



GIEWS Country Brief Mongolia

Reference Date: 22-September-2023

FOOD SECURITY SNAPSHOT

- Above-average wheat production officially forecast in 2023
- Cereal import requirements in 2023/24 estimated below average
- Prices of wheat flour at record levels in July 2023

Above-average wheat production officially forecast in 2023

Harvesting of the 2023 wheat crop, mostly irrigated, is expected to finalize by end-September and production is officially forecast at an above-average level of 472 000 tonnes. The bumper output is attributed to the large area sown, driven by record high domestic prices at planting time and robust local demand. In the Central Region, where about 80 percent of wheat is grown, yields are forecast at average to above-average levels due to favourable weather conditions and ample supply of irrigation water. In the minor cereal producing provinces of Uvs, Khovd and Bayan-Ölgii in Western Region, poor rainfall between June and August affected crops at flowering and grain-filling stages, and yields are expected at a below-average level.

The 2023 output of other crops, including potatoes, oats and buckwheat, is forecast at average to above-average levels, reflecting high levels of plantings supported by strong local demand and above-average yields due to favourable weather conditions.

Cereal import requirements in 2023/24 estimated below average

Cereal import requirements in the 2023/24 marketing year (October/September), mostly wheat, are forecast at a below-average level of 156 000 tonnes, reflecting the expected bumper domestic production. For the 2023 calendar year, import requirements of rice, which is not produced domestically, are estimated at a near-average level of 50 000 tonnes.

Prices of wheat flour at record levels in July 2023

Prices of wheat flour, a key staple food, have steadily increased since July 2022 and they were at record levels in August 2023, ranging between 45 and 65 percent higher than their year-earlier levels. The high level of prices mostly reflects the elevated production and transport costs as well as the significant

Mongolia

Crop Calendar

(*major foodcrop)

Wheat* and barley



Lean period

Sowing

Growing

Harvesting

Mongolia

Cereal Production

	2018-2022	2022	2023	change
	average		forecast	2023/2022
000 tonnes				
Wheat	443	394	472	19.9
Oats	12	11	13	18.2
Barley	4	4	4	0.0
Others	1	1	1	0.0
Total	460	410	490	19.6

Note: Percentage change calculated from unrounded data.

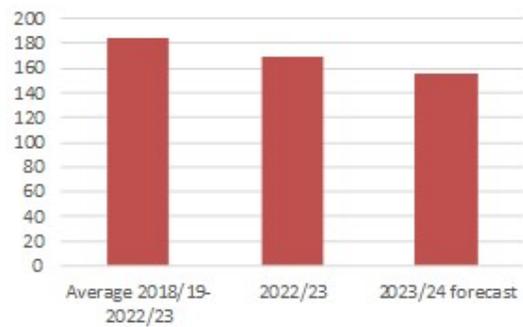
depreciation of the national currency, which made imports more expensive. During 2022, the tugrik depreciated steadily against the US dollar, losing 20 percent of its value, and it has remained relatively stable at low levels in 2023.

Prices of beef and mutton meat, other important staple foods, declined seasonally in July and August 2023 as a result of improved market availability linked to increased livestock sales ahead of the winter. However, prices remained well above their values a year earlier as seasonal increases between January and June 2023 were compounded by the elevated costs of feed. Strong demand from China (mainland), the country's main meat importer, also supported prices.

Mongolia

Cereals Imports

000 tonnes

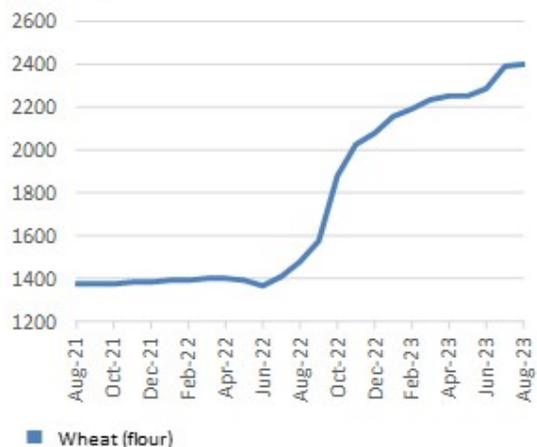


Notes: Includes rice in milled terms. Split years refer to individual crop marketing years (for rice, calendar year of second year shown).

Mongolia

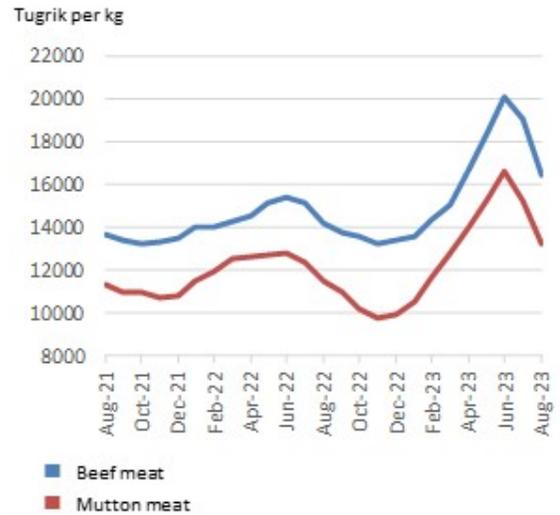
Wheat flour prices in Ulaanbaatar

Tugrik per kg



Mongolia

Selected retail meat prices in Ulaanbaatar



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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/>.



GIEWS Country Brief Mongolia

Reference Date: 11-March-2022

FOOD SECURITY SNAPSHOT

- Bumper wheat production obtained in 2021
- Cereal import requirements in 2021/22 forecast well below average level
- Prices of beef and mutton seasonally increase since November 2021

Bumper wheat production obtained in 2021

Harvesting of the 2021 wheat crop, mostly irrigated, finalized last September and production is officially estimated at a bumper level of 566 000 tonnes. The area planted is estimated at a well above-average level, sustained by the strong local demand and public support to wheat producers aiming to increase local production and prevent shortages of wheat flour amid the COVID-19 pandemic. Support was provided through the distribution of agricultural inputs at subsidized prices, including fuel, fertilizers and pesticides. In most cropping areas, yields reached well above-average levels due to generally favourable weather conditions, adequate irrigation water supplies and ample use of high-yielding seed varieties and agricultural chemicals.

Land preparation and planting of the 2022 wheat crop will start in April. The adequate availability of water for irrigation and the support by official programmes promoting wheat production are expected to keep the planted area above the average levels.

Cereal import requirements in 2021/22 forecast well below average level

The country is almost self-sufficient in wheat. Recently, large volumes of wheat have been imported in 2015 and 2017, when crops were affected by severe droughts. In the 2021/22 marketing year (October/September), wheat import requirements are forecast at 50 000 tonnes, accounting for about one-third of the average level, reflecting the bumper domestic production. Similarly, imports of millet, barley, oats and rye in the 2021/22 marketing year are forecast below the five-year average. In the 2022 calendar year, imports of rice, which is not produced domestically, are anticipated at a near-average level of 25 000 tonnes.

