes. The country is almost self-sufficient in rice and imports were large quantities only when local production is not sufficient to cover the domestic needs. Imports of rice are forecast at 30 000 tonnes in calendar year 2021.

Domestic prices of rice generally high and stable since March 2020

Prices of rice, the country's main staple food, increased steadily between August 2019 and January 2020. Subsequently, prices decreased in February and March and remained generally stable since then, reflecting good market availabilities from the 2020 harvest. Overall, rice prices were at high levels throughout 2020.

On 4 November 2020, the Government amended the Maximum Retail Prices (MRP) for different types of rice in order to protect consumers from price hikes. The MRPs have been set as follows: LKR 89/kg for raw rice, LKR 92/kg for Nadu (excluding Mottaikarupan and Attakari) and LKR 94/kg for Samba rice.

Prices of imported wheat flour generally decreased between November 2019 to April 2020, weighed by adequate market supplies. Since May, prices showed an increasing trend, reflecting supply disruptions due to movement restriction related to the COVID-19 pandemic and trends in the international markets.

Food security situation overall good, but COVID-19 pandemic having negative impact on vulnerable households

The overall food security situation is good, following two consecutive years of bumper harvests. However, the COVID-19 pandemic has seen severely affected the local economy, with a significant negative impact on the most vulnerable households. According to the latest data by the Asian Development Bank, the economic growth is estimated to contract by 5.5 percent in 2020, the first contraction in 19 years, reflecting the weak performance in construction, textile, mining, tourism and tea sectors. The reduction in economic activities have caused widespread loss of income and livelihoods, sharply reducing the households' purchasing power and limiting their ability to buy foods.

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Sri Lanka

Cereal Production

	2015-2019	2019	2020	change
	average	000 tonnes		2020/2019
			estimate	percent
Rice (paddy)	4 029	4 592	5 150	12.1
Maize	243	246	364	48.3
Millet	6	5	6	20.0
Total	4 278	4 843	5 520	14.0

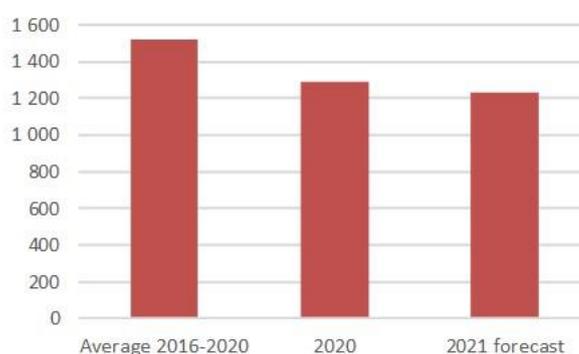
Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Sri Lanka

Cereals Imports

000 tonnes



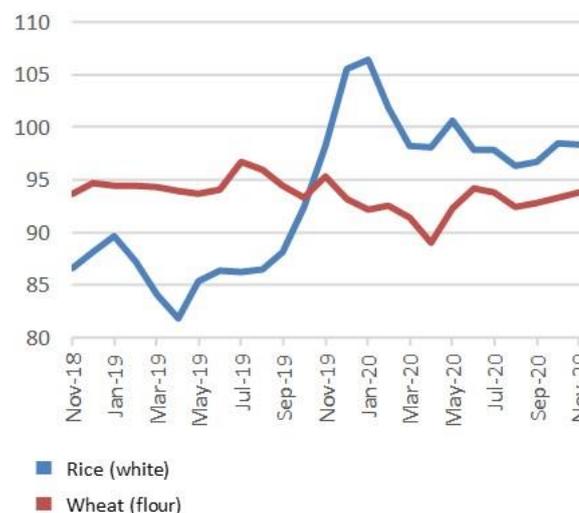
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Sri Lanka

Retail prices of rice and wheat flour in Colombo

Sri Lanka Rupee per kg



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



GIEWS Country Brief Sri Lanka

Reference Date: 02-June-2020

FOOD SECURITY SNAPSHOT

- Paddy crop production in 2020 forecast at above-average level
- Cereal import requirements in 2020 forecast below five-year average
- Domestic prices of rice well above year earlier levels in March

Paddy crop production in 2020 forecast at above-average level

Harvesting of the 2020 main “Maha” paddy crop was completed in March and farmers are currently planting the 2020 secondary “Yala” crop, for harvest in August and September. The “Maha” production is officially estimated at 3.1 million tonnes, 23 percent above the previous five-year average. Remunerative prices and Government support, in the form of free irrigation water supplies and fertilizer subsidies, ensured well above-average plantings, while generally favourable weather conditions prevailed. Similarly, production prospects for the 2020 secondary “Yala” crop are generally favourable. Seasonal weather forecasts for the May-July 2020 period indicate a higher likelihood of average to above-average rainfall over most of the country. Overall, the 2020 aggregate paddy output is forecast at a well above-average level of 4.7 million tonnes.

Harvesting of the 2020 main “Maha” maize crop finalized in March and production is officially estimated at a record of 310 000 tonnes. This is the result of the high level of plantings, driven by strong demand from the feed industry and above-average yields supported by generally favourable weather conditions. Assuming an average output of the ongoing secondary “Yala” maize crop, the aggregate 2020 maize production is forecast at 335 000 tonnes, about 40 percent above the five-year average.

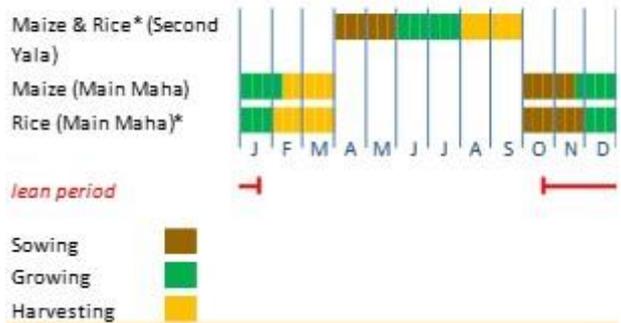
Cereal import requirements in 2020 forecast below five-year average

In the 2020 calendar year, import requirements of wheat, which is not produced in the country and accounts for the largest share of imports, are forecast at 1.1 million tonnes, close to the five-year average. Similarly, import requirements of maize are expected to remain at an average level of 100 000 tonnes. By contrast, imports of rice are forecast at 10 000 tonnes, reflecting the near-record output expected in 2020. Overall, cereal import

Sri Lanka

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Sri Lanka

Cereal Production

	2015-2019 average	2019	2020 forecast	change 2020/2019
	000 tonnes			percent
Rice (paddy)	4 029	4 592	4 670	1.7
Maize	242	234	335	43.2
Millet	6	5	6	20.0
Total	4 276	4 831	5 011	3.7

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

requirements in the 2020 calendar year are estimated at 1.25 million tonnes, about 20 percent below the average.

Domestic prices of rice well above year-earlier levels in March

Prices of rice increased steadily between August 2019 and January 2020, supported mostly by low imports. Subsequently, prices decreased in February and March with the onset of the 2020 main “Maha” season crop, which improved market availabilities. Prices, however, in March remained about 20 percent above their year-earlier levels.

On 10 April 2020, the State-run Consumer Affairs Authority (CAA) announced the new [Maximum Retail Prices \(MRP\)](#) for rice that entered into force with immediate effect. MRPs are set by the Government to protect consumers from food price hikes. The MRPs have been set as follows: LKR 85 per kg for raw rice, LKR 90 per kg for Nadu and Samba rice and LKR 125 per kg for Keeri Samba. Control prices for vegetables were also set on 27 March 2020.

Prices of imported wheat flour remained steady between January and March 2020 and were, as of March 2020, slightly below their year-earlier levels reflecting adequate availabilities from imports.

COVID-19 and measures adopted by the Government

As a measure to contain the spread of COVID-19, the Government imposed restrictions on international and domestic travels, prohibited large gatherings of people and closed schools and universities. In addition, all international incoming vessels and planes have been suspended, except for cargo and humanitarian shipments. Only economic activities deemed essential were permitted to operate, including the food supply chain. Nevertheless, permits were required in order to be allowed to transport food. As some disruptions to agricultural operations have been reported, the Government took measures to assist actors across the sector in order to enable domestic production and commercialization of food as well as the work of export activities.

The Government has also implemented some measures to ease the economic burden on households during the lockdown, including the establishment of price ceilings on essential food items as well as the provision of concessional loans and food allowances to low-income consumers. Market surveillance and monitoring activities have been strengthened in order to limit the potential overpricing of food products. Furthermore, special credit schemes and rescheduling of loan payments are being implemented.

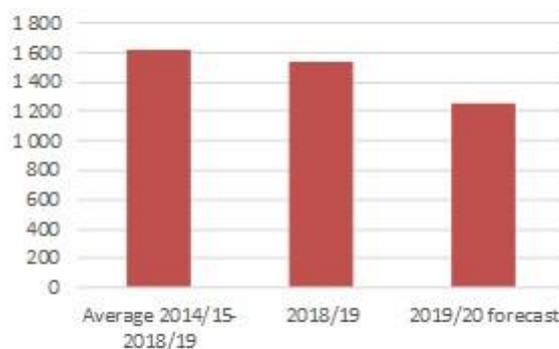
The country relies on imports of horticultural foods, such as onions, lentils, legumes and dried chilies, to cover the domestic demand. As export restrictions of food in the country’s main suppliers may be enforced due to the COVID-19 pandemic, the Government has been implementing measures to increase the area planted of these food items.

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Sri Lanka

Cereals Imports

000 tonnes



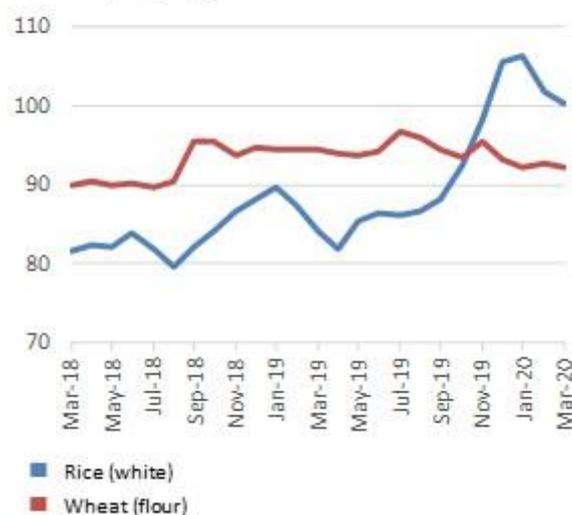
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Sri Lanka

Retail prices of rice and wheat flour in Colombo

Sri Lanka Rupee per kg



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



GIEWS Country Brief Sri Lanka

Reference Date: 27-May-2019

FOOD SECURITY SNAPSHOT

- Production of 2019 paddy crop forecast at bumper level
- Cereal import requirements in 2019 expected to decline for second consecutive year
- Prices of rice declined since beginning of 2019, while prices of wheat stable
- Food security conditions generally good

Production of 2019 paddy crop forecast at bumper level

Harvesting of the 2019 main “maha” paddy crop finalized at the end of March, while planting of the 2019 secondary “yala” paddy crop is ongoing and will be completed by the end of May. The “maha” output is officially estimated at 2.9 million tonnes, 22 percent above the five-year average, reflecting above-average planted area, mainly driven by remunerative prices and average yields, supported by adequate and well-distributed rainfall. Similarly, production prospects for the secondary “yala” crop, to be harvested in August and September, are favourable on expectations of average yields and an increase in the planted area compared to last year’s average level. Overall, the 2019 aggregate paddy output is preliminarily forecast at a bumper level of 4.5 million tonnes, 18 percent above the near-average level in 2018.

Harvesting of the 2019 main “maha” maize crop finalized in March and production is estimated at about 275 000 tonnes, 25 percent above the five-year average, as the expansion in plantings more than offset the damage inflicted by the Fall Armyworm infestation in the districts of Anuradhapura, Ampara, Badulla and Monaragala. In these areas, as of 15 April, official reports indicate that about 50 percent of the area cultivated with maize was affected and crop losses were estimated at 10 percent of the initially expected output. Assuming an average output of the ongoing secondary “yala” maize crop, to be harvested between August and September 2019, the aggregate 2019 maize production is forecast at 310 000 tonnes, about 23 percent above the five-year average.

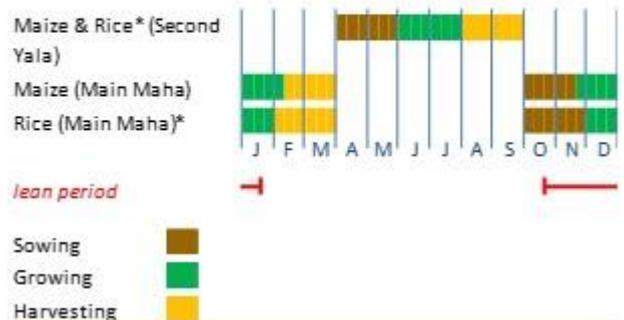
Cereal import requirements in 2019 expected to decline for second consecutive year

Cereal import requirements in the 2019 calendar year are forecast at 1.4 million tonnes, accounting for the second

Sri Lanka

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Sri Lanka

Cereal Production

	2014-2018	2018	2019	change
	average			2019/2018
000 tonnes				
				percent
Rice (paddy)	3 762	3 807	4 500	18.2
Maize	250	306	310	1.2
Millet	5	6	5	-16.7
Total	4 017	4 119	4 815	16.9

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

consecutive annual decline since 2017, when imports reached a record high due to the impact of drought on local production.

Import requirements of wheat in the 2019 calendar year, which account for the largest share of imports, are forecast at 1.2 million tonnes, virtually unchanged compared to the average level in 2018, reflecting sustained demand from the milling industry. Similarly, import requirements of maize are expected to remain at 130 000 tonnes, close to the above-average level in 2018, reflecting growing demand for food and feed use. By contrast, import requirements of rice in the 2019 calendar year are forecast at a well below-average level of 50 000 tonnes, reflecting ample domestic availabilities from the 2018 paddy output and expectations of a bumper crop in 2019.

Prices of rice declined since beginning of 2019, while prices of wheat stable

Prices of rice firmed up steadily since September 2018 until January 2019, in line with seasonal trends and declined between February and April 2019, pressured by the harvest of the main “maha” paddy crop. Overall, prices of rice in April 2019 were close to their year-earlier levels.

Prices of wheat flour remain overall stable in 2019 so far, reflecting adequate availabilities from imports. Overall, prices of wheat were slightly above their year earlier levels in April 2019.

Food security conditions generally good

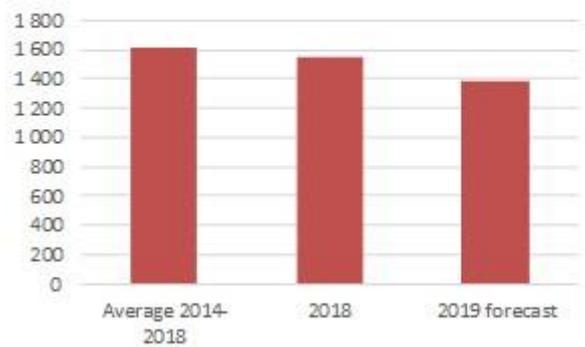
Overall, the country is food secure and has recovered from the 2017 drought that affected approximately 900 000 people.

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Sri Lanka

Cereals Imports

000 tonnes

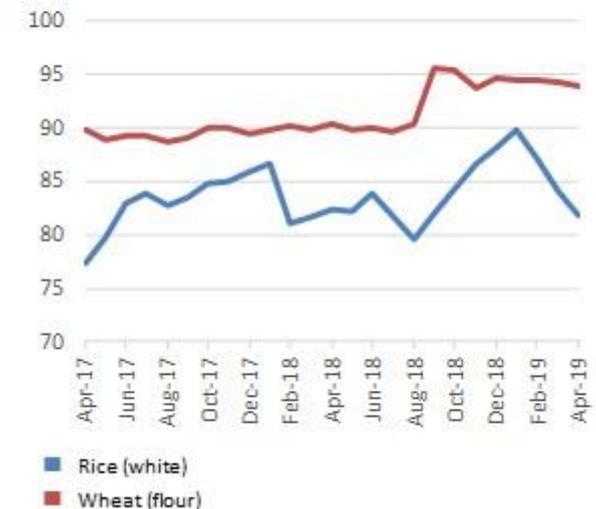


Source: FAO/GIEWS Country Cereal Balance Sheets.

Sri Lanka

Retail prices of rice and wheat flour in Colombo

Sri Lanka Rupee per kg



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



GIEWS Country Brief Sri Lanka

Reference Date: 11-December-2018

FOOD SECURITY SNAPSHOT

- Concerns about 2019 paddy crops due to likely occurrence of El Niño
- Cereal output in 2018 estimated at average level
- Cereal import requirements in 2018 forecast at near average levels
- Prices of rice increased, while prices of wheat declined in November
- Overall food security stable
- Food security conditions generally good, but concerns remain due to likelihood of El Niño

Concerns about 2019 paddy crops due to likely occurrence of El Niño

Planting of the 2019 main paddy *Maha* crop, to be harvested between February and March, started in October and finalized at the end of November. Overall weather conditions since September have been favourable, with cumulative rainfall at average levels in the main producing areas, benefiting moisture conditions and early crop development.

However, latest reports from the International Research Institute (IRI) for Climate Change and Society indicate that there are high probabilities of the occurrence of an El Niño event in 2018/19. This is forecast to trigger below average rains in most of the country until April next year, bearing a high risk for the 2019 main *Maha* paddy output as well as the early development stages of the secondary *Yala* paddy season, to be sown in April and May.

Cereal output in 2018 estimated at average level

The 2018 cropping season finalized in September and aggregate paddy output is officially estimated close to the five-year average at 3.8 million tonnes, about 60 percent above last year's drought-reduced level. Average and above average yields for both the *Maha* and *Yala* seasons have been reported as a result of favourable weather conditions and improved rainfall from the 2017/18 northeast monsoon that replenished reservoirs.

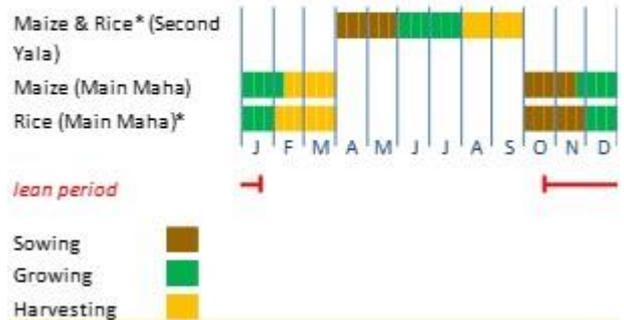
The 2018 aggregate maize output is estimated at 240 000 tonnes, close to the five-year average.

Cereal import requirements in 2018 forecast at

Sri Lanka

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Sri Lanka

Cereal Production

	2013-2017	2017	2018	change
	average		estimate	2018/2017
000 tonnes				
				percent
Rice (paddy)	3 925	2 383	3 807	59.7
Maize	234	180	240	33.3
Millet	5	6	6	0.0
Total	4 165	2 569	4 053	57.7

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

near average levels

The aggregate cereal import requirements in 2018 are forecast at a near average level of 1.6 million tonnes, a significant decline compared to 2017's record when paddy production was severely affected by drought. In particular, wheat import requirements are forecast at 1.2 million tonnes, about 10 percent above the five-year average and close to last year's high level reflecting sustained demand by the domestic milling industry.

Prices of rice increased, while prices of wheat flour declined in November

Prices of rice have increased in November for the third consecutive month following seasonal patterns. Overall, prices of rice were close to their level one year ago.

Prices of wheat flour increased in September after a long period of stability following the decision of PRIMA, the country's main wheat milling company, to increase its prices on 1 September due to higher international wheat prices and a weaker currency. Subsequently, however, the price hike has reversed. Prices of wheat flour declined slightly in November but remained moderately above their year earlier levels.

Food security conditions generally good, but concerns remain due to likely occurrence of El Niño

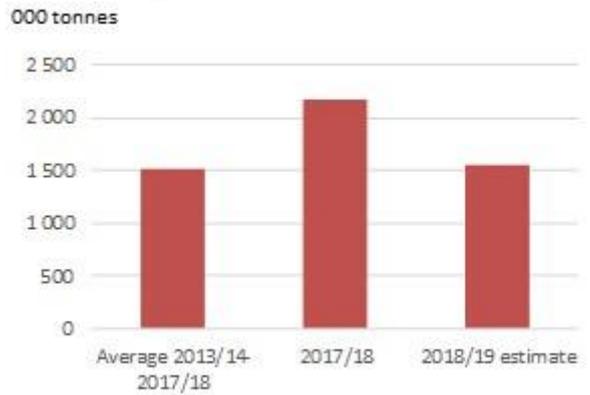
Overall, the country is food secure and has recovered from the 2017 drought episode that affected approximately 900 000 people.

In view of the enhanced likelihood of the occurrence of an El Niño event, the food security situation may deteriorate in 2019 in case of failure of the *Maha* and *Yala* crops.

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Sri Lanka

Cereals Imports

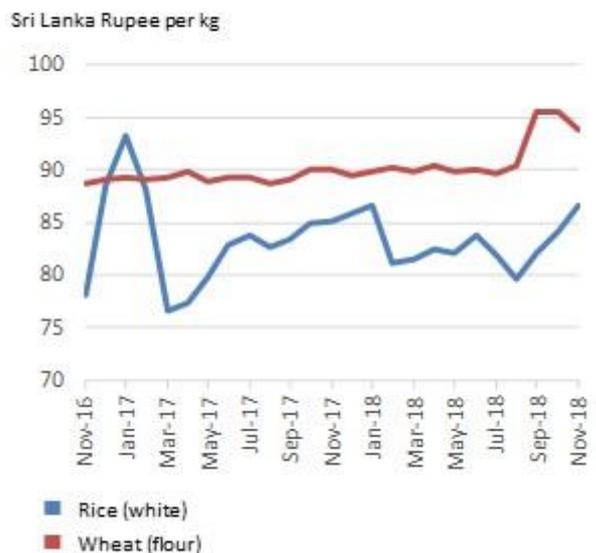


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Sri Lanka

Retail prices of rice and wheat flour in Colombo



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



GIEWS Country Brief Sri Lanka

Reference Date: 08-March-2018

FOOD SECURITY SNAPSHOT

- Main season 2018 paddy crop expected to partially recover from 2017 drought-reduced output
- Cereal output in 2017 decreased significantly due to severe drought
- Cereal import requirements forecast to remain high in 2018
- Prices of rice decreased in February, while those of wheat stable

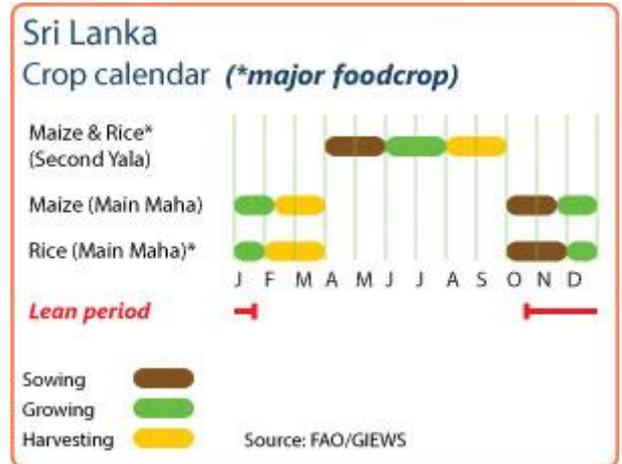
Main season 2018 paddy crop expected to partially recover from 2017 drought-reduced output

Harvesting of the 2018 main *maha* paddy crop, accounting for about 65 percent of the annual production, began in mid-January and is expected to continue until the end of March. Below-average rains throughout October 2017, coupled with low water levels in major reservoirs, constrained sowing operations. Rains improved from mid-January, benefitting the development of the crops already on the ground. Official information from January 2017 indicates that, while the planting progress for the 2018 main paddy crop surpassed last year's drought-reduced level, it lagged behind normal years. As a result, the 2018 main season paddy output is expected to partially recover from last year's severely reduced level but still be below average.

Aggregate cereal output in 2017 decreased significantly due to severe drought

Latest official estimates put the 2017 aggregate rice output at 2.5 million tonnes (1.7 million tonnes, milled basis), 43 percent less than the output in 2016 and 41 percent lower than the average of the previous five years. The decrease is the result of a severe drought at the end of 2016 and early 2017, which compromised water availabilities for irrigation for the 2017 main *maha* and secondary *yala* season crops, resulting in a considerable decrease in plantings, widespread crop losses and reduced yields.

Other cereals, including maize, various pulses, chillies and onions, mainly grown under rainfed conditions, were also heavily damaged by the dry weather.



Sri Lanka
Cereal production

	2012-2016 average	2016	2017 estimate	change 2017/2016
	000 tonnes			percent
Rice (paddy)	4,217	4,420	2,499	-43
Maize	242	291	190	-35
Millet	7	7	7	0
Others	0	0	0	0
Total	4,466	4,718	2,696	-43

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

Cereal import requirements in 2018 forecast to remain at high level

The cereal import requirements in 2018 are forecast at about 1.6 million tonnes, 13 percent below last year's high level, but well above the five-year average. It comprises about 1 million tonnes of wheat and 100 000 tonnes of maize. For rice, the import requirements in 2018 are preliminarily forecast at about 500 000 tonnes, 33 percent below last year's exceptionally high level, but still well above the five-year average, given the expectations of the continuing supply tightness following last year's sharply reduced output.

Prices of rice decreased in February, while those of wheat stable

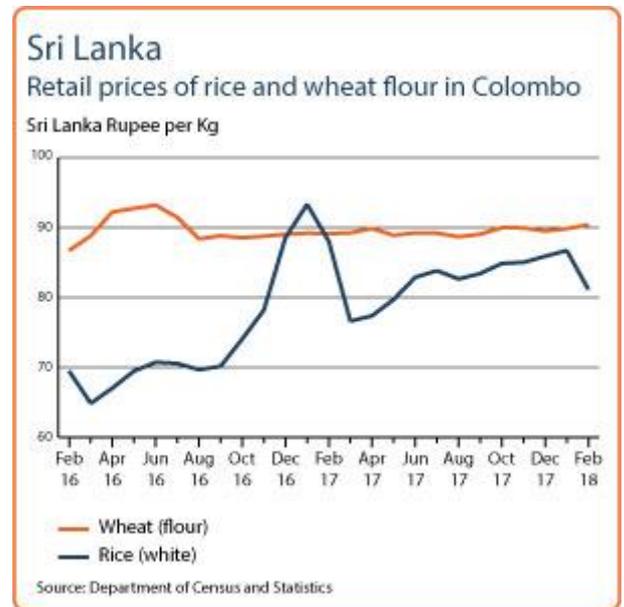
In February, domestic prices of rice decreased with the onset of the 2018 main *maha* harvest. Overall, prices were below their year earlier levels. Wheat prices remained overall stable in recent months and, in February, were close to the same period last year reflecting adequate imports.

Large numbers of people affected by severe weather conditions in 2017

According to the FAO/WFP Crop and Food Security Assessment Mission report, released in June 2017, the prolonged drought in the first part of 2017 has impacted the food consumption scores of the households in the affected areas, with approximately 900 000 people estimated to face food insecurity, mostly concentrated in the districts of Kurunegala, Moneragale, Vavuniya, Mannar and Jaffna. In addition, over 630 000 people were affected by floods in May 2017 mostly in the districts of Kalutara, Matara and Galle and Ratnapura.

A below-average 2018 main season paddy output is expected to affect food security conditions of large numbers of people, due to loss of income and reduced purchasing power resulting from the reduced production of paddy for sale and poor agricultural labour opportunities.

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GIEWS Country Brief Sri Lanka

Reference Date: 26-January-2018

FOOD SECURITY SNAPSHOT

- Main season 2018 paddy crop expected to partially recover from 2017 drought-reduced output
- Cereal output in 2017 decreased significantly due to severe drought
- Cereal import requirements forecast to remain high in 2018
- Prices of rice on increase and at high levels, while those of wheat stable

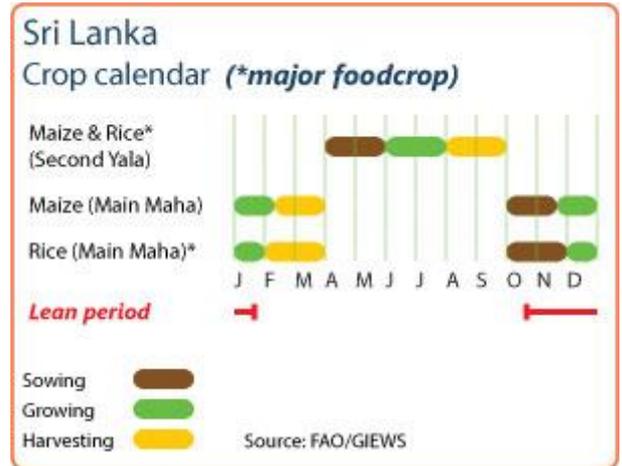
Main season 2018 paddy crop expected to partially recover from 2017 drought-reduced output

Harvesting of the 2018 main season *maha* paddy crop, accounting for about 65 percent of the annual production, began in mid-January, with the bulk to be collected between February and March. Below-average rains throughout October 2017, coupled with low water levels in major reservoirs, delayed sowing operations in North Central, North Western, Central and Uwa provinces. Official information from mid-December 2017 indicated that, while planting progress for the 2018 main season surpassed last year's drought-reduced level, it lagged well behind normal years. As a result, the 2018 main season paddy output is expected to partially recover from last year's severely reduced level but still be below average.

Aggregate cereal output in 2017 decreased significantly due to severe drought

Latest official estimates put the 2017 aggregate rice output at 2.5 million tonnes (1.7 million tonnes, milled basis), 43 percent less than the output in 2016 and 41 percent lower than the average of the previous five years. The decrease is the result of a severe drought at the end of 2016 and early 2017, which compromised water availabilities for irrigation for the 2017 main *maha* and secondary *yala* season crops, resulting in a considerable decrease in plantings, widespread crop losses and reduced yields.

Other cereals, including maize, various pulses, chillies and onions, mainly grown under rainfed conditions, were also heavily damaged by the dry weather.



Sri Lanka
Cereal production

	2012-2016 average	2016	2017 estimate	change 2017/2016
	000 tonnes			percent
Rice (paddy)	4,217	4,420	2,499	-43
Maize	242	291	190	-35
Millet	7	7	7	0
Others	0	0	0	0
Total	4,466	4,718	2,696	-43

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

Cereal import requirements in 2018 forecast to remain at high level

The cereal import requirements in 2018 are forecast at about 1.6 million tonnes, 13 percent below last year's high level but remain well-above the five-year average. It comprises about 1 million tonnes of wheat and 100 000 tonnes of maize. For rice, the import requirements in 2018 are preliminarily forecast at about 500 000 tonnes, slightly below last year's exceptionally high level, but still well above the five-year average, given the expectations of the continuing supply tightness following last year's sharply reduced output.

Prices of rice on increase and high, while those of wheat stable

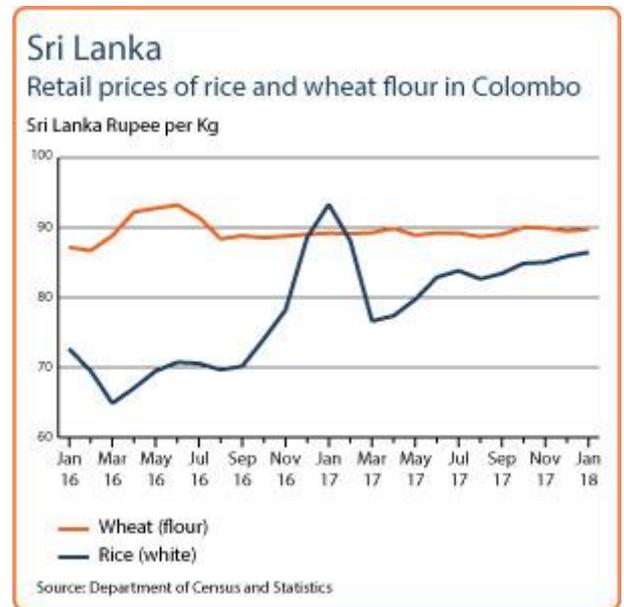
In January, domestic prices of rice continued the upward trend of the previous months and were well above their year-earlier levels as market supplies were generally tight following the sharp reduction in the 2017 output. Wheat prices remained overall stable in recent months reflecting adequate market availabilities following high level of imports.

Large numbers of people affected by severe weather conditions in 2017

According to the FAO/WFP Crop and Food Security Assessment Mission report, released in June 2017, the prolonged drought in the first part of 2017 has impacted the food consumption scores of households in the affected areas, with approximately 900 000 people estimated to face food insecurity, mostly concentrated in the districts of Kurunegala, Moneragale, Vavuniya, Mannar and Jaffna. In addition, over 630 000 people were affected by floods in May 2017 mostly in the districts of Kalutara, Matara and Galle and Ratnapura.

A below-average 2018 main season paddy output is expected to affect food security conditions of large numbers of people, due to loss of income and reduced purchasing power, resulting from the reduced production of paddy for sale and poor agricultural labour opportunities. In addition, the persistent high prices for rice, the country's main staple, continue to negatively affect the access to food of the most vulnerable households.

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GIEWS Country Brief Sri Lanka

Reference Date: 27-June-2017

FOOD SECURITY SNAPSHOT

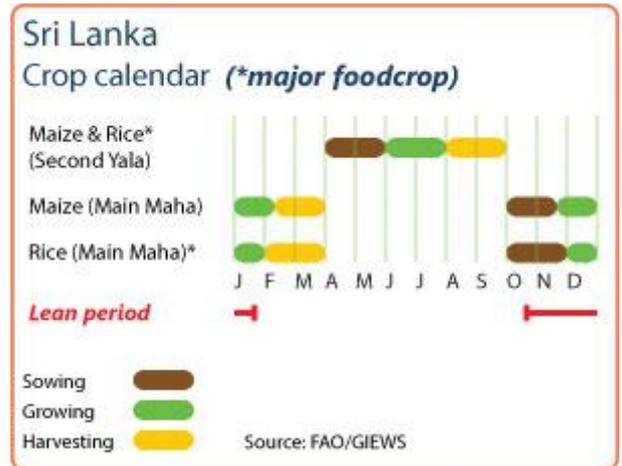
- Cereal output in 2017 forecast to decrease significantly as result of severe drought in 2016 and early 2017
- Rice import requirements forecast to increase considerably in 2017 on reduced output
- Prices of rice increased in recent months and at high levels in June
- Drought negatively impacted livelihoods and food security of affected households

Cereal output in 2017 forecast to decrease significantly due to severe drought

According to the joint FAO/WFP Crop and Food Security Assessment Mission (CFSAM) report, released on 22 June the 2017 aggregate rice output, the country's main staple, is forecast at 2.7 million tonnes, almost 40 percent less than last year's output and 35 percent lower than the average of the previous five years. The decrease is the result of a severe drought at end-2016 and early 2017, which compromised water availabilities for irrigation for the 2016/17 main *maha* season crops, resulting in a considerable decrease in plantings, widespread crop losses and sharply reduced yields. Paddy cultivations in rainfed areas and minor irrigation schemes, largely dependent on precipitations, were the most affected. Prospects for the 2017 secondary *yala* season paddy, due to be harvested in August and September, are also unfavourable mostly due to tight water supply situation in the key-producing areas and reported shortages of paddy seeds. Heavy rains in the second part of May caused localized floods and landslides, especially in southwestern parts of the country. Although these rains brought some relief to drought-affected areas in the southwest, severe water supply constraints remained in the main rice-producing districts located in the northcentral and eastern parts of the country.

Other cereals, including maize, various pulses, chillies and onions, mainly grown under rainfed conditions, were also heavily damaged by the dry weather.

Livestock suffered a temporary setback at the end of 2016 and the beginning of 2017, with reduced milk production due to poor pasture conditions, but have since recovered with improved rains starting February.



Sri Lanka
Cereal production

	2012-2016 average	2016	2017 forecast	change 2017/2016
	000 tonnes			percent
Rice (paddy)	4 217	4 420	2 733	-38
Maize	242	291	171	-41
Millet	7	7	5	-29
Others	0	0	0	0
Total	4 466	4 718	2 909	-38

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

Rice import requirements forecast to increase considerably in 2017 on reduced output

The cereal import requirement in 2017 is forecast at about 1.8 million tonnes. It comprises about 1 million tonnes of wheat and 100 000 tonnes of maize. For rice, the import requirements are estimated at about 700 000 tonnes for 2017. This is well above the five-year average and considerably up from a mere 30 000 tonnes imported in 2016, when ample inventories and higher duties discouraged imports. In the first four months of 2017, the country has already imported 288 038 tonnes of rice, considerably above the 9 540 tonnes imported during the corresponding period of last year. In early January, with the aim to improve market availabilities through imports, the Government replaced all charges levied on imported rice of LKR 80 (USD 0.53) per kg with a Special Commodity Levy of only LKR 15 (USD 0.1) per kg. Successive decisions further lowered this rate to LKR 5 (USD 0.03) per kg until 30 May 2017.

Prices of rice increased in recent months and at high levels in June

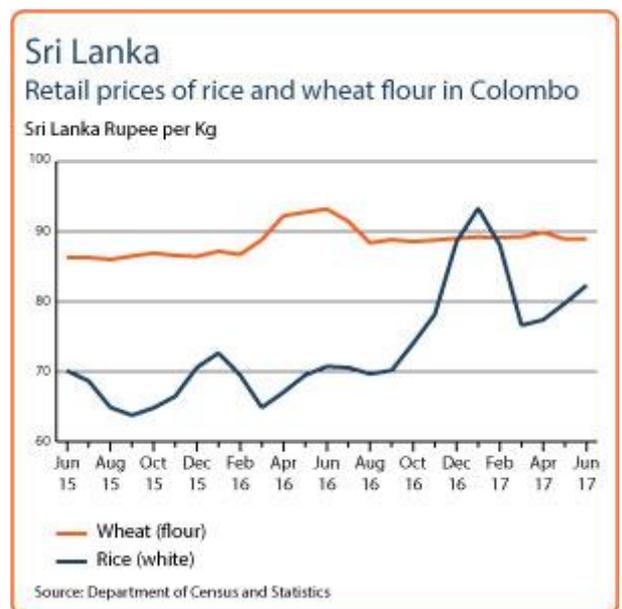
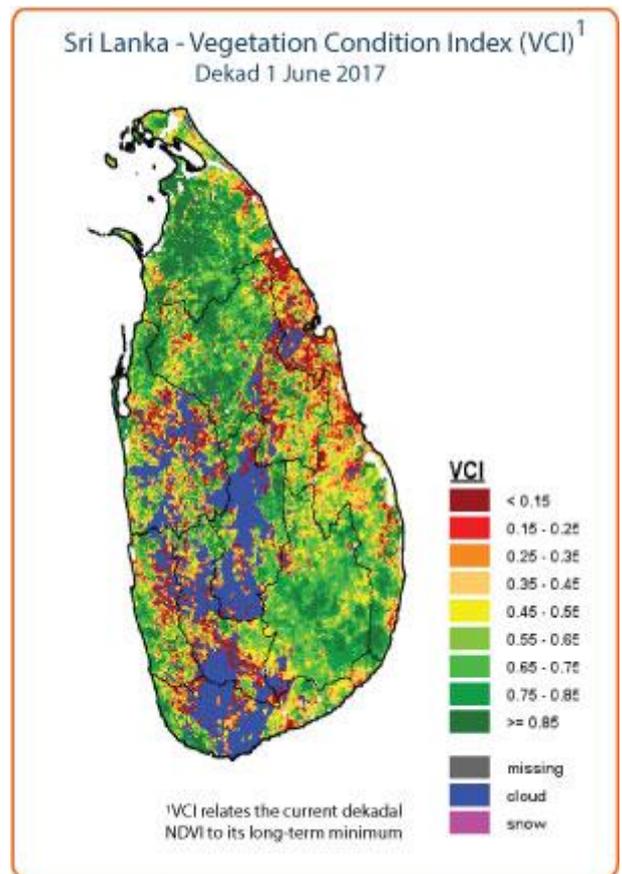
Domestic prices of rice, the main staple food in the country, increased in recent months reflecting unfavourable prospects for the 2017 secondary *ya/la* crop. Overall, quotations were around 16 percent above their year-earlier levels in the first three weeks of June after the steep increases registered in the last quarter of 2016, when seasonal tightness was compounded by expectations of a sharply drought-reduced 2017 main crop. Wheat prices remained overall stable in recent months, reflecting adequate market availabilities, following the high level of imports.

Large numbers of people affected by lingering effects of drought

According to the 2017 FAO/WFP CFSAM report, the drought has impacted food consumption scores of households in the affected areas, with approximately about 900 000 people estimated to face food insecurity, mostly concentrated in the districts of Kurunegala, Moneragala, Vavuniya, Mannar and Jaffna. The impact was mainly in form of loss of income and reduced purchasing power among the most affected households, due to reduced production of paddy for sale, poor agricultural labour opportunities and increased retail prices. Daily agricultural labourers and rainfed paddy farming households were among the livelihood groups most affected. In addition, over 630 000 people were affected by floods in May 2017 mostly in the districts of Kalutara, Matara and Galle and Ratnapura.

The 2017 FAO/WFP CFSAM report highlights the need for the timely provision of seeds and planting equipment for the 2017/18 *maha* planting season from September to December. In addition, it is recommended to assist the poorest and most vulnerable with cash assistance to prevent negative coping strategies, such as building up unsustainable high debt levels and ensuring adequate food consumption among the most vulnerable.

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GIEWS Country Brief Sri Lanka

Reference Date: 17-January-2017

FOOD SECURITY SNAPSHOT

- “Maha” cereal crop in 2017 significantly impaired by dry weather conditions
- Rice import needs forecast to increase in 2017
- Prices of rice hit record levels in December, while those of wheat remain generally stable
- Large numbers of people affected by lingering effects of drought in 2016

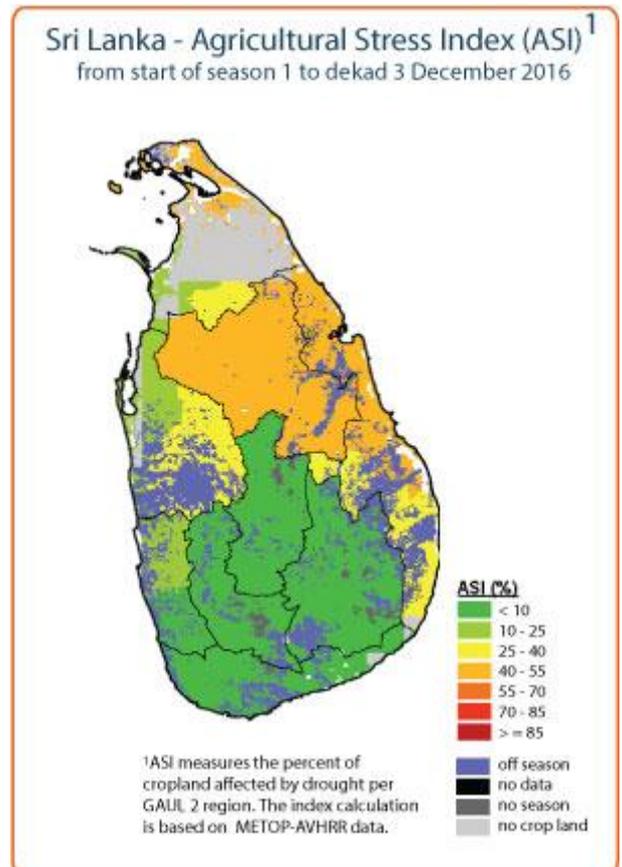
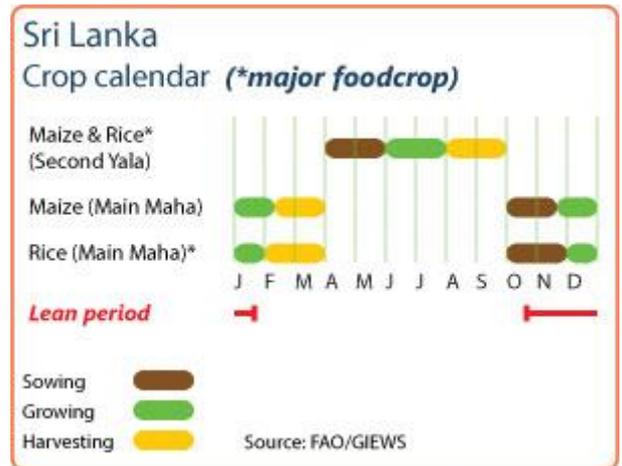
Dry weather conditions impair the 2017 “maha” cereal output significantly

The bulk of the 2017 largely irrigated “maha” rice crop, normally accounting for 65 percent of the annual production, was planted by the end of December. The below-average rainfall since the start of the season in October, coupled with low irrigation water availability, resulted in significant cuts in the area planted, further reducing yield prospects for the season. The latest official estimates of plantings indicate that, as of end-November, 327 000 hectares were put under the 2017 “maha” paddy crop, 50 percent below the area planted at the same time in 2016. The FAO’s Agricultural Stress Index (ASI) for the 3 dekad of December 2016 indicated a risk of drought conditions developing in various main rice-producing areas, including Northern, North Central and Eastern provinces. As a result, FAO’s outlook for the 2017 “maha” season paddy output is unfavourable. Given the current low water levels in main reservoirs, there is also concern for the 2017 irrigated secondary “yala” crop, to be planted from April, if rains do not improve in the coming weeks.