Prices of beef and mutton meat seasonally increase since November 2021

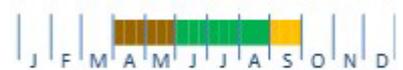
Prices of beef and mutton meat, the country's main staple food, increased seasonally since November 2021, reflecting low

Mongolia

Crop Calendar

(*major foodcrop)

Wheat* & Barley



lean period



Source: FAO/GIEWS, FAO/WFP CFSAM 2007.

Mongolia

Cereal Production

	2016-2020	2020	2021	change
	average	000 tonnes		2021/2020
			estimate	percent
Wheat	390	406	566	39.4
Oats	10	13	15	15.4
Barley	4	5	6	20.0
Others	1	1	1	0.0
Total	404	425	588	38.4

Note: Percentage change calculated from unrounded data.

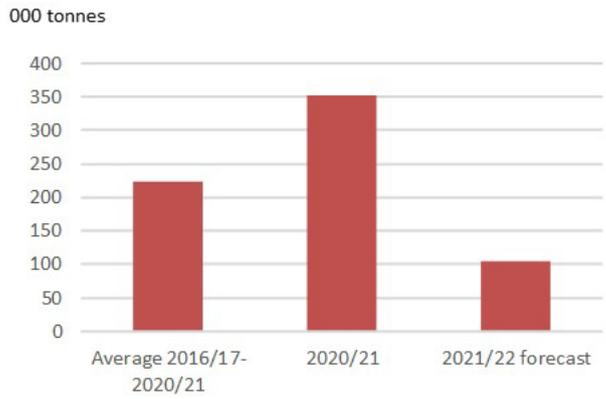
Source: FAO/GIEWS Country Cereal Balance Sheet.

market availabilities due to reduced livestock sales. Herders tend to sell most of their animals between July and November, when livestock usually reaches the best body conditions after grazing on summer and autumn pasture. Livestock availabilities in the markets steadily decreases between November and June, resulting in price increases.

Wheat flour prices remained generally stable since April 2021 due to ample market availabilities from above-average imports and the bumper production harvested in 2021.

Mongolia

Cereals Imports

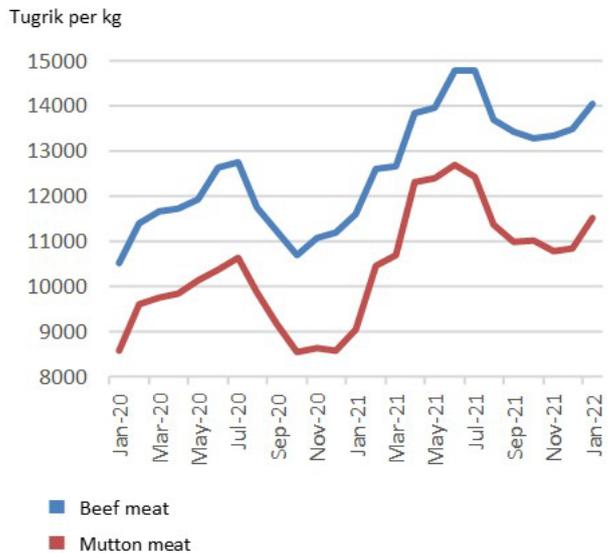


Notes: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Mongolia

Selected retail meat prices in Ulaanbaatar

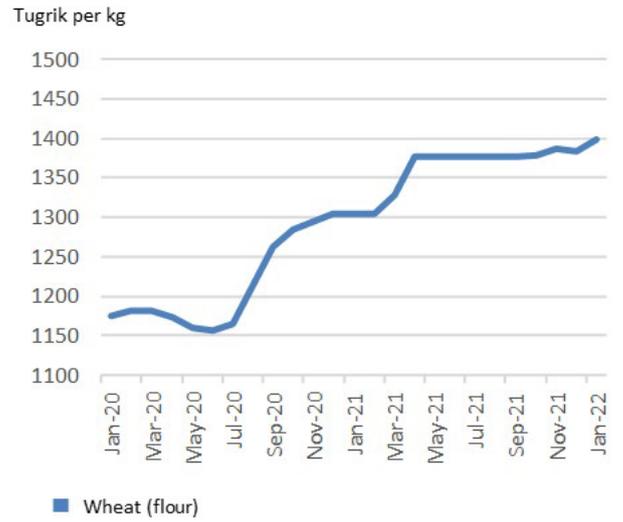


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Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

Mongolia

Wheat flour prices in Ulaanbaatar



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



GIEWS Country Brief Mongolia

Reference Date: 21-December-2020

FOOD SECURITY SNAPSHOT

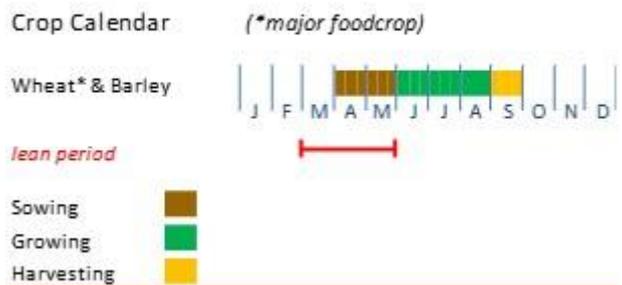
- **Wheat output in 2020 officially estimated at above-average level**
- **Above-average cereal import requirements in 2020/21**
- **Below-average rains had negative impact on pasture conditions in southern, western and parts of central areas of country**
- **Prices of beef and mutton decreasing from July 2020 onwards**
- **Food insecurity concerns exist in areas where dry weather conditions affected availability of pasture for livestock, rising concerns over a possible “dzud” event**

Wheat output in 2020 officially estimated at above-average level

Harvesting of the 2020 wheat crop, mostly irrigated, was completed at the end of September and production is officially estimated at an above-average level of 408 000 tonnes. The above-average output is due to the large area planted, sustained by strong local demand and official programmes promoting wheat production. In particular, the Government decided to scale up the support to wheat producers in 2020 aiming to increase local production and prevent shortages of wheat flour during the COVID-19 pandemic. The support was provided through the distribution at subsidized prices of agricultural inputs, including equipment, fuel, fertilizers and pesticides. Generally favourable weather conditions and adequate irrigation water supplies boosted yield productivity in the main wheat producing provinces of Selenge and Tuv in Khangai Region and in the provinces of Bulgan, Orkhon and Khuvsgul in the Central Region. Damages to standing crops were reported in the minor wheat producing areas located in parts of Western and Eastern regions and southern parts of Khagai Region due to erratic precipitations during the cropping season. An early snowfall in October hampered harvesting operations, leaving a minor area of about 16 000 hectares (which is about 5 percent of the total area planted with wheat) inaccessible for harvest.

The 2020 output of other crops, including potatoes, barley, oats, millet and buckwheat, is estimated above the previous five-year average, reflecting high levels of plantings supported by strong local demand and above-average yields due to favourable weather conditions.

Mongolia



Source: FAO/GIEWS, FAO/WFP CFSAM 2007.