Prospects for the 2017 main season maize crop, to be harvested from February, are also unfavourable, due to the dry spell.

Rice import requirements forecast to increase in 2017 on expectations of reduced output

Total cereal imports requirements in 2017 are forecast to increase from last year’s already high level. The increase is mainly driven by the unfavourable prospects for the 2017 rice production. Imports of wheat, which is not produced domestically, are anticipated to remain at last year’s high level of 1.2 million tonnes, reflecting strong domestic demand.



Prices of rice hit record levels in December, while those of wheat generally stable

Domestic prices of rice, the main staple food in the country, rose considerably for four consecutive months, reaching record levels in December 2016. The spike in prices is due to the reduced 2016 secondary “yala” output, harvested in September, and the unfavourable prospects for the main 2017 “maha” crop. In an attempt to ease rice prices, the Government began releasing paddy from public stocks to millers in late December. In addition, the Government plans to import rice and reduce duties and taxes on imported rice in early January 2017. Wheat prices remained overall stable, reflecting adequate market availabilities, following the high level of imports in recent months.

Concerns remain for vulnerable rural groups

Food security conditions are expected to deteriorate on expectations of significant cereal production losses for the ongoing “maha” season, which follows a reduced “yala” harvest in 2016. Subsistence farm households, particularly in the North Western, North Central, Uva and Southern provinces, will likely be most affected and require some humanitarian and emergency recovery assistance. According to the Disaster Management Centre, almost 1 million people in 23 out of 25 districts have been negatively affected by drought conditions. Record prices of rice negatively affect food access and further stress the food security situation of the most vulnerable populations.

Sri Lanka

Cereal production

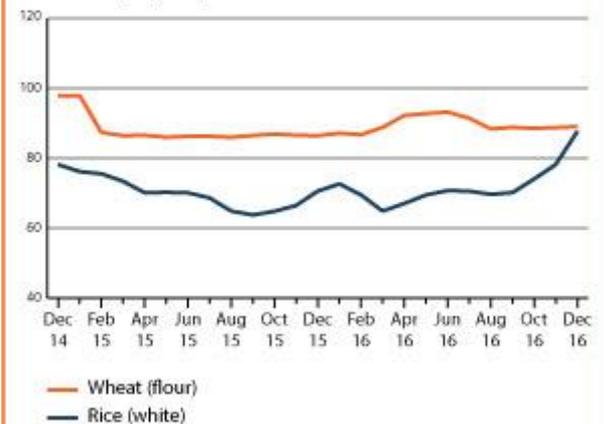
	2011-2015 average	2015	2016 estimate	change 2016/2015
	000 tonnes			percent
Rice (paddy)	4 112	4 819	4 474	-7
Maize	221	265	291	10
Millet	7	7	7	0
Others	0	0	0	0
Total	4 340	5 091	4 772	-6

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

Sri Lanka

Retail prices of rice and wheat flour in Colombo

Sri Lanka Rupee per Kg



Source: Department of Census and Statistics



GIEWS Country Brief Sri Lanka

Reference Date: 22-September-2016

FOOD SECURITY SNAPSHOT

- Paddy production to decline in 2016
- Rice imports forecast to fall in 2016
- Rice and wheat prices declined in recent months
- Floods in May affected large numbers of people

Paddy production to decline in 2016

Harvesting of the 2016 secondary “yala” paddy crop, which accounts for 35 percent of the annual production, is nearing completion. The latest official estimate puts the 2016 “yala” paddy output at 1.6 million tonnes, 19 percent below last year’s record level. The sharp reduction reflects a contraction in the area sown, due to unfavourable weather conditions in the main producing areas. The 2016 main “maha” crop, which was harvested in March, is officially estimated at a record level of 2.9 million tonnes, mostly due to higher plantings. Overall, the aggregate paddy production in 2016 is estimated at 4.5 million tonnes, 7 percent below last year’s record level, but still 9 percent above the five-year average.

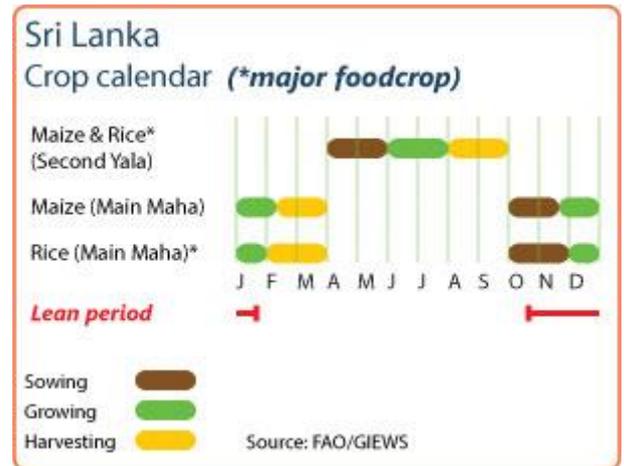
The 2016 aggregate maize output is estimated by FAO at 280 000 tonnes, up 6 percent from the 2015 record, reflecting an increase of both area planted and yields.

Rice imports forecast to fall in 2016

Total cereal imports in 2016 are forecast at 1.3 million tonnes, down 17 percent from last year’s high level. The decrease is the result of lower rice imports, which are forecast to return to an about-normal level of 30 000 tonnes after the high levels in the previous two years. Despite a lower output in 2016, it is estimated that the country holds sufficient stocks to meet consumption needs, following the record harvest and high imports in 2015. Imports of wheat, which is not produced domestically, are anticipated to remain at last year’s high level of 1.2 million tonnes, reflecting strong domestic demand.

Rice and wheat prices declined in recent months

After gradual increases between April and June, rice prices declined since July, reflecting improved availabilities in the market following the release of Government stocks and new supplies from the 2016 “yala” harvest. Similarly, wheat prices decreased in recent months, on account of a high level of imports.



Sri Lanka
Cereal production

	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Rice (paddy)	4 112	4 819	4 468	-7
Maize	221	265	280	6
Millet	7	7	7	0
Others	0	0	0	0
Total	4 340	5 091	4 755	-7

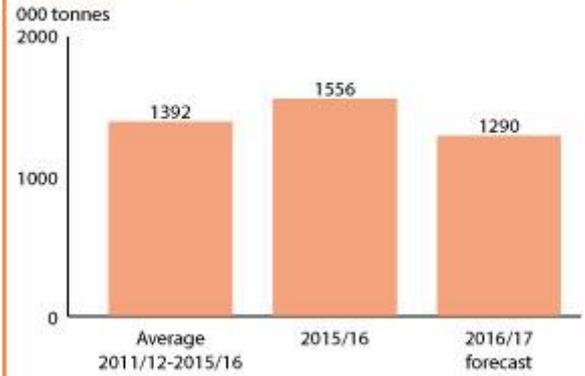
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Floods in May 2016 affected large numbers of people

According to official estimates, floods in mid-May adversely affected at least 300 000 people, mainly in the Northern, Western and Sabaragamuwa provinces of the country. In these areas, paddy output is expected to decrease, negatively impacting on livelihoods of affected households.

Sri Lanka

Total cereal imports



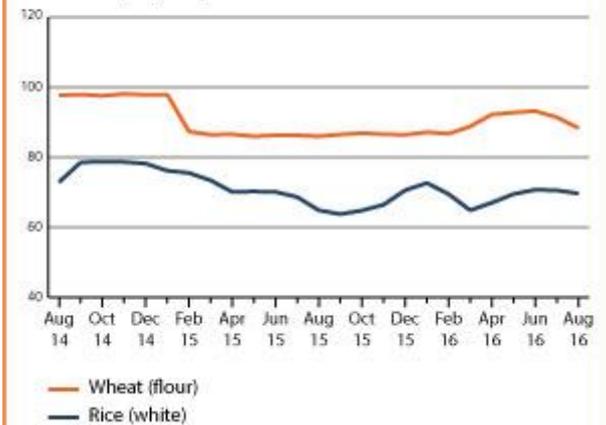
Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.

Source: FAO/GIEWS Country Cereal Balance Sheets

Sri Lanka

Retail prices of rice and wheat flour in Colombo

Sri Lanka Rupee per Kg



Source: Department of Census and Statistics



GIEWS Country Brief Sri Lanka

Reference Date: 20-July-2016

FOOD SECURITY SNAPSHOT

- Unfavourable weather hampered planting of 2016 secondary season paddy
- Rice imports forecast to fall in 2016
- Rice prices stable, those of wheat flour increasing
- Floods in May affected large numbers of people

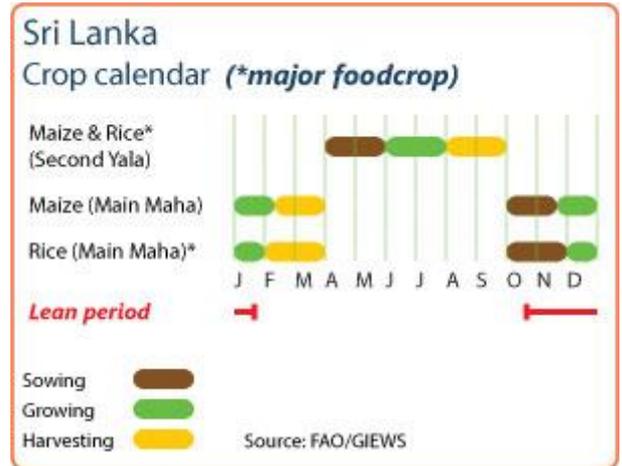
Unfavourable weather hampered planting of 2016 secondary paddy crop

The 2016 secondary *Yala* paddy crop, which accounts for 40 percent of the annual production, is normally sown between April and May. Planting activities this season were hampered by dry weather in April and by flooding in mid-May, during the passage of the tropical storm Roanua. Floods mostly affected the districts of Batticaloa (Eastern Province), Anuradhapura (North-Central Province), Kurunagala (North-Western Province) and Monaragala (Uva Province), which together normally account for close to one-third of the *Yala* output. Official reports indicate that as of the end of June, some 380 000 hectares had been planted, 20 percent less than at the same time last year. Reflecting this, and pending the final official area planted estimates, FAO has lowered its preliminary 2016 production forecast for the *Yala* crop to 1.5 million tonnes, 21 percent below last year's record level. The 2016 main *Maha* crop, which was harvested earlier in the year, is officially estimated at a record level of 3 million tonnes, 3 percent above the 2015 level, mostly due to higher plantings. Overall, based on the estimates for the already-harvested *Maha* crops and the early outlook for the ongoing *Yala* season, FAO forecasts aggregate paddy production in 2016 at 4.5 million tonnes. This would be 7 percent below last year's record level, but still 9 percent above the five-year average.

Latest official estimates put the 2016 main season *Maha* maize crop, harvested in mid-April, at 243 356 tonnes, up 5 percent from the 2015 bumper *Maha* harvest, largely reflecting an expansion in plantings. The damage from Roanua to the 2016 secondary *Yala* maize crop was minimal. Considering the already harvested *Maha* crop and assuming an average *Yala* output, FAO tentatively forecasts the 2016 aggregate maize production at 280 000 tonnes, 5 percent above the 2014 bumper output.

Rice imports forecast to fall in 2016

Total cereal imports in 2016 are forecast at 1.3 million tonnes, down 17 percent from last year's high level. The decrease is the



Sri Lanka
Cereal production

	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Rice (paddy)	4,112	4,819	4,500	-7
Maize	221	265	280	6
Millet	7	7	7	0
Others	0	0	0	0
Total	4,340	5,091	4,787	-6

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

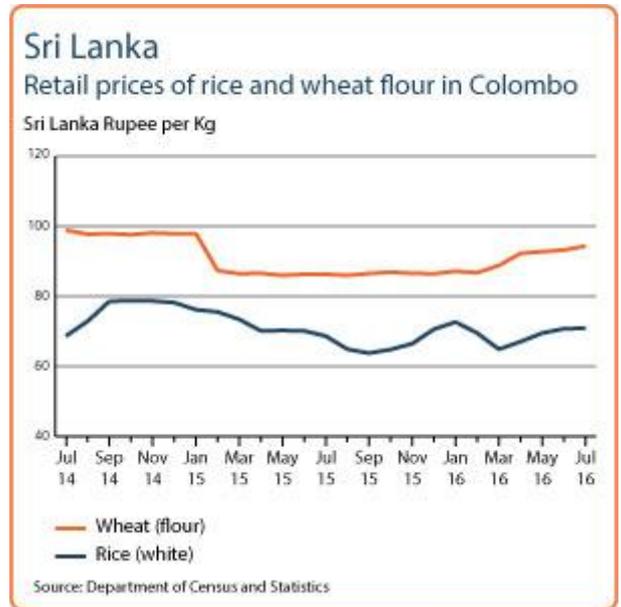
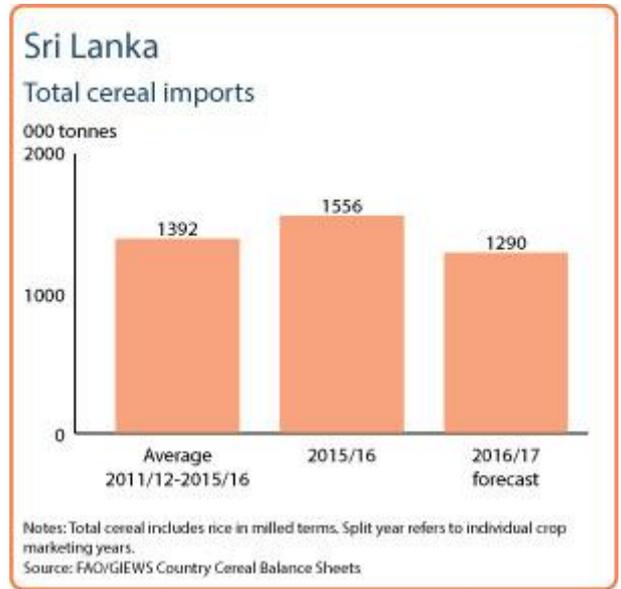
result of lower rice imports, of which the area is forecast to return to an about-normal level of 30 000 tonnes after the high levels of the previous two years. Despite the prospects of lower output in 2016, it is estimated that the country holds sufficient stocks to meet consumption needs, following the record harvest and high imports in 2015. Imports of wheat, which is not produced domestically, are anticipated to remain at last year's high level of 1.2 million tonnes, reflecting strong domestic demand.

Rice prices stable, while those of wheat flour increasing

After gradual increases between April and June, rice prices stabilized in early July, ahead of the *Yala* harvest and reflecting improved availabilities in the market following the release of Government stocks. In mid-July, the Government announced plans to release an additional 200 000 tonnes of rice, with the aim to prevent increases in rice prices. Prices of mostly imported wheat flour have been gradually increasing since March 2016, reflecting the raising of the import duty on wheat.

Floods in May 2016 affected large numbers of people

According to official estimates, floods in mid-May adversely affected at least 300 000 people, mainly in the Northern, Western and Sabaragamuwa provinces of the country. In these areas, paddy output is expected to decrease as a result of area contractions due to the flooding but also earlier dryness.



Reference Date: 11-May-2015

FOOD SECURITY SNAPSHOT

- Aggregate rice production in 2015 forecast to recover from last year's drought-reduced level
- Rice imports forecast to return to average levels in 2015
- Rice prices decreasing, those of wheat flour stable
- Floods in late 2014 affected food availability in localized areas

Aggregate rice production in 2015 forecast to recover from last year's drought-reduced level

Harvesting of the 2015 mostly irrigated main season "Maha" rice crop, accounting for about 65 percent of annual production, was completed in April. FAO estimates the 2015 "Maha" season paddy output at 2.7 million tonnes, a recovery of 19 percent from the drought-reduced level of 2014. This is the result of a recovery in planted area and adequate supply of irrigation water. Assuming favourable weather conditions during the 2015 secondary "Yala" season, currently being planted, FAO forecasts the 2015 aggregate rice production to rebound by 21 percent to 4.1 million tonnes.

Latest official estimates put the 2015 main season "Maha" maize crop, harvested in mid-April, at 277 336 tonnes, up 29 percent from the 2014 same season level. The projected increase is the result of a 44 percent expansion in the area planted which is expected to more than compensate for a decrease in yields, following floods in November and December. Assuming an average 2015 "Yala" secondary crop, which is currently being planted, FAO tentatively forecasts the 2015 aggregate maize production at 300 000 tonnes, 15 percent above the 2014 bumper output.

Rice imports forecast to return to average levels in 2015

Rice imports in the 2015 marketing year (January/December) are forecast at 150 000 tonnes, a considerable (75 percent) decrease from last year's high level on account of the expected recovery in this year's rice production. Imports of wheat, which is not produced domestically, are set to remain at around last year's level at 1.1 million tonnes.

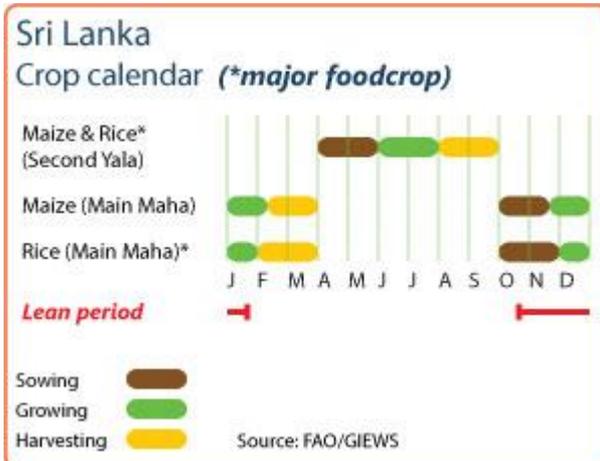
Rice prices decreasing, while those of wheat flour stable

Rice prices continued their downward trend in April, pressured by ample supplies from the 2014/15 main season harvest. Increased rice imports in the previous months also contributed to the decline in prices.

Wheat flour prices, which are regulated, were generally stable and marginally up from a year earlier.

Floods in late 2014 affected food availability in localized areas

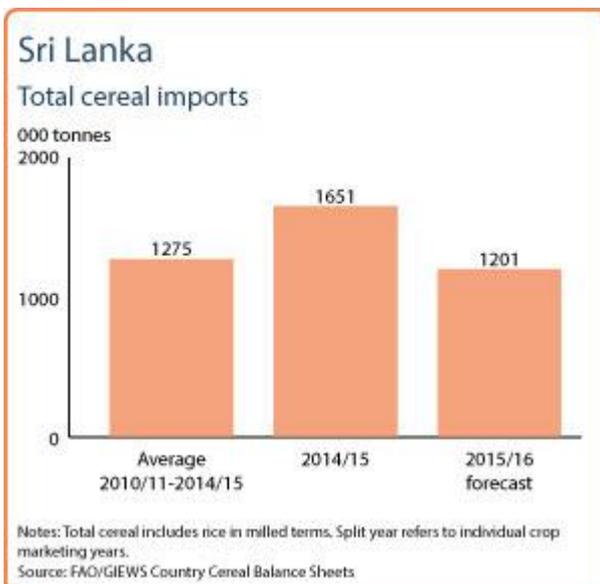
According to official estimates, floods in November and December adversely affected at least 1.1 million people, mainly in the Northern and Eastern provinces of the country. The flooding resulted in



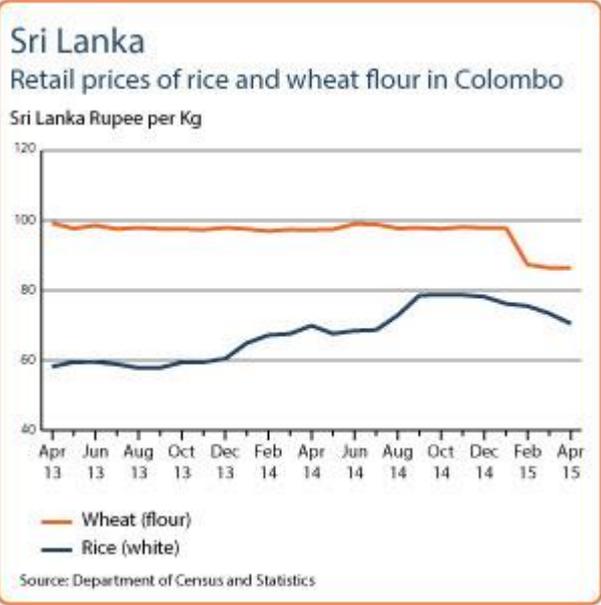
Sri Lanka Cereal production

	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes			percent
Rice (paddy)	4 009	3 381	4 100	21
Maize	203	261	300	15
Millet	7	7	7	0
Others	0	0	0	0
Total	4 219	3 649	4 407	21

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



significant crop losses in these areas. The Government of Sri Lanka allocated LKR 500 million (USD 3.8 million) to the Ministry of Disaster Management to provide relief to the flood-affected people.



Reference Date: 17-February-2015

FOOD SECURITY SNAPSHOT

- 2015 main season “Maha” rice crop forecast to recover from last year’s drought-reduced level
- Considerably higher rice imports estimates for 2014
- Rice prices remain at near-record levels, while those of wheat are stable
- Recent floods affected food availability in localized areas

2015 main season “Maha” rice crop forecast to recover from last year’s drought-reduced output

Harvesting of the 2015 mostly irrigated main season “Maha” rice crop, accounting for about 65 percent of annual production, started in mid-January, with the bulk to be collected between February and March. Favourable rainfall from October to January over the eastern, central and northwestern major rice growing areas benefitted planting operations and replenished irrigation water in the reservoirs. However, heavy rains in late November and December caused localized flooding in key rice producing areas in the Northern and Eastern provinces of the country. Preliminary official estimates indicate losses of 410 246 tonnes of paddy rice, particularly in Batticaloa, Trincomalee and Polonnaruwa districts. Considering the estimated flood damage and assuming near-average yields, FAO forecasts the 2015 “Maha” season paddy output at 2.7 million tonnes, up 19 percent from the drought-reduced 2014 “Maha” crop season.

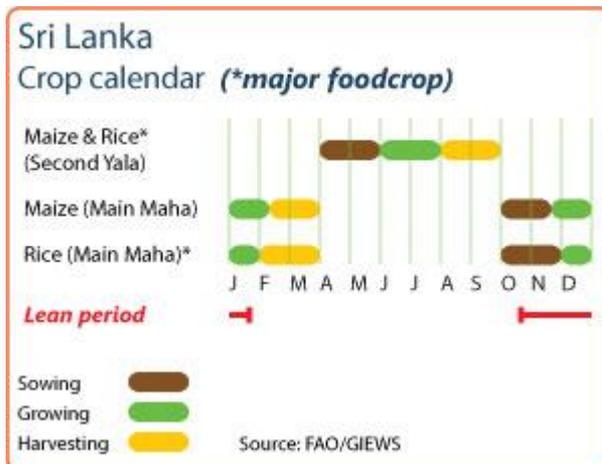
Harvesting of the 2015 main season “Maha” maize crop, is currently ongoing and will continue until the end of March. Latest official forecasts put the 2015 main season “Maha” maize production at 271 091 tonnes, up 21 percent from the 2013 same season level. The projected increase is the result of a 40 percent expansion in the area planted which is expected to more than compensate for a small decrease in yields, following recent floods. Assuming an average forthcoming 2015 “Yala” secondary crop, FAO tentatively forecasts the 2015 aggregate maize production at 300 000 tonnes, 15 percent above the 2014 bumper output.

2014 rice output dropped considerably following prolonged dry weather

The 2014 aggregate rice production, including the 2014 main “Maha” (harvested by April 2014) and secondary “Yala” (harvested by September 2014) seasons, is officially estimated at 3.5 million tonnes, some 25 percent lower than the 2013 record output and 14 percent below the previous five-year average. The sharp reduction is the result of an overall 20 percent contraction in plantings, as well as lower yields, following prolonged periods of dry weather during the cropping seasons.

Considerably higher rice imports estimated for 2014

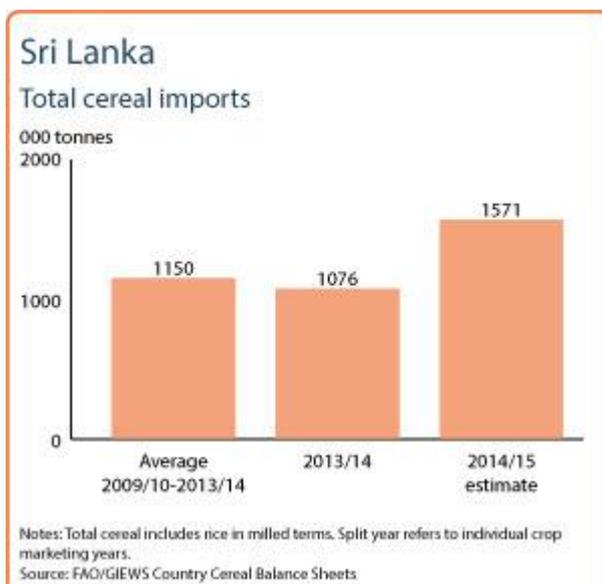
The 2014 rice imports, which are normally imported in minor quantities, have been revised upwards and are now estimated at 520 000 tonnes from 22 900 tonnes in 2013, mainly as a result of a reduced rice



Sri Lanka
Cereal production

	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes			percent
Rice (paddy)	4 028	3 477	4 100	18
Maize	203	261	300	15
Millet	7	7	7	0
Others	0	0	0	0
Total	4 238	3 745	4 407	18

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



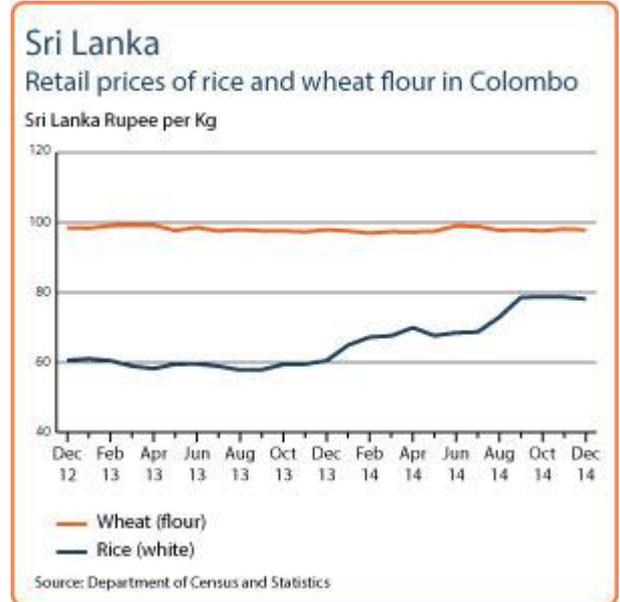
production in 2014. Anticipating a recovery in this year's rice production, 2015 rice imports are forecast to decrease from the 2014 high level but still remain well above the 2009-2013 average. Imports of wheat, which is not produced domestically, are set to remain around last year's level at 1.1 million tonnes.

Rice prices were stable in December, but at near-record highs

After sharp increases in previous months rice prices were stable in December, but at near-record highs, as a result of reduced production in 2014. Prices of rice are expected to decrease in February, with the recent Government's release of 100 000 tonnes of imported rice stocks into the market and the 2015 main "Maha" season harvest in February/March. Wheat flour prices, which are regulated, were generally stable and marginally up from a year earlier.

Recent floods affected food availability in localized areas

According to official estimates, recent floods in November and December adversely affected at least 1.1 million people, mainly in the Northern and Eastern provinces of the country. The flooding resulted in significant crop losses in these areas. The Government of Sri Lanka has allocated LKR 500 million (USD 3.8 million) to the Ministry of Disaster Management to provide relief to the flood affected people.



Reference Date: 04-November-2014

FOOD SECURITY SNAPSHOT

- 2014 paddy production decreased due to prolonged dry weather
- Cereal imports in 2014 marketing year forecast to increase
- Rice prices remain at record levels, while those of wheat are stable
- Overall food security situation has improved but localized food insecurity persists

2014 rice output decreased due to prolonged dry weather

Harvesting of the 2014 second season “yala” rice crop, accounting for about 35 percent of the annual production, was completed in September. The 2014 “yala” rice output is officially estimated at 1.2 million tonnes, 30 percent below last year’s record level. The sharp reduction is the result of a 29 percent contraction in area planted, following a prolonged period of dry weather at the start of the cropping season, particularly in the key north-central and eastern producing areas, as well as further crop damage due to floods in June and pest attacks. Considering the drought-reduced 2014 main season “maha”, harvested earlier in the year, the 2014 aggregate rice production is officially estimated at 3.6 million tonnes, some 22 percent lower than the 2013 record output and 12 percent below the previous five-year average.

Latest official estimates put the 2014 aggregate maize production (including the 2014 “maha” and “yala” seasons) at 247 394 tonnes, 19 percent up from the 2013 record level. This is the result of a 20 percent expansion in the total area planted, that more than compensated for a small decrease in yields, on account of the dry spell.

Planting of the 2015 main season “maha” rice and maize crop, is currently underway. Rainfall has been favourable over the main producing areas, benefitting planting operations and early crop development.

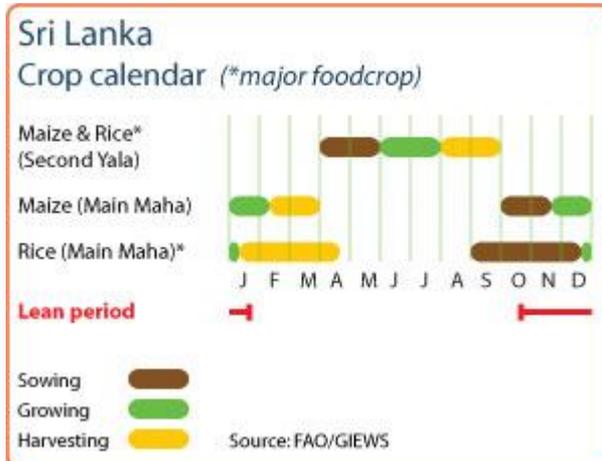
Cereal imports in 2014 marketing year (January/December) forecast to increase

Imports of wheat, which is not produced domestically, are forecast to remain around last year’s level at 1.1 million tonnes. Rice imports, which are normally imported in minor quantities, are expected to increase considerably to 200 000 tonnes in 2014 from 22 900 tonnes in 2013 following the reduced rice production.

Rice prices at record levels, while those of wheat are stable

Rice prices increased marginally in October and reached record highs, about 33 percent above their year-earlier levels. The higher prices were underpinned by a sharp contraction in this year’s paddy production. By contrast, wheat flour quotations, which are normally regulated, remained generally unchanged and close to their year-earlier levels.

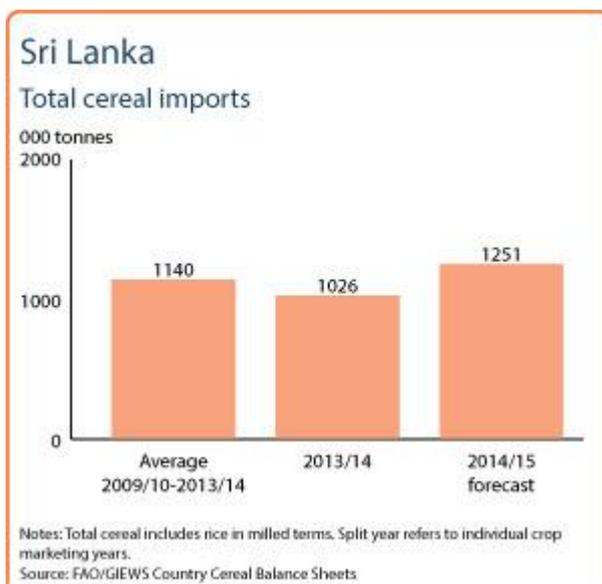
In an attempt to avert rice shortages and stabilize prices, the



Sri Lanka Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes		percent	
Rice (paddy)	4,063	4,621	3,590	-22
Maize	177	208	247	19
Millet	7	7	7	0
Others	0	0	0	0
Total	4,247	4,836	3,844	-21

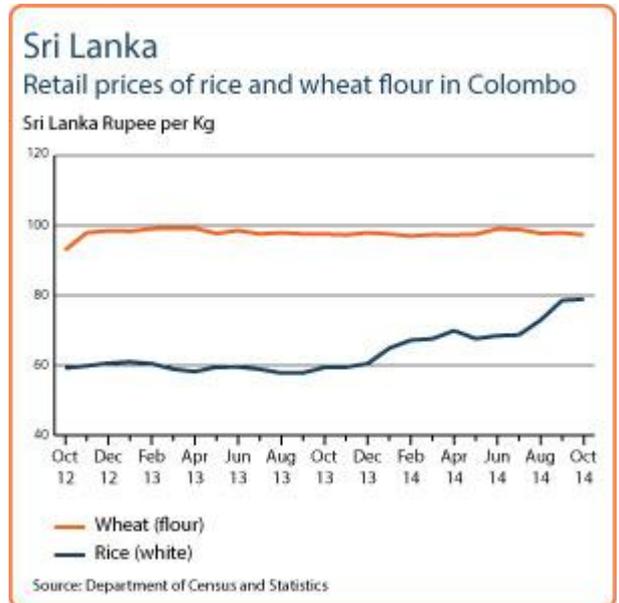
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Government has introduced a Mobile Rice Supply System by using the state-owned Lanka Sathosa trucks to sell rice at controlled prices. White raw rice is sold at LKR 64 (USD 0.49) per kg, white samba rice at LKR 76 (USD 0.58) per kg and white Nadu at LKR 67 (USD 0.51) per kg, below market prices. Subsidized rice will also be sold at the Lanka Sathosa outlets network currently being renovated.

Overall food security situation has improved but localized food insecurity persists

The food security situation has improved since 2009 after the end of the 25-year old conflict between the Liberation Tigers of Tamil Eelam (LTTE) and the Government forces in 2009. Most of the IDP camps are now closed but based on Government statistics compiled by UNHCR, still some 820 882 people are estimated to be displaced as of early 2014, living mostly with host families. The increase in rice prices, the main staple in the country, is also hampering access to food for large numbers of the low-income population.



Reference Date: 02-October-2014

FOOD SECURITY SNAPSHOT

- The 2014 paddy crop decreased due to prolonged dry weather
- Cereal imports in the 2014 marketing year (January/December) forecast to increase
- Rice prices remain at record levels, while those of wheat are stable
- Overall food security situation has improved but localized food insecurity persists

The 2014 rice output decreased due to prolonged dry weather

Harvesting of the 2014 second season (*Yala*) rice and maize crops was completed in September. The 2014 *Yala* rice output, accounting for about 35 percent of the annual production, is officially estimated at 1.2 million tonnes, 30 percent below last year's record level of the same season. The sharp reduction is mainly the result of a 29 percent contraction in area planted, following a prolonged period of dry weather at the start of the cropping season, particularly in the key north-central and eastern producing areas.

Due to the drought-reduced 2014 main season (*Maha*), harvested earlier in the year, the 2014 aggregate rice production is officially estimated at 3.6 million tonnes, some 22 percent lower than the 2013 record output and 12 percent below the previous five-year average.

Latest official estimates put the 2014 aggregate maize production (including the 2014 *Maha* and *Yala* seasons) at 244 213 tonnes, 2 percent down from the 2013 record level. A 20 percent expansion in the total area planted partially offset the damages caused by dry weather, preventing a larger production decline.

Cereal imports in the 2014 marketing year (January/December) forecast to increase

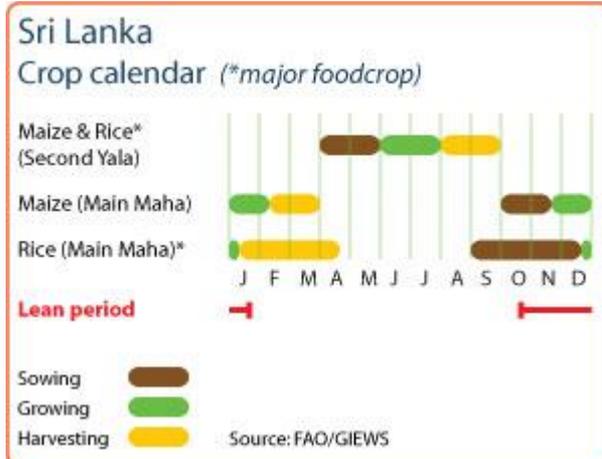
Imports of wheat, which is not produced domestically, are forecast to remain around last year's level at 1.1 million tonnes. Minor quantities of rice are also normally imported and are expected to increase considerably in 2014 following the reduced production.

Rice prices at record levels, while those of wheat are stable

Rice prices increased further in September reaching record highs and were 36 percent above their year-earlier levels. Prices were underpinned by a sharp contraction in this year's paddy production. By contrast, wheat flour quotations, which are normally regulated, remained generally unchanged and close to their year-earlier levels.

Overall food security situation has improved but localized food insecurity persists

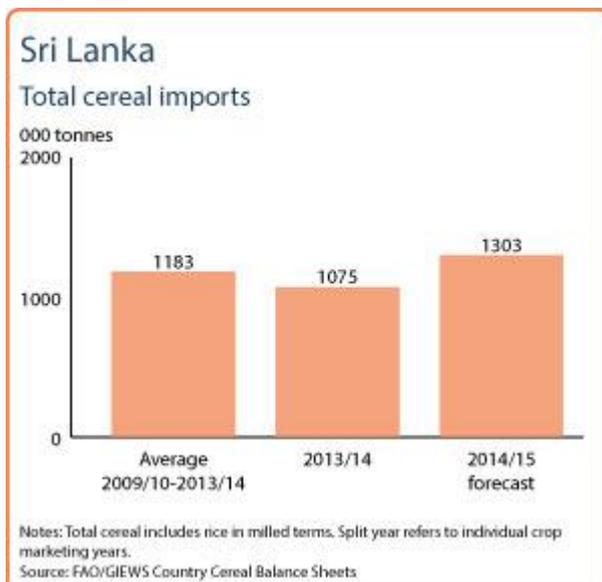
The food security situation has improved since 2009 after the end of the 25-year old conflict between the Liberation Tigers of Tamil Eelam (LTTE) and the Government forces in 2009. Most of the IDP camps are now closed but based on Government statistics compiled by UNHCR,



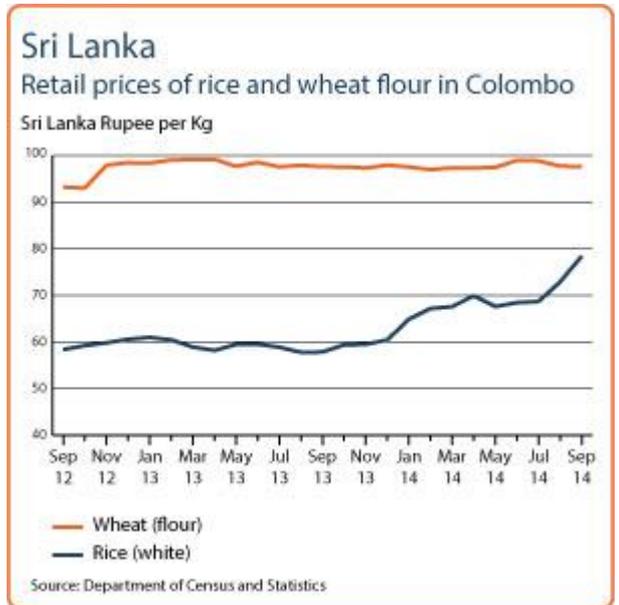
Sri Lanka Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes			percent
Rice (paddy)	4 063	4 621	3 585	-22
Maize	185	248	244	-2
Millet	7	7	7	0
Others	0	0	0	0
Total	4 255	4 876	3 836	-21

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



still some 80 216 people are estimated to be displaced as of mid-2013, living mostly with host families. The increase in rice prices, the main staple in the country, is also hampering access to food for large numbers of the low-income population.



Reference Date: 04-June-2014

FOOD SECURITY SNAPSHOT

- The 2014 *Maha* season paddy crop reduced by prolonged dry weather
- Wheat imports in the 2014 marketing year (January/December) forecast at last year's level
- Rice prices remain at near-record levels, while those of wheat stable
- Overall food security situation has improved but localized food insecurity persists

The 2014 *Maha* season rice production reduced by prolonged dry weather

Harvesting of the 2014 main season (*Maha*) rice and maize crops was completed by mid-April. The 2014 *Maha* rice output, accounting for over 60 percent of the annual production, is officially estimated at 2.4 million tonnes, 17 percent below last year's record level of the same season. The sharp reduction is mainly the result of a 15 percent contraction in area planted, following the prolonged dry weather since the beginning of the season particularly in the key northern and eastern producing areas. Early prospects for the 2014 mostly irrigated secondary *Yala* rice crop, currently being planted, are also unfavourable. This mainly reflects insufficient availability of water supplies for irrigation following the dry weather earlier in the year, which is likely to result in reduced plantings and yields. FAO tentatively forecasts the 2014 aggregate rice production (including the 2014 *Maha* and the ongoing 2014 *Yala* seasons) at 3.9 million tonnes, some 16 percent lower than the 2013 record output and 4 percent below the average level of the previous five years.

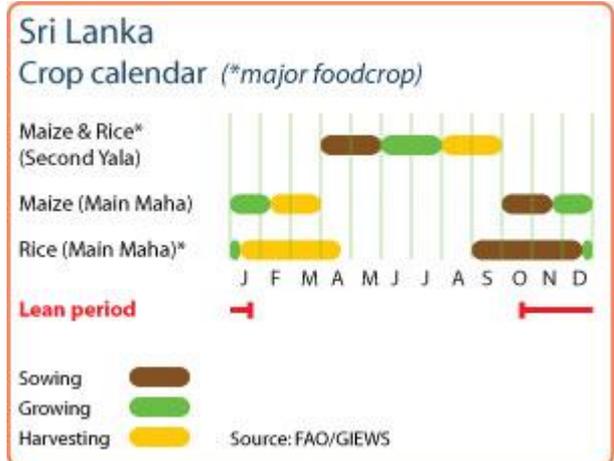
Recently revised official forecasts put the 2014 aggregate maize production (including the 2014 *Maha* and the ongoing 2014 secondary *Yala* seasons) at a record level of 256 215 tonnes, 3 percent up from the 2013 bumper level. The projected record output is mainly attributed to a 24 percent expansion in the area planted in the *Maha* season, which more than offset the damages due to the dry weather.

Wheat imports in the 2014 marketing year (January/December) forecast at last year's level

Imports of wheat, which is not produced domestically, are forecast to remain around last year's level at 1.1 million tonnes. Minor quantities of rice imports are also normally imported and are expected to increase in 2014 following the reduced production.