Mongolia

Cereal Production

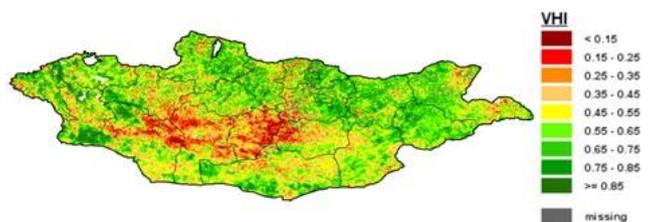
	2015-2019	2019	2020	change
	average		estimate	2020/2019
	000 tonnes			percent
Wheat	350	411	408	-0.8
Oats	8	13	13	-2.0
Barley	3	3	5	99.1
Others	1	1	1	27.5
Total	361	428	427	-0.2

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Mongolia - Vegetation Health Index (VHI)

July 2020



Source: FAO/GIEWS Earth Observation System.

Above-average cereal import requirements in 2020/21

The country is almost self-sufficient in wheat and imports large quantities only when local production is not insufficient to cover the domestic needs as in 2015 and 2017 when crops were affected by severe droughts. In the 2020/21 marketing year (October/September), wheat import requirements are forecast at an above-average level 190 000 tonnes, despite a good domestic production. This reflects official plans to increase wheat imports in order to ensure adequate domestic availabilities and food security amid concerns over the impact of the COVID-19 pandemic. In 2020, imports of rice, which is not produced domestically, are anticipated at a near-average level of 25 000 tonnes. Similarly, imports of millet, barley, oats and rye in the 2020/21 marketing year are forecast close to the five-year average.

Below-average rains in southern, western and parts of central areas of country had negative impact on pasture conditions

Rainfall amounts over southern, western and parts of central areas of the country were below average throughout most of 2020 causing a severe deterioration of pastures and rangeland conditions (see VHI map). Limited pasture availability in these areas prevented livestock to gain fat and strengthen their core muscles, critical to overcome the normally harsh winter/spring months. Drought reduced hay and fodder availabilities, coupled with weak livestock conditions, significantly increase the risks of high mortality rate of animals for the forthcoming cold period. The event when an unusually high number of animals perish during the winter/spring months, which normally follows a summer drought, is locally called “dzud”. According to recent official information, as of 10 December 2020, large areas of Bayankhongor, Uvurkhangai, Omnogovi provinces (locally known as aimags) as well as the northern parts of Dundgovi, eastern part of Govi-Altai and southwestern part of Tuv provinces are at the extreme risk of experiencing a “dzud” event. In addition, large areas Khovd, Zavkhan, Gobi-Altai, Arkhangai, Tuv and Sukhbaatar provinces, as well as southern and northern parts of Omnogovi provinces are at high risk of experiencing a “dzud” event (see Dzud Risk Map).

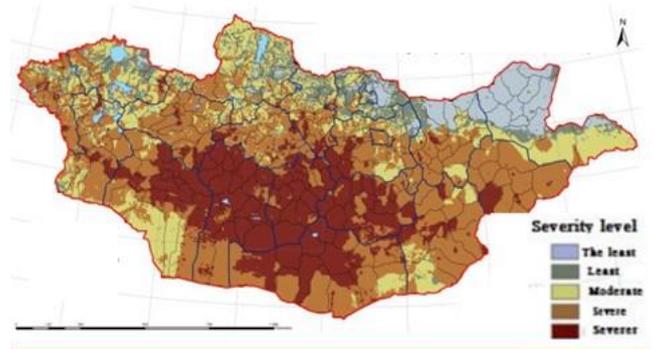
Prices of beef and mutton meat decreasing from July 2020 onwards

Prices of beef and mutton meat, the country's main staple food, decreased seasonally from July 2020 onwards, reflecting high market availabilities due to increased livestock sales ahead of the winter. Prices of meat are usually at their lowest levels during October-December and at their highest levels between May and July.

Food insecurity concerns exist in areas where dry weather conditions affected availability of pasture for livestock, rising concerns over possible “dzud” event

A possible “dzud” event may deteriorate sharply the food security situation of large numbers of people, as about 70 percent of Mongolia's rural population rely on rangeland-based livestock herding. As past events have demonstrated, the loss of livestock assets is likely to determine large migration movements into

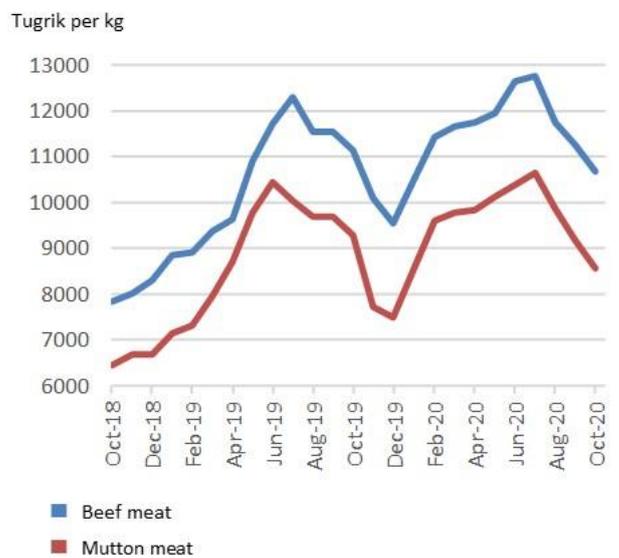
Mongolia - Dzud risk map, 2020-2021



Source: Information and research institute of Meteorology, Hydrology and Environment (RIMHE)

Mongolia

Selected retail meat prices in Ulaanbaatar



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

urban areas in search for economic support. Migratory groups often settle in suburban areas of capital, Ulaanbaatar, known as “ger”, where there are virtually no infrastructures and public services, and face food security issues, particularly during the winter periods.

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GIEWS Country Brief Mongolia

Reference Date: 27-April-2020

FOOD SECURITY SNAPSHOT

- Plantings of 2020 wheat crop expected at above-average level, driven by strong demand and public incentives
- Wheat production in 2019 estimated at above-average level
- Cereal import requirements in 2019/20 forecast close to average levels
- Prices of beef and mutton increased sharply since last December and at high levels in March

Above-average plantings of 2020 wheat crop, driven by strong demand and public incentives

Land preparation and early planting of the 2020 wheat crop, to be harvested in September, are progressing at a normal pace supported by favourable weather conditions and ample supplies of irrigation water. Strong local demand, together with official programmes promoting wheat production, are expected to keep the area planted close to the previous year's above-average level. In addition, in March the Government announced plans to support wheat producers amid the COVID-19 pandemic through the distribution at subsidized prices of agricultural inputs, including equipment, fuel, fertilizers and pesticides.

Wheat production in 2019 estimated at above-average level

The 2019 wheat production is officially estimated at 407 000 tonnes, 15 percent higher than the five-year average. Strong local demand and the State's support ensured above-average plantings, while generally favourable weather conditions and adequate supply of agricultural inputs boosted yield productivity. Localized damages to standing crops were reported in the main producing northern provinces (locally called aimags) of Tov, Selenge and Khentii due to unseasonably heavy rains in August.

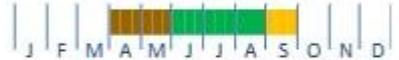
The 2019 output of other crops, including potatoes, barley, oats and buckwheat, is estimated at near-average levels, supported by favourable weather conditions.

Mongolia

Crop Calendar

(*major foodcrop)

Wheat* & Barley



lean period

Sowing

Growing

Harvesting

Source: FAO/GIEWS, FAO/WFP CFSAM 2007.