Rice prices remain at near-record levels, while those of wheat are stable

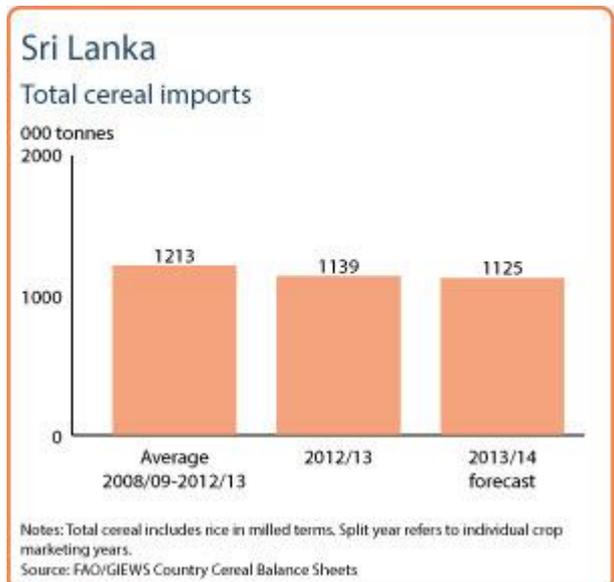
Rice prices decreased slightly in May but remained at considerably higher levels compared to the same month last year. This reflects a reduced 2014 main season *Maha* paddy output and unfavourable prospects for the 2014 secondary season harvest. In the capital city market, the retail prices of rice were at levels 15 percent higher than a year earlier. Prices of wheat flour, which are normally regulated, have remained stable in recent months and were slightly lower than their year earlier levels.



Sri Lanka Cereal production

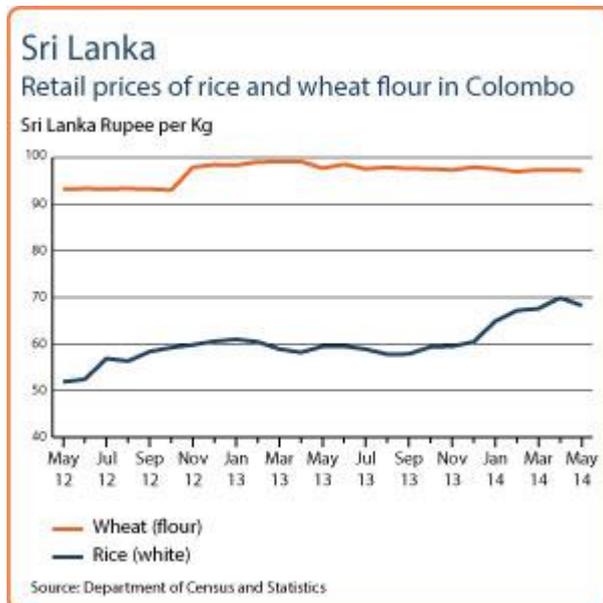
	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes			percent
Rice (paddy)	4 063	4 621	3 900	-16
Maize	185	248	256	3
Millet	7	7	7	0
Others	0	0	0	0
Total	4 255	4 876	4 163	-15

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



Overall food security situation has improved but localized food insecurity persists

The food security situation has improved since 2009 after the end of the 25-year old conflict between the Liberation Tigers of Tamil Eelam (LTTE) and the Government forces in 2009. Most of the IDP camps are now closed but based on Government statistics compiled by UNHCR, still some 80 216 people are estimated to be displaced as of mid-2013, living mostly with host families. The increase in prices of rice, the main staple in the country, is also hampering access to food of large numbers of the low-income population.



Reference Date: 05-May-2014

FOOD SECURITY SNAPSHOT

- The 2014 *Maha* season paddy crop reduced by prolonged dry weather
- Cereal imports forecast to increase in 2014
- Rice prices at record levels
- Overall food security situation has improved but localized food insecurity persists

The 2014 *Maha* season rice production reduced by prolonged dry weather

Harvesting of the 2014 main season (*Maha*) rice and maize crops was completed by mid-April. The 2014 *Maha* rice output, accounting for over 60 percent of the annual production, is officially estimated at 2.4 million tonnes, 17 percent below last year's record level of the same season. The sharp reduction is mainly the result of a 15 percent contraction in area planted, following the prolonged dry weather since the beginning of the season particularly in the key northern and eastern producing areas. Early prospects for the 2014 mostly irrigated secondary *Yala* rice crop, currently being planted, are also unfavourable. This mainly reflects insufficient availability of water supplies for irrigation following the dry weather earlier in the year, which is likely to result in reduced plantings and yields. FAO tentatively forecasts the 2014 aggregate rice production (including the 2014 *Maha* and the ongoing 2014 *Yala* seasons) at 3.8 million tonnes, some 19 percent lower than the 2013 record output and 8 percent below the average level of the previous five years.

Recently revised official forecasts put the 2014 aggregate maize production (including the 2014 *Maha* and the ongoing 2014 secondary *Yala* seasons) at a record level of 256 215 tonnes, 3 percent up from the 2013 bumper level. The projected record output is mainly attributed to a 24 percent expansion in the area planted in the *Maha* season, which more than offset the damages due to the dry weather.

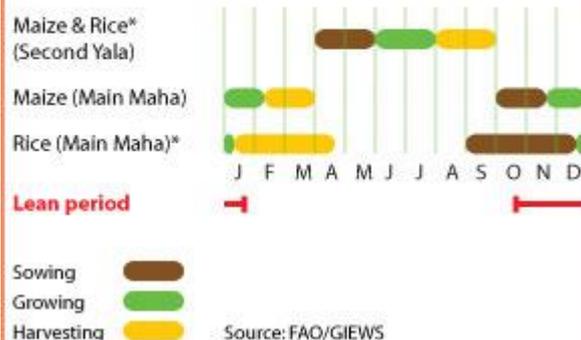
Cereal imports forecast to increase in 2014 marketing year (January/December)

Cereal imports in 2014 marketing year (January/December) are forecast at 1.2 million tonnes, some 9 percent above last year's level. The increase is mainly attributed to higher rice imports forecast at 120 000 tonnes up from the 30 000 tonnes in 2013. Imports of wheat (which is not produced domestically) are anticipated to remain at their average level of 1.1 million tonnes.

Rice prices surged to record levels in April, while those of wheat remained stable

Rice prices increased considerably and reached record levels in April, mainly reflecting the sharp decline in the 2014 main *Maha* harvest. Strong domestic demand during traditional holidays (Sinhalese New Year on 14 April) also put upward pressure on prices. In the capital city market, the retail prices of rice were at levels 23 percent higher than a year earlier.

Sri Lanka Crop calendar (*major foodcrop)

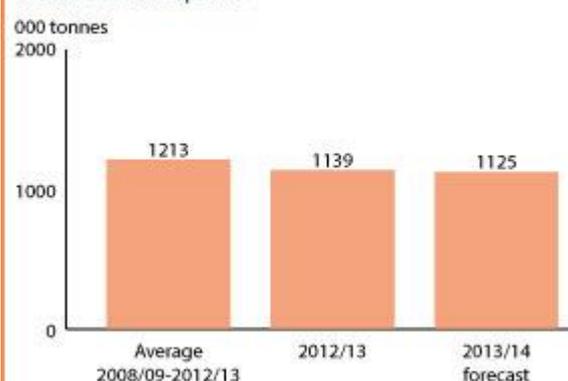


Sri Lanka Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes		percent	
Rice (paddy)	4 063	4 621	3 750	-19
Maize	185	248	256	3
Millet	7	7	7	0
Others	0	0	0	0
Total	4 255	4 876	4 013	-18

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

Sri Lanka Total cereal imports

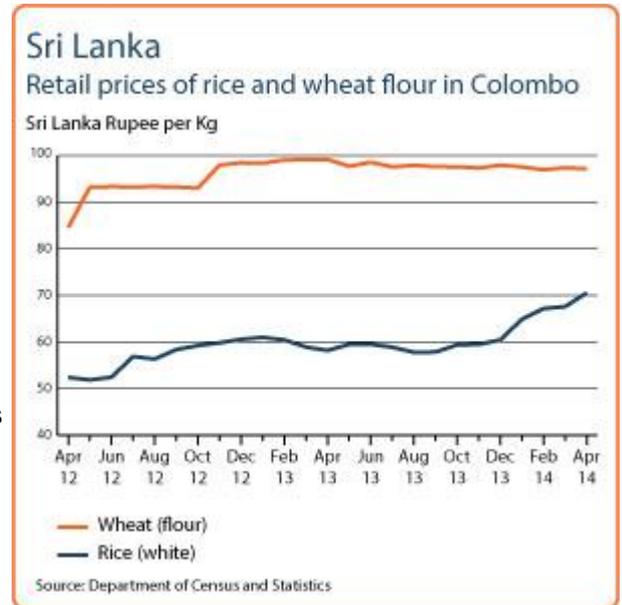


Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Prices of wheat flour, which are normally regulated, have remained stable in recent months and were slightly lower than their year earlier levels.

Overall food security situation has improved but localized food insecurity persists

The food security situation has improved since 2009 after the end of the 25-year old conflict between the Liberation Tigers of Tamil Eelam (LTTE) and the Government forces in 2009. Most of the IDP camps are now closed but based on Government statistics compiled by UNHCR, still some 80 216 people are estimated to be displaced as of mid-2013, living mostly with host families. The increase in prices of rice, the main staple in the country, is also hampering access to food of large numbers of the low-income population.



Reference Date: 28-January-2014

FOOD SECURITY SNAPSHOT

- Below average rains expected to limit the 2014 *Maha* season paddy production
- Record cereal harvest estimated in 2013
- Prices of rice increase seasonably, while those of wheat flour generally stable
- Overall food security situation has improved but localised food insecurity persist

Below average rains expected to limit the 2014 *Maha* season paddy production

Harvesting of the 2013/14 main season (*Maha*) paddy began in early January and will continue until mid-April. The start of the season was characterised by below average rains between first dekad of September and the third dekad of November over much of the country, particularly delaying sowing operations in the main producing areas of North Central, North Western and Eastern provinces of the country. Although the rains resumed to more normal levels since early December, providing much needed relief, the reduction in the area planted to paddy, is expected to limit production this season.

Record cereal harvest estimated in 2013

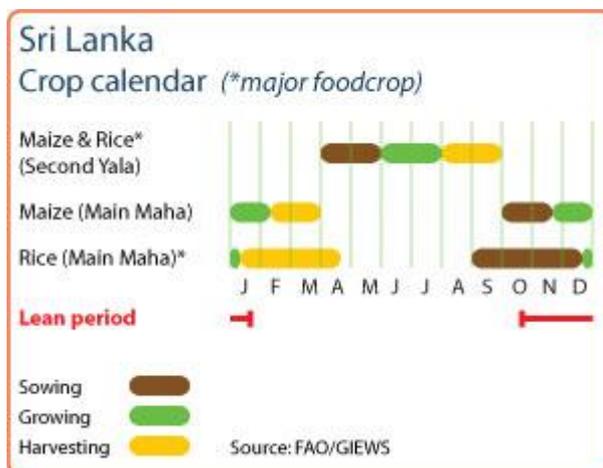
The 2013 aggregate cereal production is estimated at 4.7 million tonnes, marking an increase of some 17 percent relative to the last year's below-average outcome. Despite recurring localised floods during the main *Maha* season, the aggregate 2013 paddy production is estimated at 4.5 million tonnes, some 16 percent up on the dry weather affected 2012 crop. The increase mainly reflects higher plantings, after new land came under cultivation in the northern and eastern areas, with the support from the government.

The 2013 maize crop, is officially estimated to reach a new record level of 248 000 tonnes, pointing to an increase of 23 percent over the 2012 bumper harvest. The increase mainly reflects an expansion in area by 42 percent, although below average rains during the growing season reduced the yields somewhat.

As a direct consequence of the record production in 2013, the cereal import requirement in the 2014 marketing year (January/December) is forecast at 1 million tonnes, some 9 percent lower than last year's level. Almost all this volume is wheat which is not produced in the country and totally imported. As a result of bumper paddy harvests in recent years, the country is near self-sufficient in rice production.

Prices of rice increase seasonably, while those of wheat flour generally stable

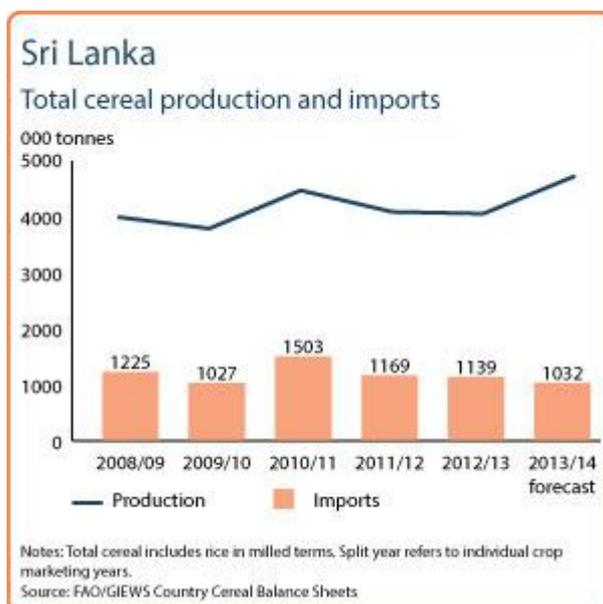
The price of rice, which decreased between July and September 2013, increased seasonably since then with the beginning of the lean season. Recent months' higher prices are also supported by concerns about a possible decrease in paddy production of the current main (*Maha*) season, following poor rainfall. In the capital city market the retail price



Sri Lanka Cereal production

	2008-2012 average	2012	2013 estimate	change 2013/2012
	000 tonnes		percent	
Rice (paddy)	3,914	3,846	4,471	16
Maize	158	201	248	23
Millet	7	7	7	0
Others	0	0	0	0
Total	4,078	4,054	4,726	17

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

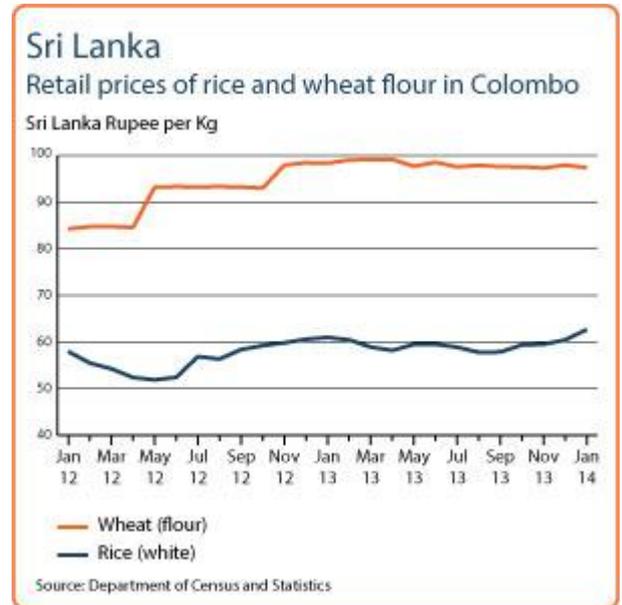


of rice in January 2013 was at levels 5 percent higher than a year earlier.

Price of wheat flour, which is normally regulated, has been relatively stable at near record level since November 2012. In December 2013, it averaged LKR 97.5 (about USD 0.75) per kg.

Overall food security situation has improved but localised food insecurity persists

The food security situation has improved after the end of the 25-year old conflict between the Liberation Tigers of Tamil Eelam (LTTE) and the government forces in 2009. Most of the IDP camps are now closed but based on Government statistics compiled by UNHCR, still some 80 216 people are estimated to be displaced as of mid-2013, living mostly with host families.



Reference Date: 12-July-2013

FOOD SECURITY SNAPSHOT

- Record harvest estimated for 2013 *Maha* season paddy and maize crops
- Below average cereal harvest in 2012
- Prices of rice and wheat remain generally high but stable
- Overall food security situation has improved but food insecurity persists for vulnerable groups

Record harvest estimated for 2013 *Maha* season paddy and maize crops

Harvesting of the 2013 main season (*Maha*) paddy and maize crops was completed in April. The season was characterized by heavy rains between early November and February which caused localized flooding particularly in North Central, Northern, Eastern and Uva (in the south) provinces. Preliminary official estimates, as of mid-March, indicate that approximately 78 903 hectares of rice crop, representing about 6 percent of the estimated total rice plantings in 2013, have been affected due to the floods.

This season's paddy production is anticipated at 2.7 million tonnes, similar to last year's record level of the same season. Similarly, maize harvest of the 2013 *Maha* season is officially estimated to reach a record level at 218 558 tonnes, some 32 percent up on previous year's bumper harvest of the same season. The increase in harvest is predominantly attributed to an expansion in planted area by 52 percent.

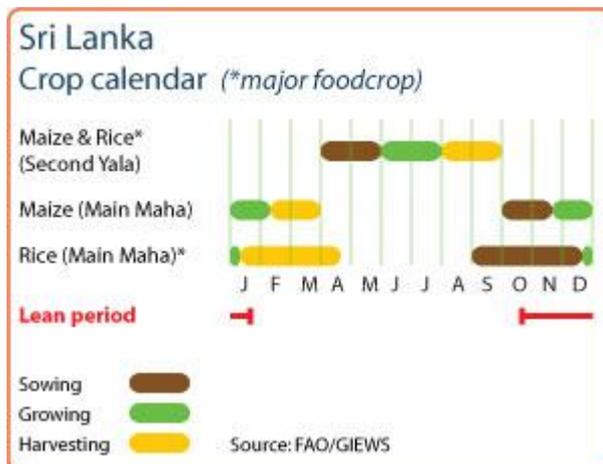
Currently, the 2013 secondary season *Yala* paddy and maize crops, sown from April to May, are growing under generally favourable weather conditions in most regions of the country. Assuming normal weather during the secondary season, the 2013 aggregate paddy production is anticipated at 4.1 million tonnes, a recovery of 6.6 percent from last year's drought affected output.

Below average cereal harvest in 2012

The 2012 aggregate cereal production has been revised downwards to 4.08 million tonnes, similar to the previous five-year average. In aggregate, the 2012 paddy production is estimated at 3.8 million tonnes, some 1.2 percent below the flood affected crop in 2011.

The decrease in production is mainly attributed to significant damages to second (*Yala*) season harvest, following the prolonged drought conditions between June and September. The 2012 maize crop, is officially estimated to reach at 223 000 tonnes, pointing to an increase of 21 percent over the 2011 record harvest.

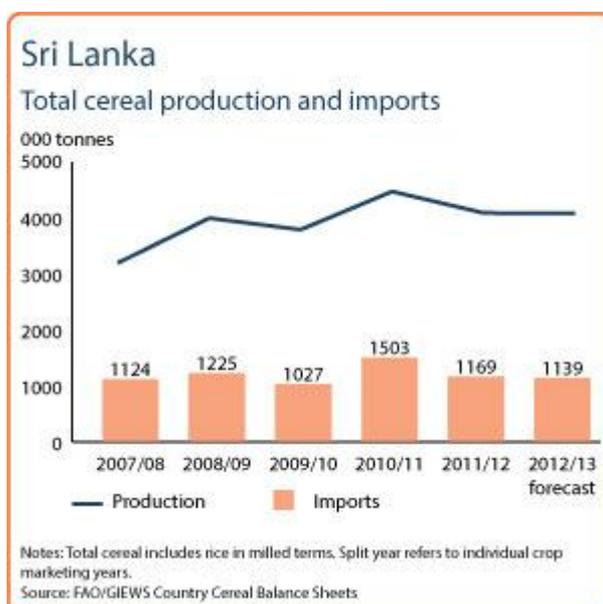
In response to the good production in 2012, the cereal import requirement in the 2013 marketing year (January/December) is forecast at 1.1 million tonnes, slightly lower than the previous year's level. As a result of bumper paddy harvest in recent years, the country is near self-sufficiency in rice. Since wheat is not produced, the country imports all of its consumption requirements, forecast for 2013 at normal level of about 1.1 million tonnes.



Sri Lanka Cereal production

	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes		percent	
Rice (paddy)	3 914	3 846	4 100	7
Maize	162	223	252	13
Millet	7	7	7	0
Others	0	0	0	0
Total	4 083	4 076	4 359	7

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



Prices of rice and wheat remain generally high but stable

The price of rice, which has been on steady rise between June 2012 and February 2013, remained generally stable since, following satisfactory supplies from the 2013 main season *Maha* paddy harvest. In the capital city market the retail price of rice in June 2013 was 13.5 percent higher compared to the level a year ago.

The price of wheat flour, which is normally regulated, has been relatively stable since December 2012. In June 2013, it averaged LKR 98.6 (about USD 0.76) per kg, some 5.6 percent higher than a year earlier.

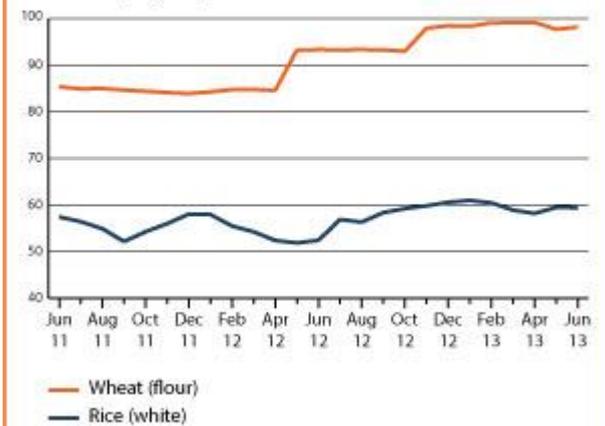
Overall food security situation has improved but food insecurity persists for vulnerable groups

The food security situation has improved after the end of the 25-year old war between the Liberation Tigers of Tamil Eelam (LTTE) and the government forces in May 2009. Most of the IDP camps are now closed but still some 93 482 people were estimated to be displaced as of January 2013, based on Government statistics compiled by UNHCR, living mostly with host families. The floods between November and February, affected over 400 000 people and is further exacerbating the situation of already vulnerable population particularly in Northern and Eastern regions of the country.