Mongolia

Cereal Production

	2014-2018 average	2018	2019 estimate	change 2019/2018
	000 tonnes			percent
Wheat	364	429	407	-5.0
Oats	9	8	8	0.0
Barley	6	7	7	0.0
Total	379	443	422	-4.8

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Cereal import requirements in 2019/20 forecast close to average levels

In the 2019/20 marketing year (October/September), cereal import requirements, mostly wheat, are forecast at a near-average level of 165 000 tonnes. Generally the country is almost self-sufficient in wheat and normally imports small quantities to cover the gap between local production and domestic demand. However, severe droughts in 2015 and 2017 severely affected local production, leading to unusual high imports, with the five-year average standing at 145 000 tonnes. FAO's forecast for the import requirements of wheat for the 2019/20 marketing year has been revised upward to 130 000 tonnes, to reflect the Government's intentions to import an additional 100 000 tonnes of wheat to ensure adequate market availabilities in response to the COVID-19 outbreak.

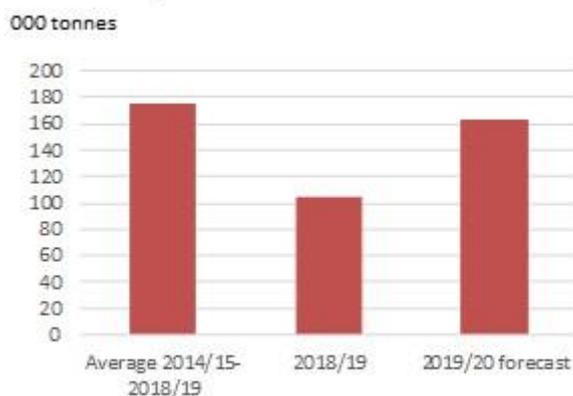
In 2020, imports of rice, which is not produced domestically, are anticipated at a near-average level of 25 000 tonnes. In addition to wheat and rice, small quantities of millet, barley, oats and rye are also annually imported.

Prices of beef and mutton meat at high levels in March

Prices of beef and mutton meat increased seasonally since December 2019 and, in March 2020 they were between 10 and 35 percent higher than the level of one year earlier. The high level is the result of tight market availabilities due to the reduced sales of livestock after the autumn as well as the strong demand by China (Mainland), the country's main meat importer. Since the beginning of 2019, China (Mainland) has increased imports of all meat categories, including beef, mutton and chicken, due to domestic tightness caused by the African Swine Fever epidemic, which is estimated to have killed at least 1.2 million domestic pigs.

Mongolia

Cereals Imports

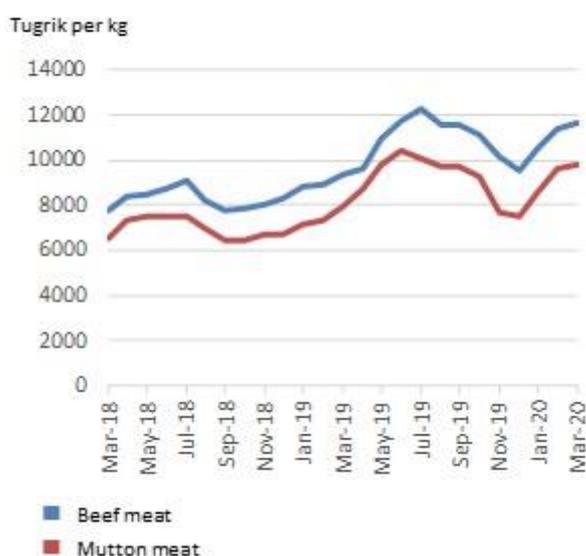


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Mongolia

Selected retail meat prices in Ulaanbaatar



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

COVID-19 and measures adopted by the Government

On 13 February 2020, the Government declared a state of high alert and implemented measures to restrict the spread of the COVID-19 virus, including travel restrictions, social distancing, cancellation of public events and closure of universities and schools. The Government is planning to import 100 000 tonnes of wheat throughout 2020 in order to ensure adequate market supplies. In addition, the Government will grant a loan totalling MNT 300 billion (USD 107.7 million) at a 3-percent interest rate to national cashmere companies for the purchasing of at least 30 percent of all combed cashmere from herders. On 27 March 2020, the Cabinet has proposed a support plan, still pending approval by the Parliament, to support vulnerable households, including the increase of child allowance and unemployment benefits.

Due to the global COVID-19 pandemic, a serious shortfall of fruits and vegetables is expected, as the country relies on imports to cover domestic demand. In an attempt to ensure future vegetables supplies, the Government has been implementing measures to increase the area planted with vegetables.

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GIEWS Country Brief Mongolia

Reference Date: 13-February-2019

FOOD SECURITY SNAPSHOT

- Above-average cereal production gathered in 2018
- Cereal import requirements in 2018/19 forecast at average level
- Prices of beef and mutton increased seasonally since October

Above-average cereal production gathered in 2018

The 2018 cropping season finalized in September last year.

Latest official estimates put the 2018 wheat output at 428 600 tonnes, a significant increase compared to the drought-reduced level of 2017 and 25 percent higher than the five-year average. The bumper output in 2018 is the result of above-average plantings, sustained by strong local demand and high yields due to temporally and spatially well-distributed rains during the cropping season. The wheat crop is produced by large-scale farms operating either through cooperatives, companies or as a household activity.

The 2018 output of other crops, including potatoes, barley, oats and buckwheat, is estimated at near-average levels, supported by beneficial weather conditions.

Cereal import requirements in 2018/19 forecast at average level

In the 2018/19 marketing year (October/September), cereal import requirements, mostly wheat, are forecast at an average of 154 000 tonnes, with a strong decrease from the previous year's unusual high level due to ample supplies from the 2018 bumper output. Imports of rice in 2019, which is not produced domestically, are anticipated at a near average level of 25 000 tonnes. In addition to wheat and rice, small quantities of millet, barley, oat and rye are also annually imported.

Prices of beef and mutton meat increased seasonally since October

Prices of beef and mutton meat increased seasonally since October 2018, reflecting lower market availabilities due to reduced livestock sales after the winter. Overall, beef and mutton

Mongolia

Crop Calendar

(*major foodcrop)

Wheat* & Barley



lean period

Sowing
Growing
Harvesting

Source: FAO/GIEWS, FAO/WFP CFSAM 2007.

Mongolia

Cereal Production

	2013-2017 average	2017	2018 estimate	change 2018/2017
	000 tonnes			percent
Wheat	352	231	429	85.8
Oats	10	8	8	0.0
Barley	6	6	7	8.3
Total	367	245	443	81.1

Note: percentage change calculated from unrounded data.

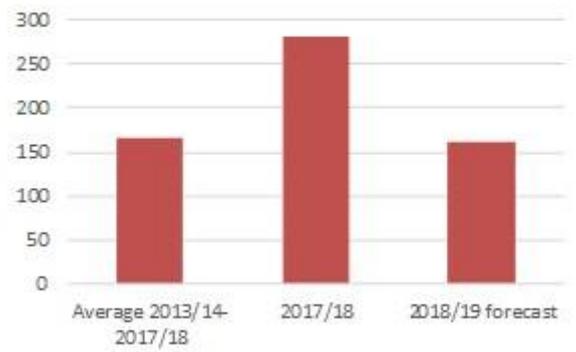
Source: FAO/GIEWS Country Cereal Balance Sheet.

prices were higher than their year earlier levels. Prices of meat are usually at their lowest levels during October-December and at their highest levels between May and July.

Mongolia

Cereals Imports

000 tonnes



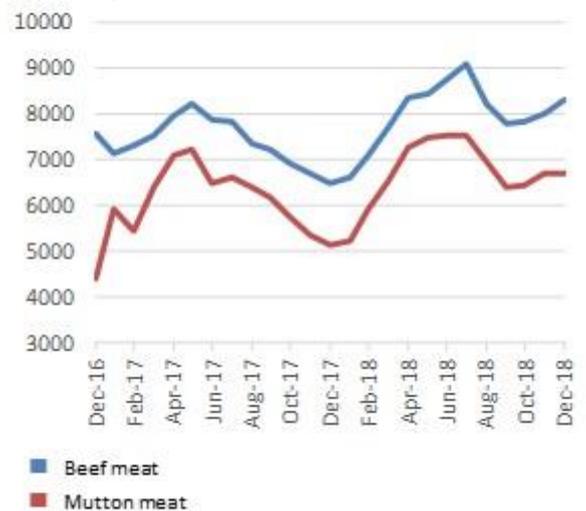
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Mongolia

Selected retail meat prices in Ulaanbaatar

Tugrik per kg



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



GIEWS Country Brief Mongolia

Reference Date: 03-October-2018

FOOD SECURITY SNAPSHOT

- Above-average cereal production gathered in 2018
- Cereal import requirements in 2018/19 forecast at average level
- Harsh winter caused severe livestock losses at localized level
- Prices of beef and mutton decrease seasonally in August

Above-average cereal production gathered in 2018

Harvesting of the 2018 cereal crops, mostly wheat, was completed at the end of September.

Latest official estimates put the 2018 wheat output at 426 000 tonnes, a significant increase compared to the drought-reduced level of 2017 and 21 percent higher than the five year-average. The bumper output in 2018 is the result of above-average plantings, sustained by strong local demand and above-average yields, following well-distributed rains both temporally and spatially during the cropping season. The wheat crop is essentially produced by large-scale farms operating either through cooperatives, companies or as a household activity.

The 2018 output of other crops, including potatoes, barley, oats and buckwheat, is also estimated at well above-average levels, supported by beneficial weather conditions.

Cereal import requirements in 2018/19 forecast at average level

Wheat and rice are the two main imported cereals, mostly purchased from the Russian Federation and Kazakhstan. Cereal import requirements in the 2018/19 marketing year (October/September) are forecast at 154 000 tonnes, a strong decrease from the previous year's unusual high level and a return to average level, reflecting ample supplies from the 2018 bumper output. Imports of rice in 2018, which is not produced domestically, are anticipated to remain close to the previous year's near-average level of 25 000 tonnes.

Harsh winter caused severe livestock losses at localized level

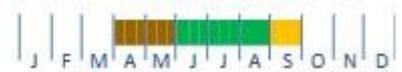
According to official estimates, as of June 2018, nearly 2.2 million livestock was lost, mostly due to the extreme cold weather

Mongolia

Crop Calendar

(*major foodcrop)

Wheat* & Barley



lean period

Sowing

Growing

Harvesting

Source: FAO/GIEWS, FAO/WFP CFSAM 2007.

Mongolia

Cereal Production

	2013-2017	2017	2018	change
	average		estimate	2018/2017
000 tonnes				
Wheat	352	231	426	84.6
Oats	10	8	8	0.0
Barley	6	6	6	0.0
Total	367	245	440	79.8

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

conditions during the winter and spring months. The overall death toll accounts for about 4 percent of the total livestock population and falls under the country's normal mortality rate. The *aimags* which recorded the highest losses were Bayankhongor, Uvurkhangai, Arkhangai, Zavkhan, Khovd, Tuv, Gobi-Altai and Khentii. Herder households who lost large numbers of their livestock faced a reduction of income, with ensuing constraints to access food and non-food items.

Prices of beef and mutton meat decreased seasonally in August

Prices of beef and mutton meat decreased seasonally in August, reflecting improved market availabilities due to increased livestock sales ahead of the winter. Overall, beef and mutton prices were generally higher than their year earlier levels. They registered sharp seasonal increases since the beginning of the year, mostly reflecting increased livestock losses during the winter and spring months. Prices of meat are usually at their lowest levels during October-December and at their highest levels between May and July.

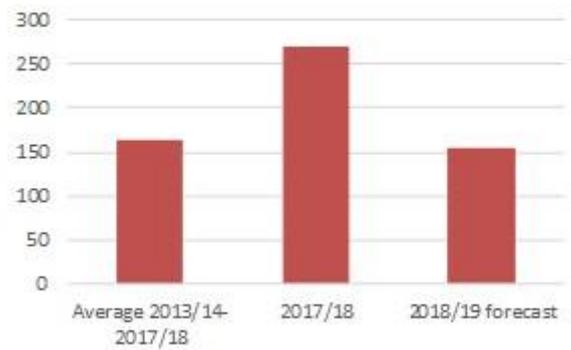
Prices of wheat flour have remained stable in recent months and, in August 2018, they were close to their year-earlier levels, reflecting adequate market availabilities.

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Mongolia

Cereals Imports

000 tonnes



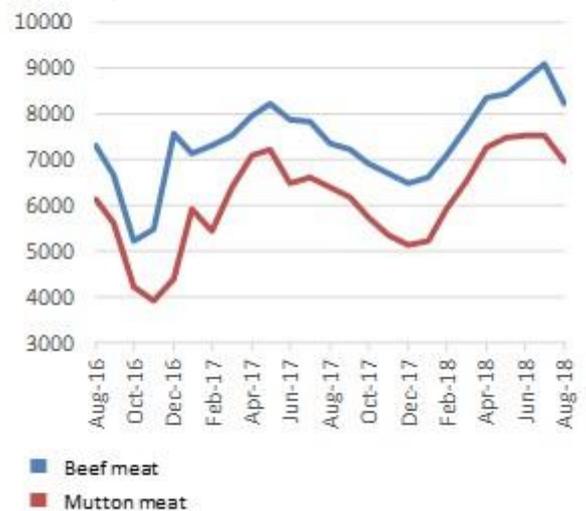
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Mongolia

Selected retail meat prices in Ulaanbaatar

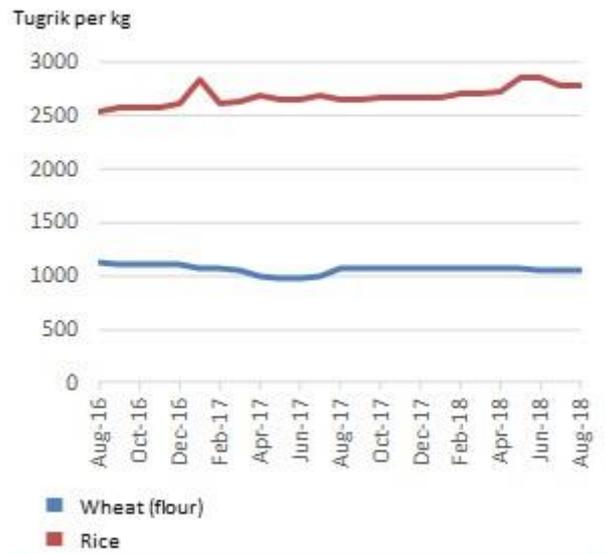
Tugrik per kg



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

Mongolia

Selected food prices in Ulaanbaatar



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



GIEWS Country Brief Mongolia

Reference Date: 15-January-2018

FOOD SECURITY SNAPSHOT

- Prolonged drought in 2017 acutely affected crop production and livestock conditions
- Wheat import requirements in 2017/18 forecast to sharply increase on reduced output
- Prices of beef and mutton decreased seasonally in recent months