Sri Lanka

Retail prices of rice and wheat flour in Colombo

Sri Lanka Rupee per Kg



Source: Department of Census and Statistics

Reference Date: 17-January-2013

FOOD SECURITY SNAPSHOT

- Heavy rains cause some localized flooding early in the 2012/13 cropping season
- Near-record cereal harvest estimated in 2012
- Prices of rice and wheat continue to gain strength
- Overall food security situation has improved but localised food insecurity persist

Heavy rains cause some localized flooding early in the 2012/13 cropping season

Harvesting of the 2012/13 main season (*Maha*) paddy began in early January and will continue until mid-April. The season was characterised by heavy rains in early November–December which caused localised flooding particularly in North Western, Northern, Eastern and Uva (located in the south) provinces of the country. The overall prospects for the season are good, although floods have caused damage in certain areas.

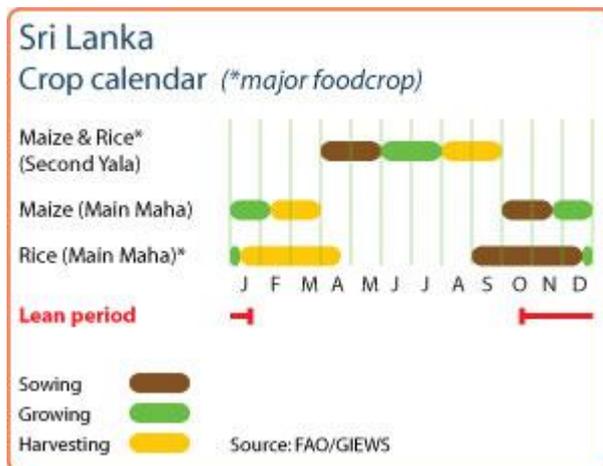
Near-record cereal harvest estimated in 2012

The 2012 aggregate cereal production is estimated at 4.46 million tonnes, marking an increase of some 10 percent relative to the last year's above-average outcome. In aggregate, the 2012 paddy production is estimated at 4.2 million tonnes, some 9 percent up on the flood affected 2011 but slightly below the record crop in 2010. The increase mainly reflects a record main (*Maha*) crop, following an expansion in planted area and exceptional high yields, which more than compensated the drought-reduced 2012 second (*Yala*) season harvest. According to the Socio Economics and Planning Centre (SEPC) of Department of Agriculture, the drought conditions between June and September reduced the 2012 *Yala* paddy production to 1.2 million tonnes, some 35 percent below previous year's record harvest of the same season. The 2012 maize crop, is officially estimated to reach a new record level of 223 000 tonnes, pointing to an increase of 21 percent over the 2011 another record harvest.

In response to the bumper production in 2012, the cereal import requirement in the 2013 marketing year (January/December) is forecast at 1.2 million tonnes, slightly lower than last year's level. As a result of bumper paddy harvest in recent years, the country is near self-sufficient in rice. Since wheat is not produced, the country imports all of its consumption requirements, forecast for 2013 at normal level of about 1 million tonnes.

Prices of rice and wheat continue to gain strength

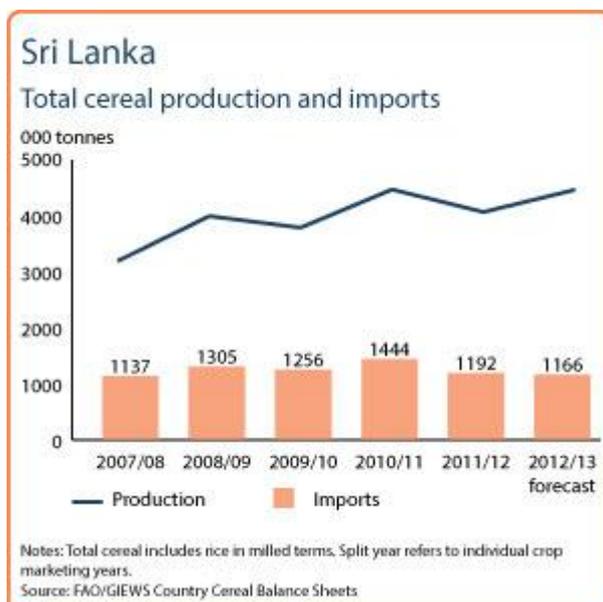
The price of rice has been on steady increase since June 2012, following the estimated drought-reduced harvest of the second season (*Yala*) paddy crop and following paddy millers' decision to impose higher rice prices, due to high grain costs. In the capital city market the retail price of rice was 4 percent higher in December 2012 compared to the level a year ago. Similarly, the price of wheat flour, which is normally regulated and has been relatively stable since May 2012, increased considerably in November reaching record levels. This



Sri Lanka Cereal production

	2007-2011 average	2011	2012 forecast	change 2012/2011
	000 tonnes			percent
Rice (paddy)	3,767	3,875	4,234	9
Maize	129	185	223	21
Millet	7	7	7	0
Others	0	0	0	0
Total	3,902	4,067	4,464	10

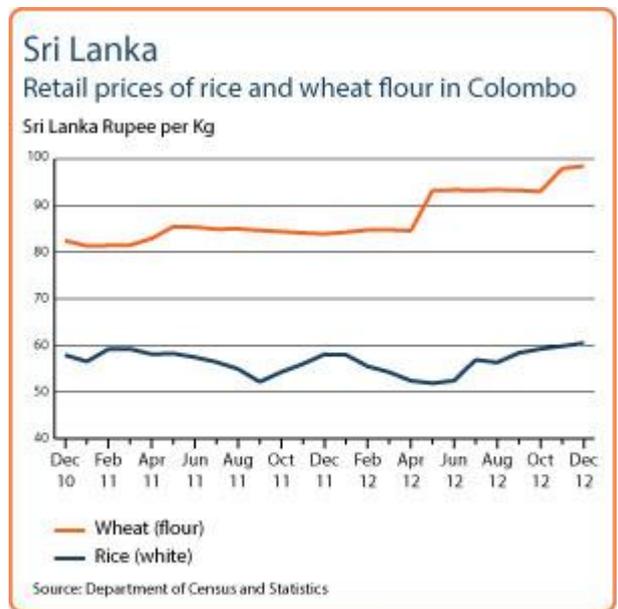
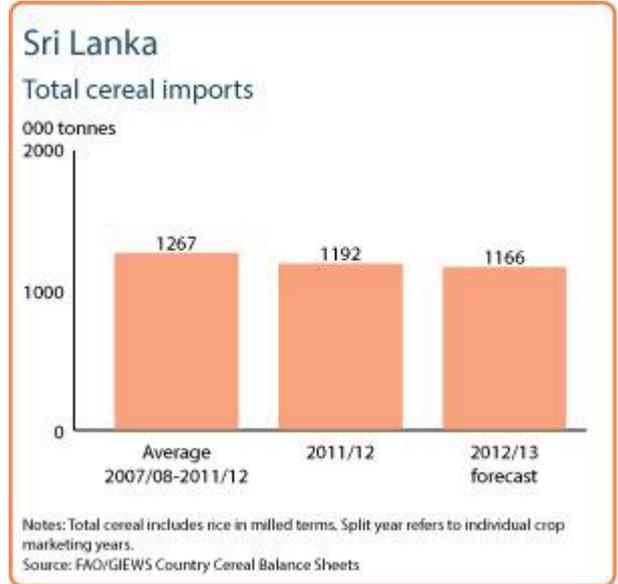
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



increase mainly reflects higher prices imposed by the country's main milling companies, following higher cost of imports, the depreciation of the Sri Lanka Rupee (LKR) and increase in transport costs. In December 2012, it averaged LKR 98 (about USD 0.78) per kg, some 17 percent higher than a year earlier.

Overall food security situation has improved but localised food insecurity persists

The food security situation has improved after the end of the 25-year old war between the Liberation Tigers of Tamil Eelam (LTTE) and the government forces in May 2009. Most of the IDP camps are now closed but still more than 115 000 people are estimated to be displaced as of September 2012, based on Government statistics compiled by UNHCR, living mostly with host families. Recent floods, affected over 400 000 people and is further exacerbating the situation of already vulnerable population particularly in Northern and Eastern regions of the country.



Reference Date: 27-June-2012

FOOD SECURITY SNAPSHOT

- Record harvest estimated for 2012 Maha season paddy crop
- The 2011 aggregate rice output declined
- Price of rice has been decreasing since the beginning of the year while price of wheat flour increased sharply in May 2012
- Overall food security situation has improved

Record harvest estimated for 2012 *Maha* season paddy crop

Harvesting of the main season (*Maha*) paddy and maize crops was completed in April. The official estimate puts this season's paddy production at a record level of 3 million tonnes, some 16 percent above 2011 flood-affected output of the same season.

The increase in harvest is predominantly attributed to an expansion in the planted area by 12 percent, generally favourable rainfall as well as an adequate input supply during the growing season.

Similarly, maize harvest of the 2012 *Maha* season is officially estimated to have reached a record level at 188 400 tonnes, an increase of about 18 percent over the previous year's bumper harvest of the same season.

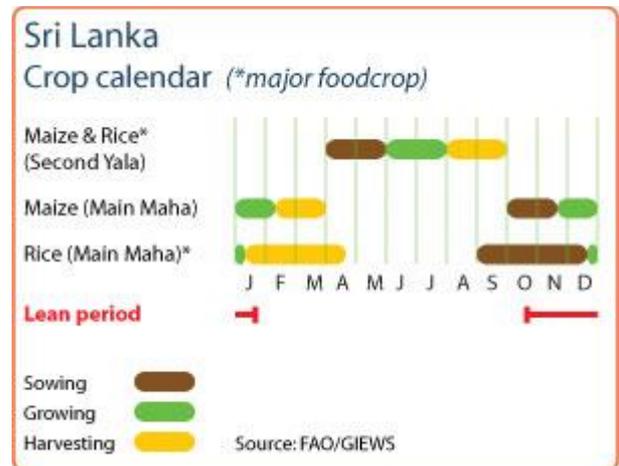
Currently, the 2012 secondary season (*Yala*) paddy and maize crops, sown from April to May, are growing under generally scanty rainfall condition in most regions of the country. According to the Sri Lanka Department of Meteorology rainfall distribution is expected to improve once the southwest monsoon arrives.

The 2011 annual rice output is estimated to be lower than in 2010, following flood damage to the *Maha* season paddy crop

According to the Department of Census and Statistics of Sri Lanka, the 2011 aggregate paddy production stood at 3.9 million tonnes, some 10 percent lower than the record output in 2010. This mainly reflects the decline of the *Maha* season paddy crop to 2 million tonnes, about 24 percent below the 2010 record harvest of the corresponding season. This was mainly due to the impact of localized flooding, poor sunlight conditions during the growing period and reduction in paddy planting. At this level of production, the country is almost self-sufficient in rice. Since wheat is not produced in the country, the import requirements in the marketing year 2012 (Jan/Dec) are estimated at a normal level of about 1 million tonnes.

Price of rice has been decreasing since the beginning of the year while price of wheat flour increased sharply in May 2012

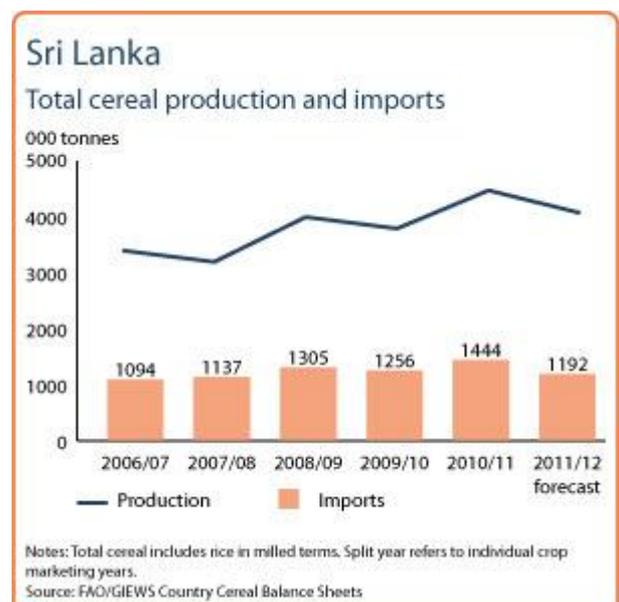
The price of rice has fallen steadily since January 2012, following the



Sri Lanka Cereal production

	2007-2011 average	2011	2012 forecast	change 2012/2011
	000 tonnes		percent	
Rice (paddy)	3 767	3 875	4 500	16
Maize	129	185	214	16
Millet	7	7	7	0
Others	0	0	0	0
Total	3 902	4 067	4 721	16

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

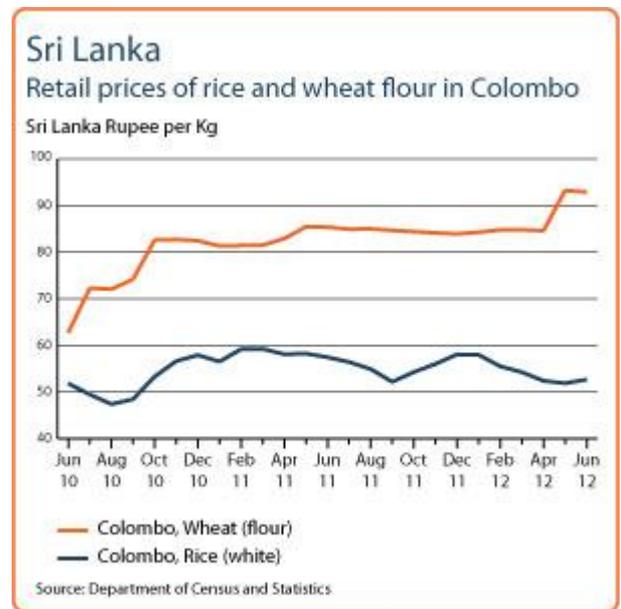
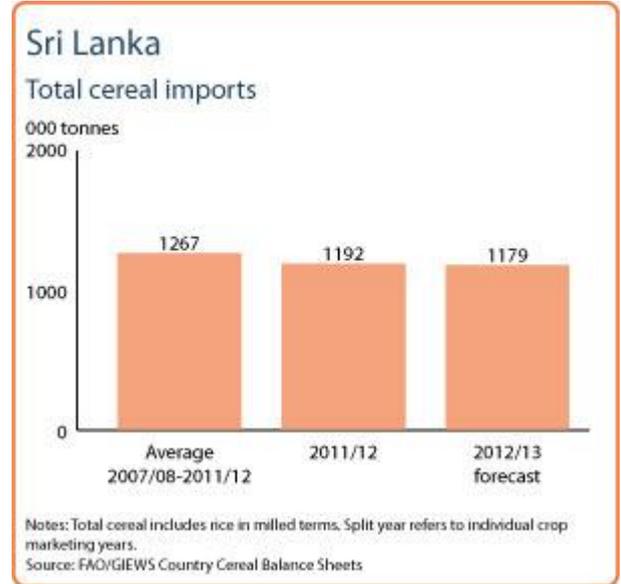


estimated record harvest of the main season (*Maha*) paddy crop. In the capital city market it showed a decline of 8 percent in June 2012 from its level a year ago.

By contrast, the price of wheat flour, which has been relatively stable for twelve months, increased sharply in May 2012, following the depreciation of the Sri Lanka Rupee (LKR) and increase in transport costs. In May 2012, it reached a new record level averaging LKR 93 (about USD 0.70) per Kg, some 9 percent higher than a year earlier.

Overall food security situation has improved

The food security situation has dramatically improved after the end of the 25-year old war between the Liberation Tigers of Tamil Eelam (LTTE) and the government forces in May 2009. Most of the IDP camps are now closed but some IDPs remain with host families or in transit situation. According to the Disaster Management Centre, the floods during December 2010-January 2011 in the eastern and central parts of the country had affected over 1 million people.



Reference Date: 14-February-2012

FOOD SECURITY SNAPSHOT

- The official production forecast for *Maha* 2011/12 is set a record level
- The 2011 annual rice output is estimated to decline slightly from 2010, following flood damage to paddy crop in the main (*Maha*) season
- Rice prices have been rising in the last several months but stabilized in January while wheat flour prices remain stable
- Over 1 million people were affected by the floods earlier in the year in the east and central parts of the country

The official production forecast for *Maha* 2011/12 is set at record level

Harvesting of the main season (*Maha*) paddy and maize crops is currently underway. The official forecast puts the *Maha* 2011/12 paddy production at a record level of 2.76 million tonnes, some 6 percent above last year's another record output of the same season. The increase in harvest is predominantly attributed to the generally favourable rainfall and input supply during the growing season.

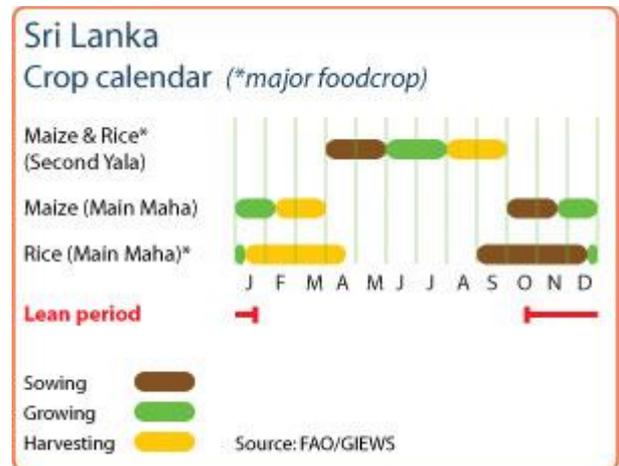
The 2011 annual rice output is estimated to be lower than in 2010, following flood damage to the *Maha* season paddy crop

Harvesting of the second season (*Yala*) paddy rice was completed by September. According to the final estimate of the Provincial Departments of Agriculture the paddy production of the *Yala* 2011 is put at 1.95 million tonnes, some 16 percent higher than the production of the same season year before. However, the total annual paddy production for 2011, including the harvest of the main *Maha* crop harvested earlier last, is estimated at 4.26 million tonnes, still about one percent below last year's record output. This mainly reflects the impact of localized flooding, poor sunlight conditions during the growing period and reduction in paddy planting for the main *Maha* season.

With this level of production, nationally, the country is more-or-less self-sufficient in rice. Since wheat is not produced in the country, the import requirements in marketing year 2011 are estimated at a normal level of some 1 million tonnes. In order to reduce dependence on imports the Government has increased import duties on wheat.

Rice prices stabilized in January 2012 after increasing for several months while wheat flour prices remain stable since May 2011

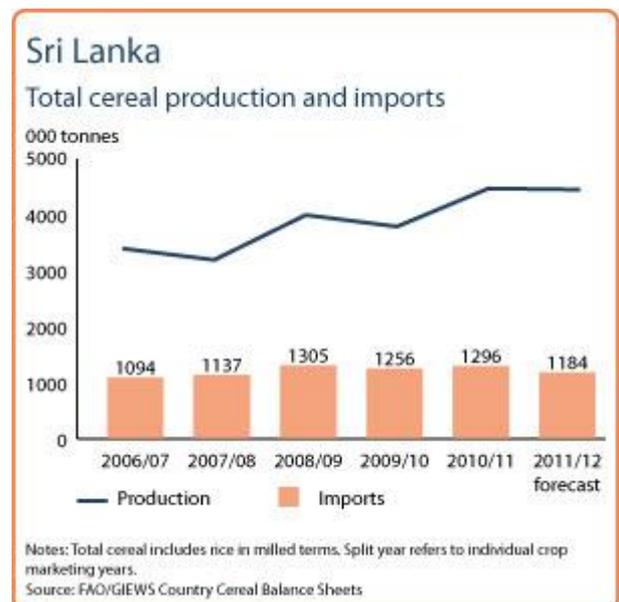
The price of rice has been increasing since September last year, but stabilized during January. It showed an increase by 11 percent in January 2012 from its level in September 2011 and rose by 2.5 percent from the same month last year. The price had declined



Sri Lanka
Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes		percent	
Rice (paddy)	3 660	4 301	4 255	-1
Maize	101	161	185	15
Millet	6	7	7	0
Others	0	0	0	0
Total	3 768	4 469	4 447	0

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

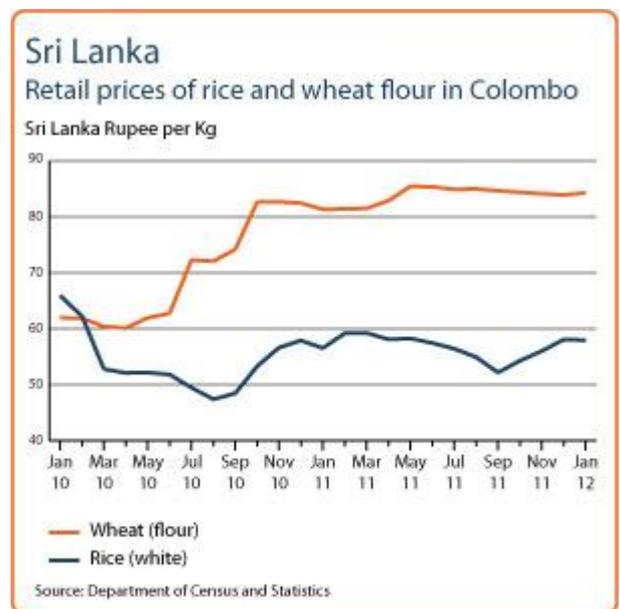
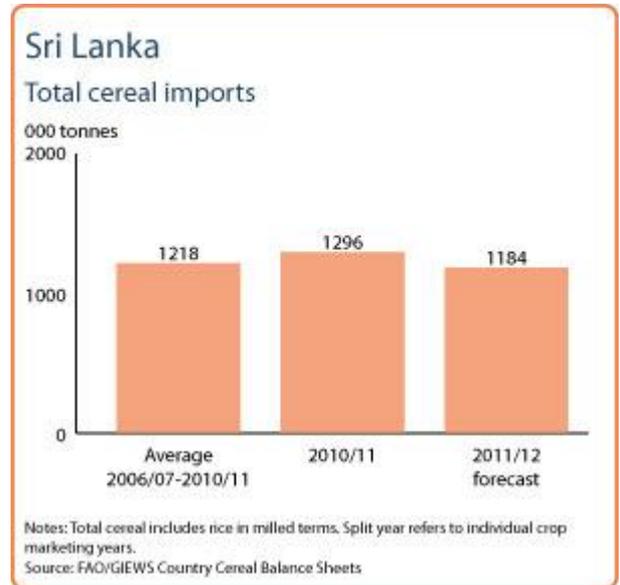


between February and September 2011, following the main and second season harvests. However, given that the country is entirely dependent on imports for wheat, the wheat flour prices have remained strong.