Crop production in 2017 acutely affected by severe drought

According to the joint FAO/WFP Crop and Livestock Assessment Mission report, released on 22 December, the 2017 wheat output, the country's main staple, is estimated at 231 000 tonnes, half of the previous year's high level and more than 40 percent lower than the average of the previous five years. The decrease is the result of a prolonged period of severe dry weather between mid-May and end-July, coupled with extreme high temperatures in June, which resulted in a considerable decrease in plantings, widespread crop losses and sharply reduced yields. Severe losses were registered in most wheat-growing areas, including the main producing provinces of Bulgan in Khangai Region and Selenge and Tuv in Central Region, which together account for more than two-thirds of the overall wheat extension. Other crops, including potatoes, barley, oats and buckwheat were also heavily damaged by the dry weather.

Cereal import requirements in 2017/18 forecast to rise sharply on reduced output

Wheat and rice are the two main imported cereals, mostly purchased from the Russian Federation and Kazakhstan. The cereal import requirement in the 2017/18 marketing year (October/September) are forecast at 261 000 tonnes, considerably above last year's below-average level. Wheat import requirements in the 2017/18 marketing year are forecast at about 230 000 tonnes, considerably above the five-year average and considerably up from a mere 3 000 tonnes imported in 2016/17, when the national production was high. Imports of rice in 2018, which is not produced domestically, are anticipated to remain close to the previous year's level of 25 000 tonnes.

Prolonged drought severely affected livestock conditions

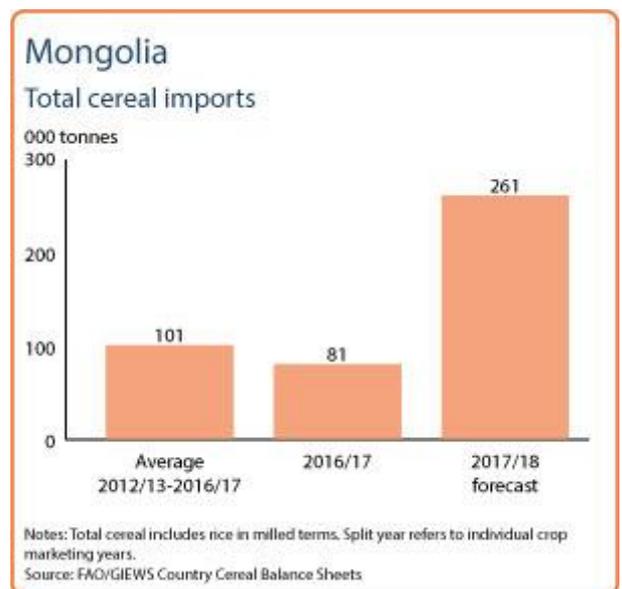
Drought caused a severe deterioration of pasture conditions, which prevented livestock to gain fat and strengthen their core



Mongolia
Cereal production

	2012-2016 average	2016	2017 estimate	change 2017/2016
	000 tonnes			percent
Wheat	399	467	231	-51
Barley	6	6	4	-33
Oats	5	5	4	-20
Others	0	0	0	0
Total	410	478	239	-50

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



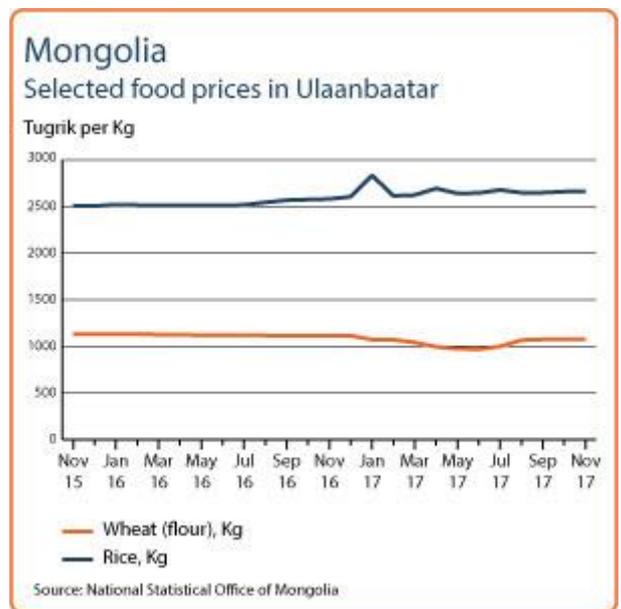
muscles, critical to overcome the normally harsh winter/spring months. According to the Ministry of Food, Agriculture and Light Industry data, as of November 2017, overall livestock body condition was 14 percent below average. Body conditions were reported to be particularly poor in Khangai and Central Regions' provinces. Drought-reduced hay and fodder availabilities, coupled with weak livestock conditions, raise serious concerns over the impact of the winter/spring months on livestock.

Prices of beef and mutton meat decreased seasonally in recent months

Retail prices of wheat flour have remained stable in recent months, but are expected to increase in early 2018 due to the reduced availability of locally produced wheat grains.

In November 2017, prices of beef and mutton meat were lower than a year earlier due to poor livestock body conditions and the increase of distressed sales of animals in most markets. Most herders have decided to sell larger amounts of livestock, even at lower prices, prior to the further deterioration of body conditions and the high probability of increased mortality during the winter/spring months. By contrast, prices of dairy products are reportedly higher than in 2016, mainly due to reduced animal productivity due to drought.

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





GIEWS Country Brief Mongolia

Reference Date: 25-August-2017

FOOD SECURITY SNAPSHOT

- **Wheat output in 2017 is forecast to decrease considerably from last year's level due to dry weather**
- **Wheat import requirements in 2017/18 marketing year are forecast to sharply increase from previous year's high level**
- **Prices of beef and mutton increased seasonally in recent months**

Wheat output in 2017 forecast to fall from last year's above-average level due to dry weather