The Government of Sri Lanka set up a policy in order to create self-sufficiency in rice production and encourage rice consumption. The Government further plans to subsidize, up to 95 percent, the fertilizer costs and provide free irrigation water.

Overall food security situation has improved

Food security situation has dramatically improved after the end of the 25-year old war between the Liberation Tigers of Tamil Eelam (LTTE) and the government forces in May 2009. Most of the IDP camps are now closed but some IDPs remain with host families. According to the Disaster Management Centre, the floods during December 2010-January 2011 in the eastern and central parts of the country had affected over 1 million people.



Reference Date: 29-November-2011

FOOD SECURITY SNAPSHOT

- The 2011 annual rice output is estimated to decline slightly from 2010, following flood damage to paddy crop in the main (*Maha*) season
- Rice prices increased slightly in November while wheat flour prices remain stable
- Over 1 million people were affected by the floods earlier in the year in the east and central parts of the country

The 2011 annual rice output is estimated to be lower than in 2010, following flood damage to the *Maha* season paddy crop

Harvesting of the second season (*Yala*) paddy rice has recently been completed. According to the final estimate of the Provincial Departments of Agriculture the paddy production of the *Yala* 2011 is put at 1.95 million tonnes, some 16 percent higher than the production of the same season year before. However, the total annual paddy production for 2011, including the harvest of the main *Maha* crop harvested earlier in the year, is estimated at 4.26 million tonnes, still about one percent below last year's record output. This mainly reflects the impact of localized flooding, poor sunlight conditions during the growing period and reduction in paddy planting for the main *Maha* season.

With this level of production, nationally, the country is more-or-less self-sufficient in rice. Since wheat is not produced in the country, the import requirements in marketing year 2011 are estimated at a normal level of some 1 million tonnes. In order to reduce dependence on imports the Government has increased import duties on wheat.

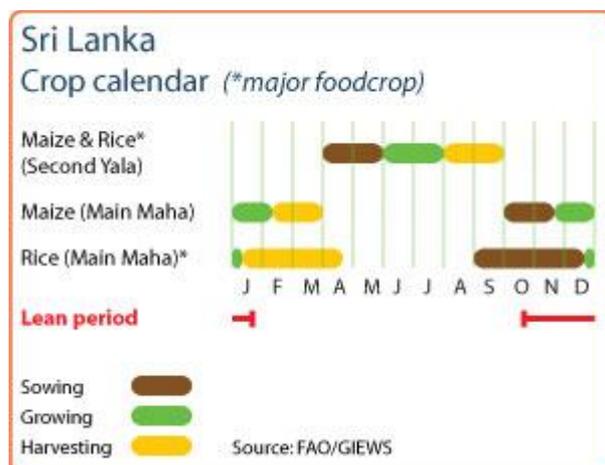
Rice prices increased slightly in November while wheat flour prices remain stable

The price of rice showed a slight increase by 1.4 percent in November from its level in October and decreased by 2.8 percent from the same month last year. The price had declined since February especially following the main and second season harvests. However, given that the country is entirely dependent on imports for wheat, the wheat flour prices have remained strong following the trend of international prices when converted to local currency.

The Government of Sri Lanka set up a policy in order to create self-sufficiency in rice production and encourage rice consumption. The Government further plans to subsidize, up to 95 percent, the fertilizer costs and provide free irrigation water.

Overall food security situation has improved

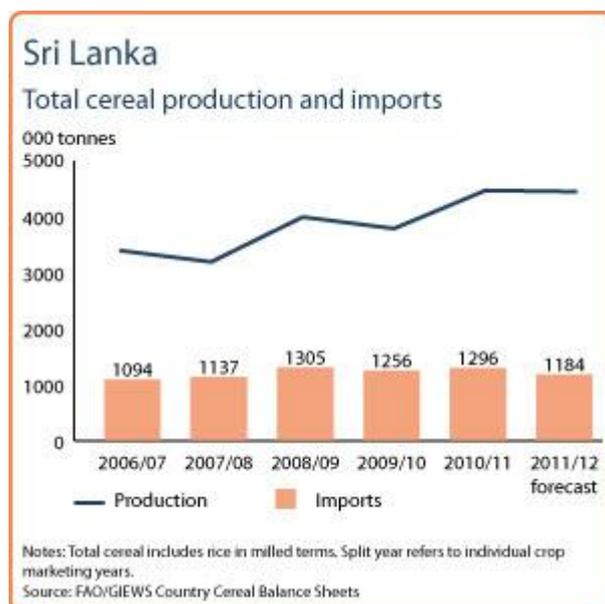
Food security situation has dramatically improved after the end of the 25-year old war between the Liberation Tigers of Tamil Eelam (LTTE) and the government forces in May 2009. Most of the IDP camps are



Sri Lanka Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes		percent	
Rice (paddy)	3 660	4 301	4 255	-1
Maize	101	161	185	15
Millet	6	7	7	0
Others	0	0	0	0
Total	3 768	4 469	4 447	0

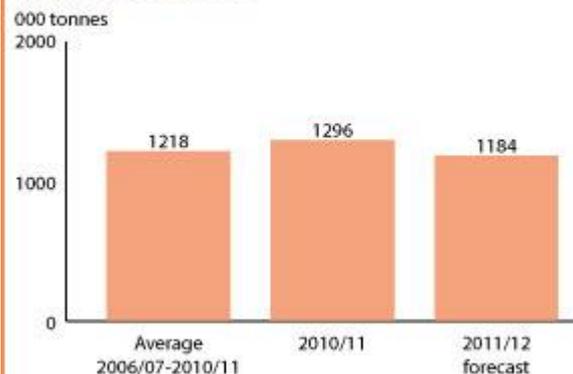
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



now closed but some IDPs remain with host families. According to the Disaster Management Centre, the floods during December 2010-January 2011 in the eastern and central parts of the country had affected over 1 million people.

Sri Lanka

Total cereal imports



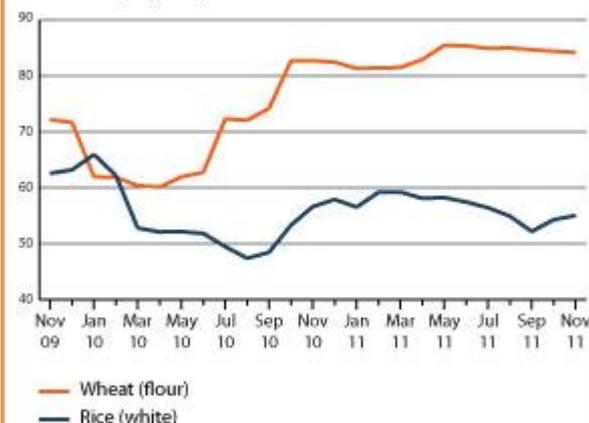
Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.

Source: FAO/GIEWS Country Cereal Balance Sheets

Sri Lanka

Retail prices of rice and wheat flour in Colombo

Sri Lanka Rupee per Kg



Source: Department of Census and Statistics

GIEWS Country Brief

Sri Lanka



Reference Date: 12-August-2011

FOOD SECURITY SNAPSHOT

- In spite of the official paddy production forecast for Yala 2011 at a record level, the aggregate annual 2011 output expected to be lower than in 2010.
- Improved rice production forecast of the secondary season leads to declining prices in many market.
- Over 1 million people were affected by the floods earlier in the year in the east and central part of the country and require humanitarian assistance

The official production forecast for Yala 2011 is set at a record level, 15 percent higher than the production in the same season year before

According to the Provincial Departments of Agriculture the estimate of the Yala 2011 paddy production is 1.92 million tonnes, 15 percent higher than the production of Yala 2010 secondary season and 39 percent higher than the average Yala season volume of past five years. However, the total annual paddy production for 2011, estimated at 4.22 million tonnes, is still about two percent below last year's record output but 15 percent over the reduced harvest of 2009.

Despite an expansion in paddy planting for the main Maha season 2010/2011, severe flooding and poor sunlight conditions during the growing season negatively impacted yields. While paddy yields were down, total rice production was only slightly down due to increase in area planted.

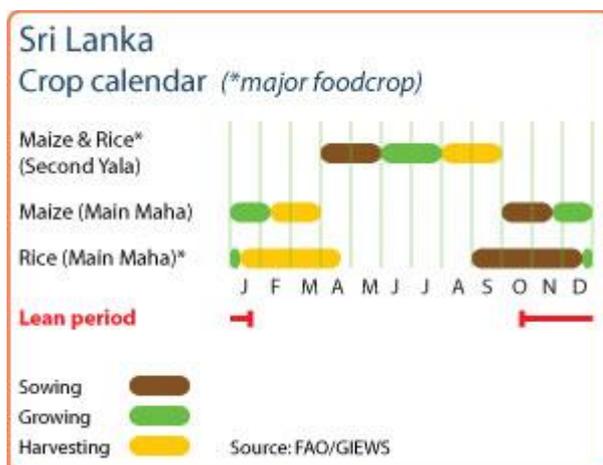
Wheat is not produced in the country. Import requirements in marketing year 2011 are estimated at a normal level of some 1 million tonnes. In order to reduce dependence on imports the Government has increased import duties on wheat.

Favourable forecast of Yala season paddy crop leads to decline in rice prices

The retail price of rice in the Colombo market has been declining since February following the harvest of the main season. This decline continued with the current official forecast of a record harvest of the secondary season. Given that the country is entirely dependent on imports for wheat, the wheat flour prices have remained strong following the trend of international prices. The current decrease in the international prices is not yet reflected in the domestic market.

The Government of Sri Lanka set up a policy in order to create self-sufficiency in rice production and encourage rice consumption. The Government further plans to subsidize up to 95 percent of the fertilizer costs and provide free irrigation water. The policies are also addressing the need to improve yields through research and development.

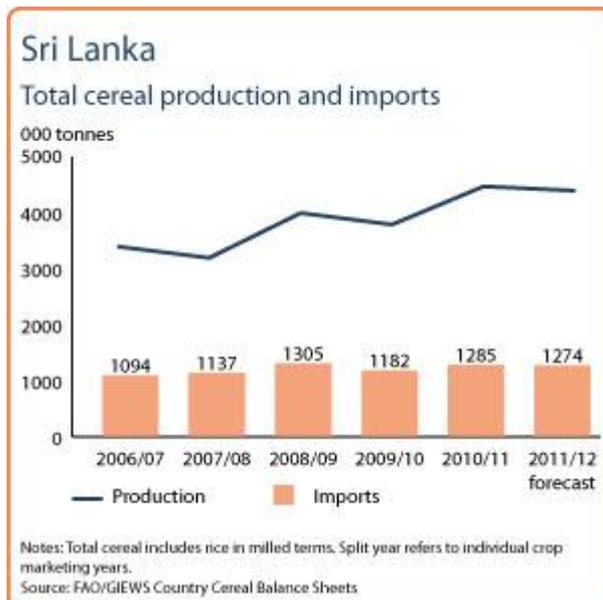
Overall food security situation has improved



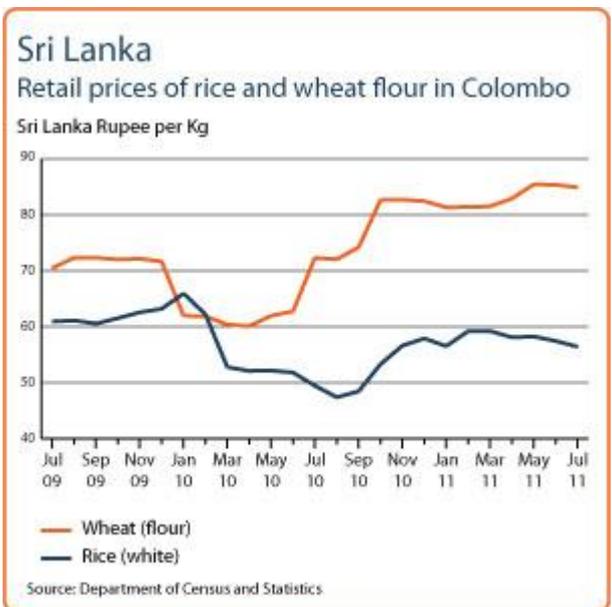
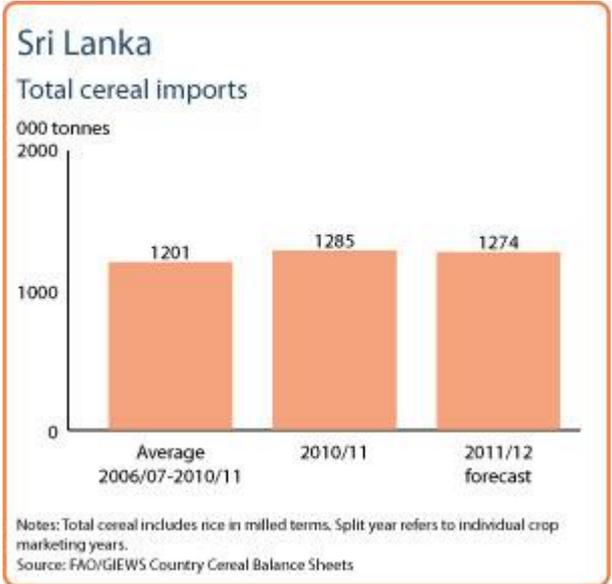
Sri Lanka Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes		percent	
Rice (paddy)	3 660	4 301	4 220	-2
Maize	101	161	169	5
Millet	6	7	4	-43
Others	6	7	4	-43
Total	3 768	4 469	4 393	-2

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



Food security situation has dramatically improved after the end of the 25-year old war between the Liberation Tigers of Tamil Eelam (LTTE) and the government forces in May 2009. Most of the IDP camps are now closed but some IDPs remain with host families. According to the Disaster Management Centre, the floods during December 2010-January 2011 in the eastern and central parts of the country had affected over 1 million people.



Reference Date: 25-May-2011

FOOD SECURITY SNAPSHOT

- Estimates of 2011 *Maha* season paddy crop revised downwards due to flood damages
- The reduced domestic production and rising international prices lead to a sharp rise in food prices since August 2010
- Over 1 million people have been affected by the floods in the east and central part of the country and require humanitarian assistance

Estimates of the 2011 Maha season paddy crop revised downwards due to flood damage

Harvesting of the main season (*Maha*) paddy and maize crops is currently underway. Given the generally favourable rainfall and input supply situation during the growing season a bumper harvest of paddy was anticipated. However, heavy rains in December-January have caused severe flood damage in the eastern and central parts of the country. According to the Ministry of Agriculture the revised estimate of the *Maha* 2011 paddy production is 2.02 million tonnes, some 23 percent down from the previous year's bumper *Maha* crop. Damage to other crops has been much less. For example, maize harvest of the *Maha* season is expected to increase by 6 percent over the previous year.

The final estimate of paddy production for 2010 was a historical record at 4.3 million tonnes, about 17 percent over the reduced harvest of 2009.

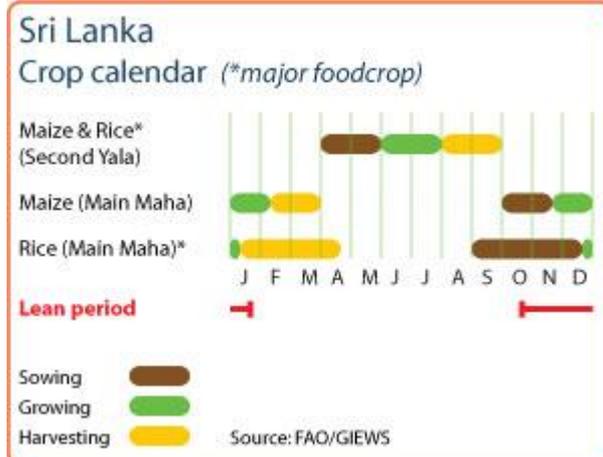
Wheat is not produced in the country. Import requirements in marketing year 2011 are estimated requirement at a normal level of some 1 million tonnes. In order to reduce dependence on imports the Government has increased import duties on wheat.

International price hikes lead to significant rise in wheat and rice prices

Given that the country is a net importer of both wheat and rice domestic prices are affected by the rising international prices. The increase of rice price has been also supported by production loss due to floods to the crop during last few months. April price of white rice in Colombo market was slightly down over the price month before.

Overall food security situation has improved

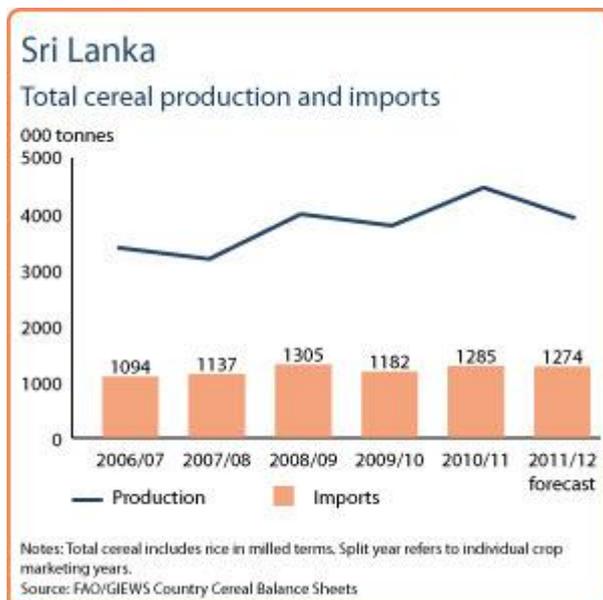
Food security situation has dramatically improved after the end of the 25-year old war between the Liberation Tigers of Tamil Eelam (LTTE) and the government forces in May 2009. Most of the IDP camps are now closed but some IDPs remain with host families. According to the Disaster Management Centre, as of 16 January 2011, the floods of past few months in the eastern and central parts of the country have affected over 1 million people. Various international appeals to mobilize humanitarian assistance are being launched.



Sri Lanka Cereal production

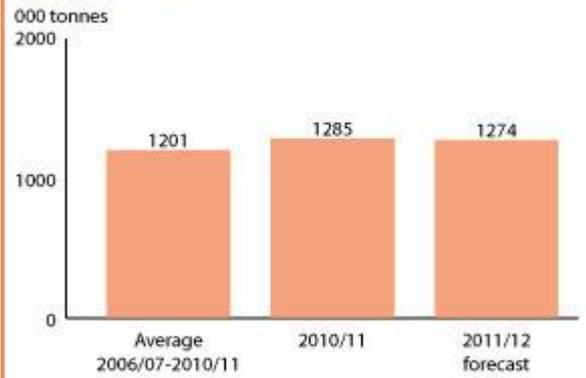
	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes		percent	
Rice (paddy)	3 660	4 301	3 750	-13
Maize	101	161	169	5
Millet	6	7	4	-43
Others	6	7	4	-43
Total	3 768	4 469	3 923	-12

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



Sri Lanka

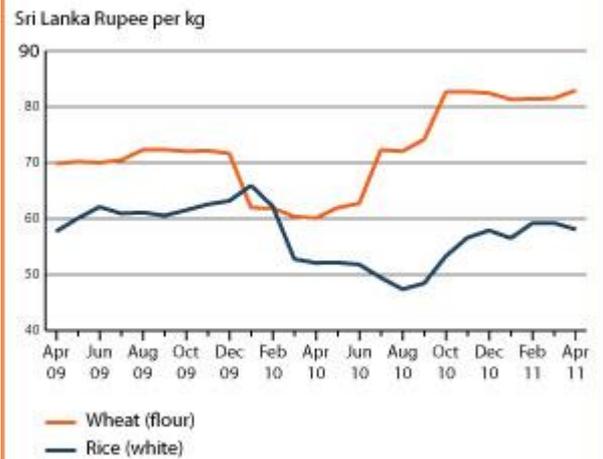
Total cereal imports



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

Sri Lanka

Retail prices of rice and wheat flour in Colombo



Source: Department of Census and Statistics

Reference Date: 1-February-2011

FOOD SECURITY SNAPSHOT

- Flood damage to paddy crop triggered a reduction of 15.5 percent in the *Maha* season crop forecast
- The reduced domestic production and rising international prices lead to a sharp rise in food prices in recent months.
- Over one million people have been affected by the floods in the east and central part of the country and require humanitarian assistance.

Forecast of the 2011 Maha season paddy crop revised downwards due to flood damage

Harvesting of the main season (*Maha*) paddy and maize crops is currently underway. Given the generally favourable rainfall and input supply situation during the growing season a bumper harvest of paddy was anticipated. However, heavy rains in December-January have caused severe flood damage in the eastern and central parts of the country. The Ministry of Agriculture has estimated damage to paddy crop at about 450 000 tonnes. Thus a revised forecast puts the *Maha*-2011 paddy production at 2.45 million tonnes, some 7 percent down from the previous year's *Maha* season. Damage to other crops has been much less. For example, maize harvest of the *Maha* season is expected to increase by 4 percent over the previous year.

The final estimate of paddy production for 2010 is 4.3 million tonnes, about 18 percent over the reduced harvest of 2009.

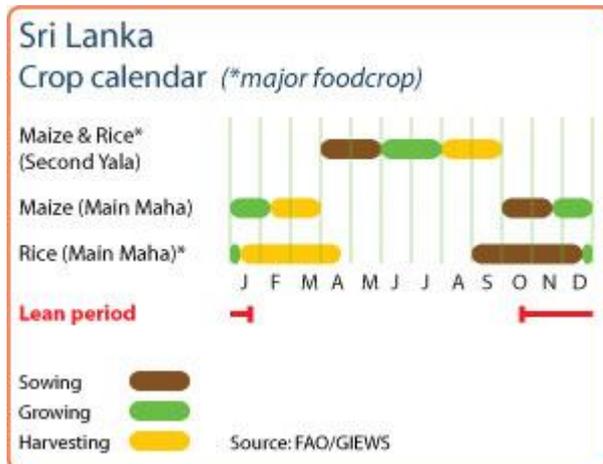
Wheat is not produced in the country. Import requirements in marketing year 2011 are estimated requirement at a normal level of some 1 million tonnes. In order to reduce dependence on imports the Government has increased import duties on wheat.