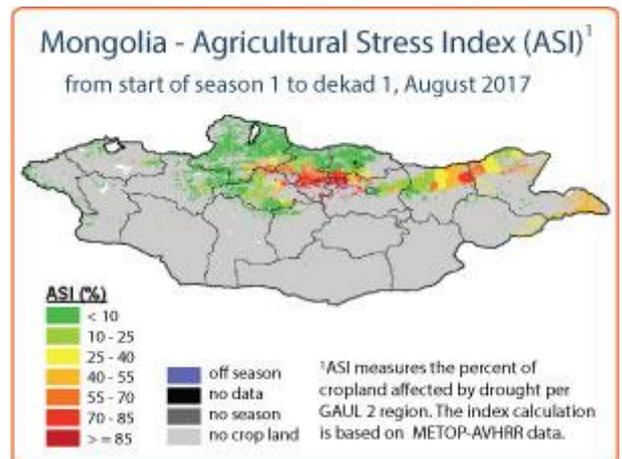
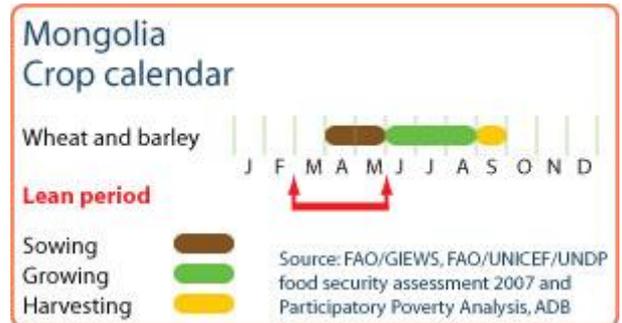
The 2017 wheat crop is currently at the grain filling stage and will be harvested in September. Weather conditions at the start of the season were generally favourable, benefitting planting activities. However, poor rains and high temperatures between June to mid-August over the main northern cereal-producing aimags (provinces), negatively affected wheat crop development during the critical growing periods, from the boot through to the heading and grain flowering stages (please see ASI map), causing considerable yield reductions. Therefore, despite an estimated 3 percent increase in wheat plantings to an above-average level of 367 200 hectares, production in 2017 is forecast at 259 000 tonnes, 45 percent down on the good 2016 output, reflecting expectations of the sharply reduced yields.

Cereal import requirements in 2017/18 marketing year forecast to rise sharply

Wheat and rice are the two main imported cereals, mostly purchased from the Russian Federation and Kazakhstan. Cereal imports in the 2017/18 marketing year (October/September) are forecast at 206 000 tonnes, considerably above last year's level, with wheat, forecast at 175 000 tonnes almost four times higher than in 2016/17, accounting for the bulk of the year-on-year increase. The higher volumes reflect the expected fall in the 2017 production. Imports of rice in 2017, which is not produced domestically, are anticipated to remain close to the previous year's level of 25 000 tonnes.

Prices of beef and mutton meat increased seasonally in recent months

Prices of beef and mutton, which are main local food staples, have been increasing seasonally since November 2017 in the



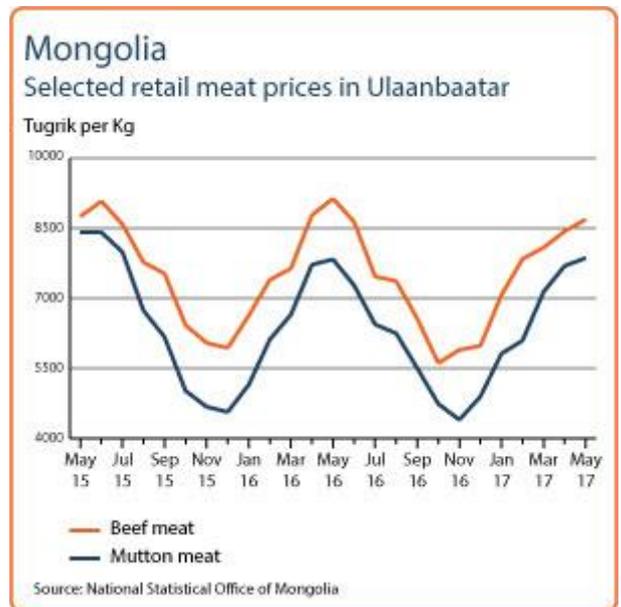
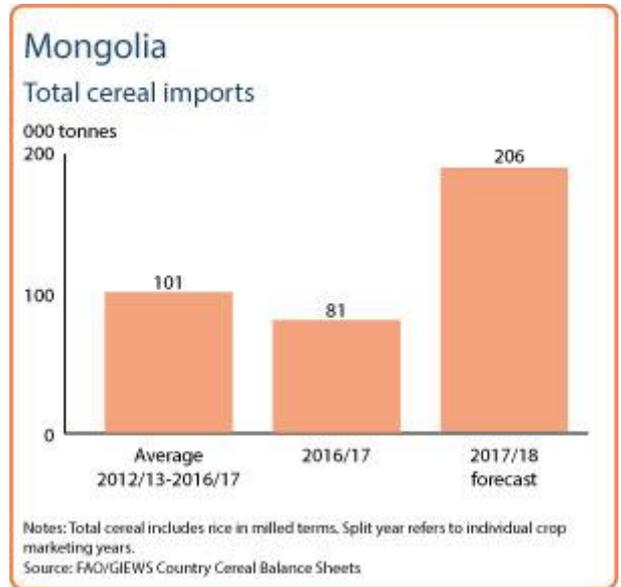
Mongolia Cereal production

	2012-2016 average	2016	2017 forecast	change 2017/2016
	000 tonnes			percent
Wheat	399	467	259	-45
Barley	6	6	6	0
Oats	5	5	6	20
Total	410	478	271	-43

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

capital, Ulaanbaatar, reflecting reduced market supplies. Meat prices are usually at their lowest levels during October-December and at their highest between May and July.

Wheat flour prices in Ulaanbaatar have been decreasing slightly between January and May, owing to good market availabilities from the 2016 bumper output.



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GIEWS Country Brief Mongolia

Reference Date: 05-May-2017

FOOD SECURITY SNAPSHOT

- Favourable outlook for 2017 wheat crop
- Wheat import requirements in 2016/17 forecast to sharply decrease from last year's high level
- Prices of beef and mutton increased seasonally in recent months

Favourable outlook for 2017 wheat crop

Planting of the 2017 wheat crop is currently underway under generally favourable weather conditions. The total area planted to wheat this year is officially estimated at 362 100 hectares, 2 percent above last year's high level. Considering the anticipated slight increase in plantings and assuming yields return to average, after reduced levels attained in 2016, FAO preliminarily forecasts the 2017 wheat output at 500 000 tonnes, 7 percent above last year's good level.

Cereal import requirements in 2016/17 marketing year forecast to sharply decrease

Wheat and rice are the two major imported cereals, mainly from the Russian Federation and Kazakhstan. Cereal imports in the 2016/17 marketing year (October/September) are forecast at 81 000 tonnes, well below last year's high level of 244 000 tonnes. This reflects lower wheat imports, which are forecast at 50 000 tonnes, four times less than in 2015/16 and close to the five-year average, reflecting the strong rebound in 2016 production. Imports of rice, which is not produced domestically, are anticipated in 2017 to remain close to the previous year's level of 25 000 tonnes.

Prices of beef and mutton meat increased seasonally in recent months

Prices of beef and mutton, which are main local staple foods, have been increasing seasonally since October 2016 in the capital, Ulaanbaatar, reflecting low market supplies. Overall, meat prices in February 2017 were above their year-earlier levels. Meat prices have the usual seasonal lows during October-December and highs during May-July.