International price hikes lead to significant rise in wheat and rice prices

Given that the country is a net importer of both wheat and rice domestic prices are affected by the rising international prices. The increase of rice price has been also supported by production loss due to floods to the crop during last few months.

Overall food security situation has improved

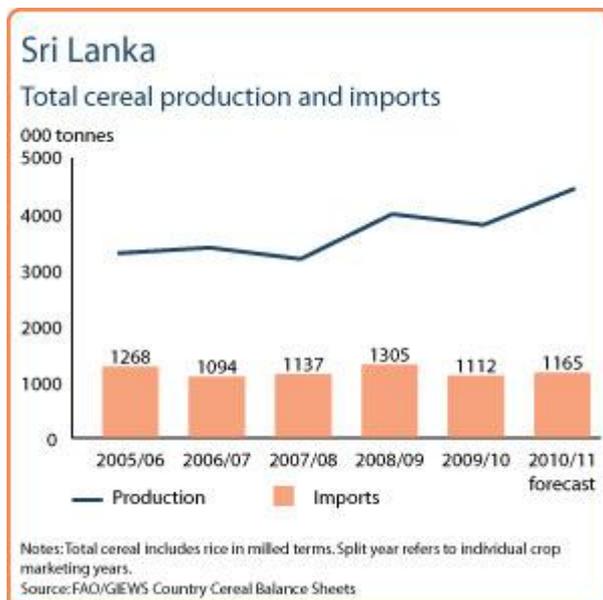
Food security situation has dramatically improved after the end of the 25-year old war between the Liberation Tigers of Tamil Eelam (LTTE) and the government forces in May 2009. Most of the IDP camps are now closed but some IDPs remain with host families. According to the Disaster Management Centre, as of 16 January 2011, the floods of past few months in the eastern and central parts of the country have affected over 1 million people. Various international appeals to mobilize humanitarian assistance are being launched.



Sri Lanka
Cereal production

	2005-2009 average	2009	2010 estimate	change 2010/2009
	000 tonnes			percent
Rice (paddy)	3449	3652	4301	18
Maize	80	144	144	0
Millet	6	6	6	0
Others	0	0	0	0
Total	3536	3802	4451	17

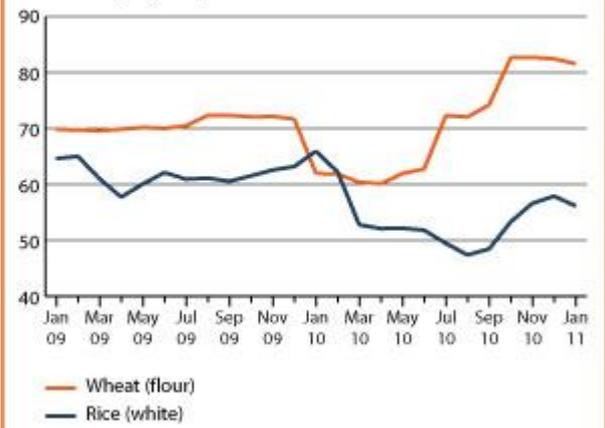
Notes: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Sri Lanka

Retail prices of rice and wheat flour in Colombo

Sri Lanka Rupee per kg



Source: Department of Census and Statistics

Reference Date: 2-September-2010

FOOD SECURITY SNAPSHOT

- Record harvest of 2010 paddy crop.
- Bumper harvest leads to significant drop in rice prices.
- Overall food security is improved.

Record harvest of the 2010 paddy crop

Harvesting of the second season (*Yala*) paddy and maize crops is currently underway. The official preliminary forecast puts the harvest of paddy at a bumper level of 1.6 million tonnes, some 27 percent over the previous year. The first season (*Maha*) paddy, harvested in March-April, is estimated at a record level of 2.65 million tonnes, 12 percent above the last year's reduced harvest. Much of the improvement in production is due to the increase in paddy cultivation area (highest ever) in response to higher farm gate prices, fertilizer subsidies and favourable weather conditions. With this level of production, very little if any, import of rice is expected. Since wheat is not produced in the country, the estimated requirement of some 1 million tonnes is all imported, mostly through commercial means.

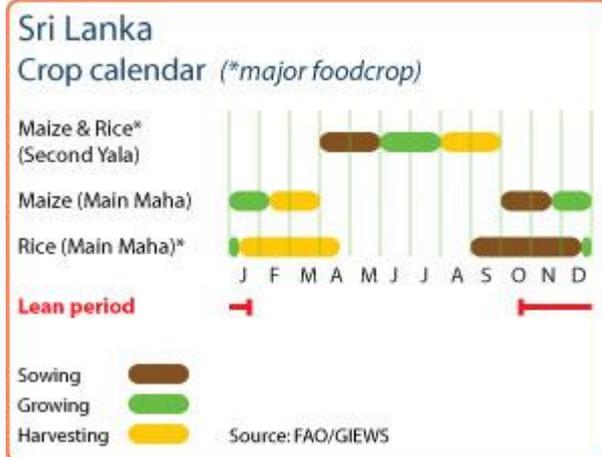
Bumper harvest leads to significant decline in rice prices

Owing to the estimated bumper paddy harvests in 2010 prices of rice (the main staple food) have come down significantly during past few months. The retail price of rice had been more or less stable for last two years around LKR 60 a kilo, up from about LKR 35 during 2007 before the soaring food prices crisis. Currently the price is about LKR 48. The downward pressure on prices also reflects Government's plans to cultivate over 40 000 hectares of fallow paddy land in the forthcoming Maha season.

Prices of wheat flour after a sharp decline in January have shot up in July following the Government's decision to reimpose an import duty of LKR 10 per kg on wheat grain imported to reduce consumption of flour and support rice prices in anticipation of the bumper Yala harvest.

Overall food security situation has improved

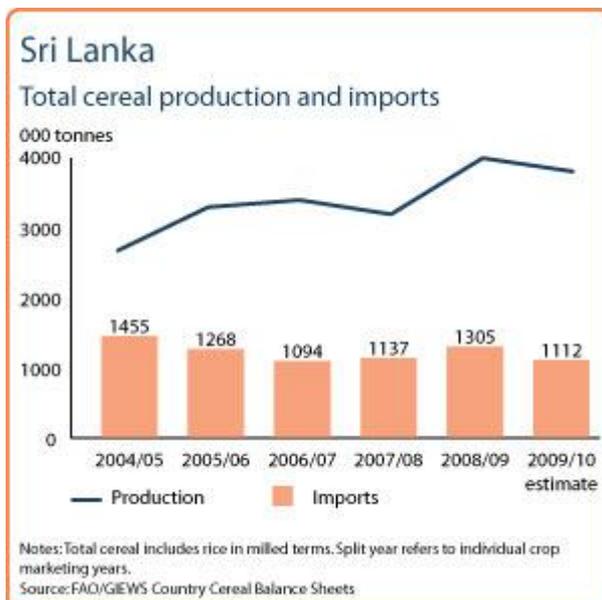
Security situation has dramatically improved after the end of the 25-year old war between the Liberation Tigers of Tamil Eelam (LTTE) and the government forces in May 2009. Reduced rice prices also will help improve food security in the country.



Sri Lanka
Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Rice (paddy)	3449	3652	4250	16
Maize	80	144	144	0
Millet	6	6	6	0
Others	0	0	0	0
Total	3536	3802	4400	16

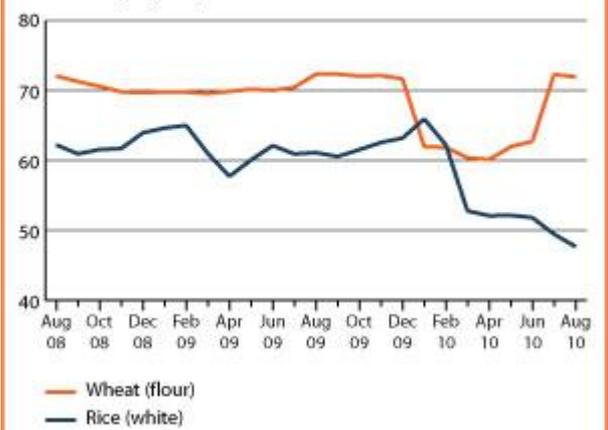
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Sri Lanka

Selected retail cereal prices in Colombo

Sri Lanka Rupee per kg



Source: Department of Census and Statistics

Reference Date: 20-May-2010

FOOD SECURITY SNAPSHOT

- Record harvest of 2010 main *Maha* season paddy crop anticipated.
- The current retail prices of rice and wheat have come down significantly but still remain higher than the pre-food prices crisis levels of 2007.
- Overall security is improved as resettlement of IDPs progresses.

Record harvest of the 2010 main season paddy crop forecast

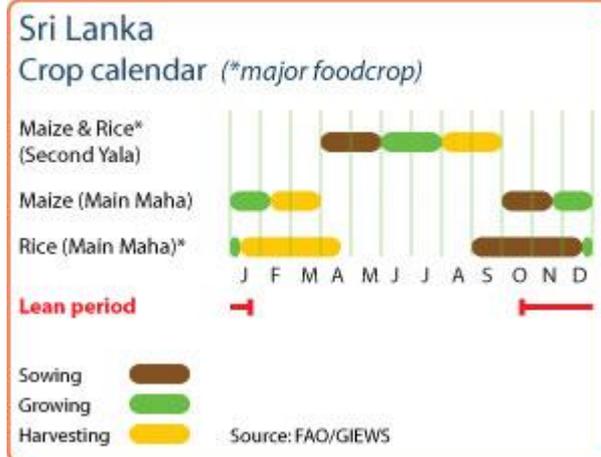
Harvesting of the first season (*Maha*) paddy was completed in March. The official forecast indicates production of paddy for this season at a record level of 2.59 million tonnes, 9 percent above the last year's reduced harvest. Much of the improvement in production is due to the increase in paddy cultivation area (highest ever) in response to higher farm gate prices, fertilizer subsidies and favourable weather conditions. Assuming normal secondary *Yala* season later in the year, FAO preliminarily forecasts the 2010 total paddy harvest at a record level of 4 million tonnes. With this level of production, very little if any, import of rice is expected. Since wheat is not produced in the country, the estimated requirement of some 1 million tonnes is all imported, mostly through commercial means.

Prices of staple food decline with the good rice harvest but still remain high

Owing to the anticipated bumper paddy harvest prices of rice (the main staple food) have come down significantly during past few months. The retail price of rice has been more or less stable for last two years around LKR 60 a kilo up from about LKR 35 during 2007 before the soaring food prices crisis. Currently the price is about LKR 52. Prices of wheat flour have also come down in recent months partly following the trend in the international price.

Security situation is improved as resettlement of IDPs progresses

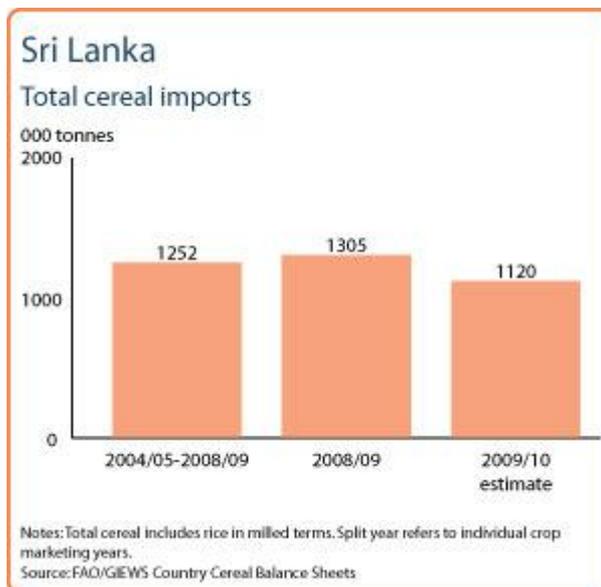
Security situation has dramatically improved after the end of the 25-year old war between the Liberation Tigers of Tamil Eelam (LTTE) and the government forces in May 2009. According to the official statements, as of 15 April 2010, about 83 000 IDPs are still in temporary camps in Vavuniya, Mannar, and Jaffna districts. Despite the bumper harvests at the national level, food insecurity persists in the northern and eastern war-affected areas and the resettlement of IDPs and recovery of the productive systems continues.



Sri Lanka
Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Rice (paddy)	3449	3652	4000	10
Maize	79	144	144	0
Millet	6	6	6	0
Total	3533	3802	4150	9

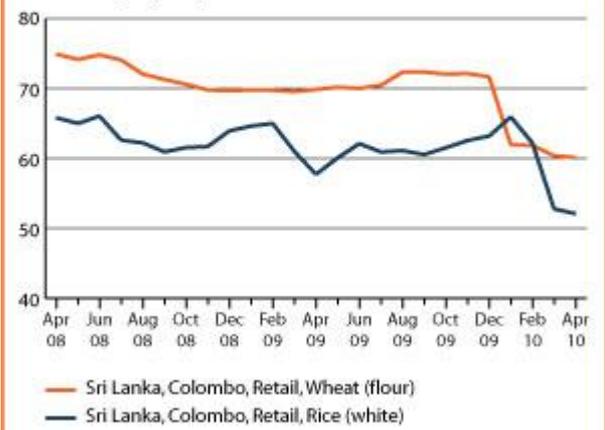
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Sri Lanka

Selected cereal prices and international rice price

Sri Lanka Rupee per kg



Source: Department of Census and Statistics

Reference Date: 7-January-2010

FOOD SECURITY SNAPSHOT

- Despite relatively poor Yala season, the 2009 annual rice output is estimated to be above average.
- The current retail prices of rice and wheat remain higher than the pre- food prices crisis levels of 2007.
- Overall security is improved as resettlement of IDPs progresses.

Poor rainfall reduces harvest of the second season, Yala 2009

Harvesting of the second season (*Yala*) paddy rice started in July and has recently been completed by September/October. The official final estimate puts paddy production for this season at 1.268 million tonnes, 28 percent below the last year's government estimated bumper harvest but 11 percent above the previous five year-average. Rice production in 2009, including the harvest of the main *Maha* 2008/09 season is estimated at 2.49 million tonnes of milled rice. This is about 5.5 percent below the last year's record harvest but 13 percent above the average of the previous five years. Since wheat is not produced in the country, the estimated requirement of some 1 million tonnes is all imported mostly through commercial means.

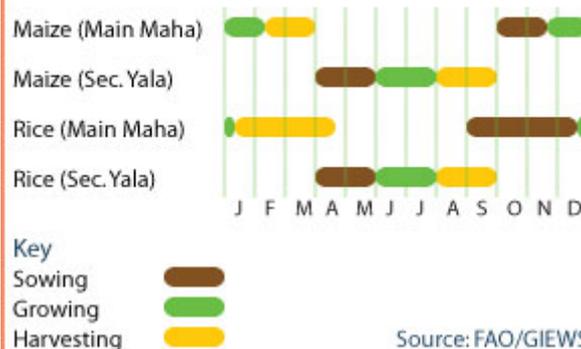
Prices of staple food remain stable but high

Prices of rice (the main staple food), and wheat flour remain high but stable since the beginning of 2008. Rice price in Colombo, for example has followed the Thailand export price for last three years, except that Sri Lanka managed to avoid the sharp upward spike in prices that occurred in international price around May 2008. Government imports and subsidised rice policy may have played a role in this. The retail price of rice has been more or less stable for last two years around 60 rupees a kilo up from about 35 rupees during 2007 before the soaring food prices crisis.

Security situation is improved as resettlement of IDPs progresses

Security situation has dramatically improved after the end of the 25-year old war between the Liberation Tigers of Tamil Eelam (LTTE) and the government forces in May 2009. Of the 300 000 refugees in various camps, as of early December, some 158 000 were released. Despite the above average food supply at the national level, food insecurity exists in the northern and eastern war-affected areas of the country as the resettlement of IDPs and recovery of the productive systems are moving slowly. High food prices have contributed to food insecurity for the population with low income levels. FAO is planning contributions to the recovery of productive systems, including for IDP resettlement.

Crop calendar Sri Lanka

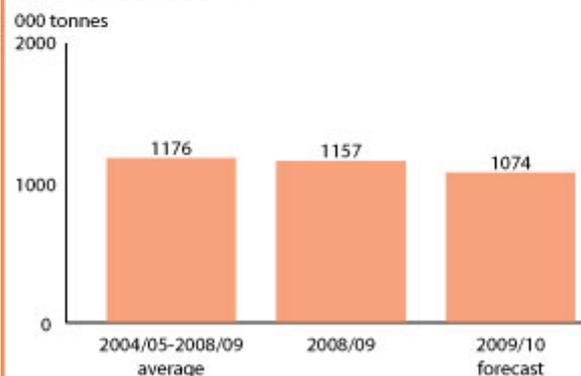


Sri Lanka Cereal production

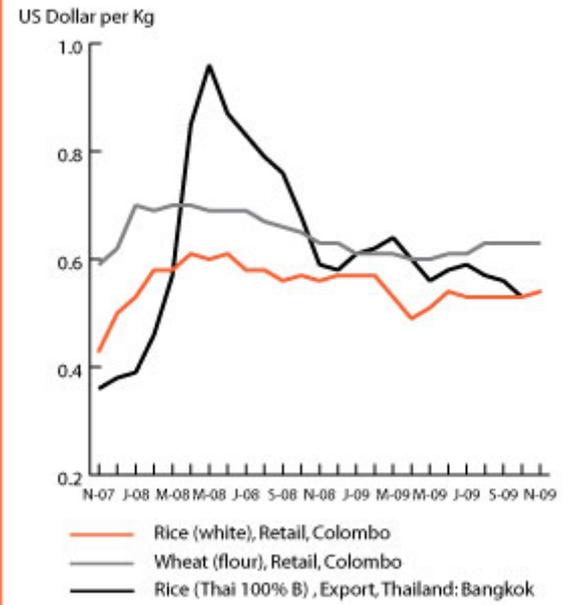
	2004-2008 average	2008	2009 forecast	change 2009/2008
	000 tonnes			percent
Rice (in milled terms)	2206	2635	2458	-7
Maize	57	112	144	29
Millet	5	5	6	20
Others	0	0	0	0
Total	2268	2752	2608	-5

Note: percentage change calculated from unrounded data.

Total Cereals imports



Sri Lanka Selected domestic and international prices



Source: Department of Census and Statistics; Jackson Son and Co. (London) Ltd.

Reference Date: 1-October-2009

FOOD SECURITY SNAPSHOT

- Despite relatively poor Yala season, the 2009 annual rice output is estimated to be above average.
- The current retail prices of rice and wheat remain higher than the soaring food prices of the pre-crisis levels of 2007.
- Overall security is improved but the problems of resettlement of IDPs and the recovery of the war-torn areas remain.

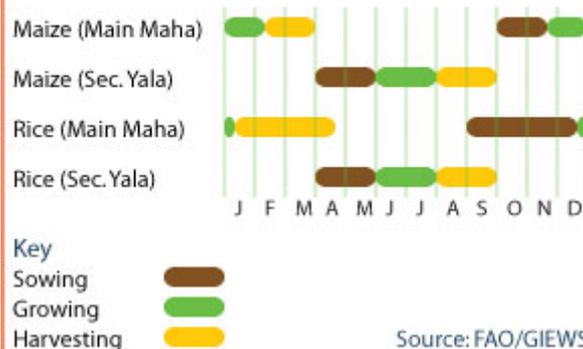
Poor rainfall reduces harvest of the secondary Yala 2009 season

Harvesting of the secondary season (*Yala*) paddy rice started in July and has recently been completed by the end of this month. The official forecast puts paddy production for this season at 1.32 million tonnes, 25 percent below the last year's government estimated bumper harvest but 13 percent above the previous five year-average. Rice production in 2009, including the harvest of the main *Maha* 2008/09 season is forecast at 2.49 million tonnes of milled rice. This is about 5.5 percent below the last year's record harvest but 13 percent above the average of the previous five years. Since wheat is not produced in the country, the estimated requirement of some 1 million tonnes is all imported mostly through commercial means.

Prices of staple food remain high

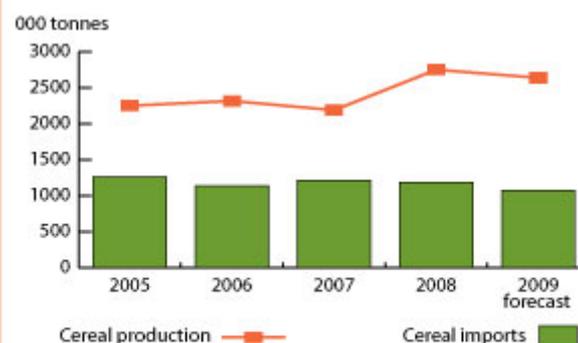
Prices of rice (the main staple food), and wheat flour remain high but stable since the beginning of 2008. Rice price in Colombo, for example has followed the Thailand export price for last three years, except that Sri Lanka managed to avoid the sharp upward spike in prices that occurred in international price around May 2008. Government imports and subsidised rice policy may have played a role in this. The latest available monthly price for September 2009 for rice in US dollar terms is 60 percent higher than the same price 24-months before. Similarly the international price is up by 70 percent during this same period.

Crop calendar Sri Lanka



Cereal production and imports Sri Lanka

Cereal production	2004-2008	2008	2009	change 2009/2008
	average		forecast	
	000 tonnes			percent
Rice (milled)	2206	2635	2490	-5.5%
Maize	57	113	144	27.4%
Millet	5	5	6	20%
Total Cereals	2269	2753	2640	-4.1%



Source: FAO/GIEWS Country Cereal Balance Sheets

Security situation is improved but the problem of resettlement of IDPs remains

Security situation has dramatically improved after the end of the 25-year old war between the Liberation Tigers of Tamil Eelam (LTTE) and the government forces in May 2009. However, about 300 000 refugees are still in the government-run camps. Despite the above average food supply at the national level, food insecurity exists in the northern and eastern war-affected areas of the country as the resettlement of IDPs and recovery of the productive systems are moving slowly. High food prices have contributed to food insecurity for the population with low income levels. FAO is planning contributions to the recovery of productive systems, including for IDP resettlement.