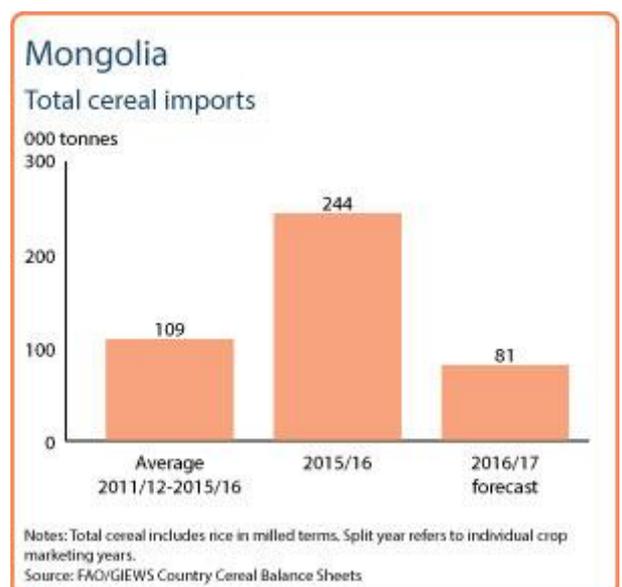
Wheat flour prices in Ulaanbaatar were relatively stable throughout 2016 but decreased slightly at the start of this year, owing to good market availabilities from the 2016 bumper output.



Mongolia Cereal production

	2012-2016 average	2016	2017 forecast	change 2017/2016
	000 tonnes			percent
Wheat	398	467	500	7
Barley	7	6	6	0
Oats	5	5	6	20
Others	0	0	0	0
Total	410	478	512	7

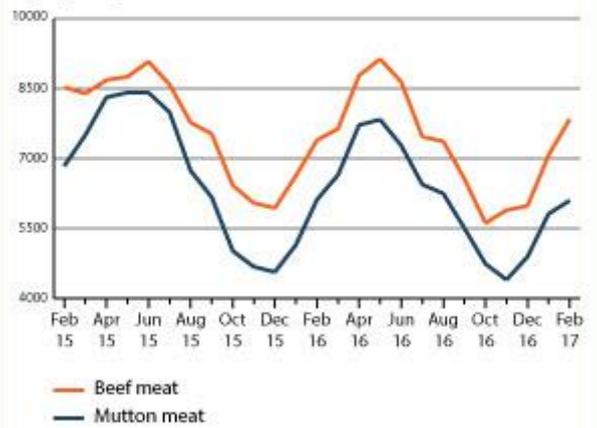
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Mongolia

Selected retail meat prices in Ulaanbaatar

Tugrik per Kg

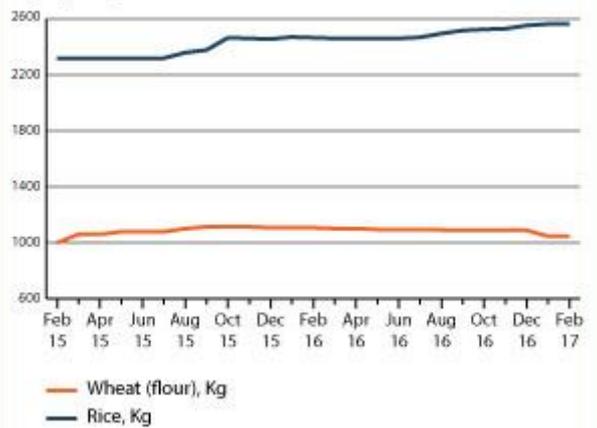


Source: National Statistical office of Mongolia

Mongolia

Selected food prices in Ulaanbaatar

Tugrik per Kg



Source: National Statistical office of Mongolia



GIEWS Country Brief Mongolia

Reference Date: 11-April-2017

FOOD SECURITY SNAPSHOT

- Wheat planting will start in major producing regions soon and 2017 output will depend on weather
- Wheat production in 2016 recovered from previous year's very low level
- Wheat import requirements in 2016/17 forecast to sharply decrease from last year's high level
- Prices of beef and mutton increased in recent months to reflect market seasonality
- Livestock sector and rural population affected by severe winter

Wheat planting will start soon and 2017 production will depend on weather

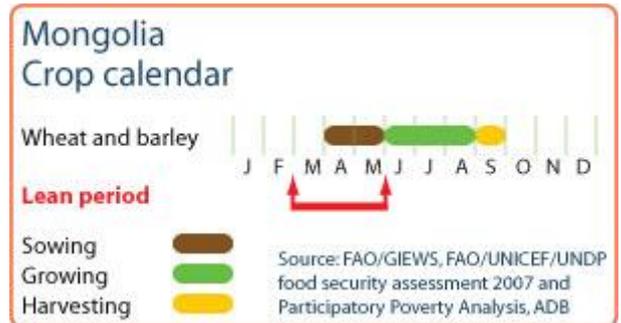
Local crop production depends essentially on adequate and timely rainfall. Given the short length of the growing season (from late May to early September), the early germination of crops is crucial to obtain a good production in the Central Agricultural Region, where around 80 percent of cereals are grown. The timely germination depends on the thawing of snow in May and timely rains during the early season.

Wheat production in 2016 recovered from previous year's sharply-reduced level

Harvestings of the 2016 main season cereal crops, mainly wheat, barley and oats, was completed in September. The 2016 wheat production is officially estimated at 467 000 tonnes, up 129 percent from the 2015 drought-reduced level and close to the 2014 record. This is the result of a recovery in both plantings and yields reflecting favourable weather conditions and Government support measures, including the distribution of subsidized fuel, seeds, pesticides, herbicides and fertilizers.

Cereal import requirements in 2016/17 marketing year forecast to sharply decrease

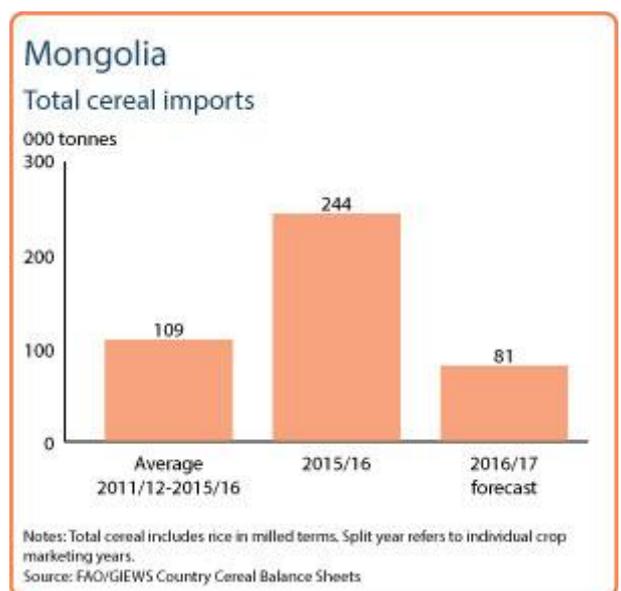
Wheat and rice are the two major imported cereals, mainly from the Russian Federation and Kazakhstan. Cereal imports in the 2016/17 marketing year (October/September) are forecast at 81 000 tonnes, well below last year's high level of 244 000 tonnes. This reflects lower wheat imports, which are forecast at 50 000 tonnes, four times less than in 2015/16 and close to the five-year average, reflecting the strong rebound in 2016 production. Rice (not produced in the country) imports in 2016



Mongolia Cereal production

	2012-2016 average	2016	2017 forecast	change 2017/2016
	000 tonnes			percent
Wheat	398	467	500	7
Barley	7	6	6	0
Oats	5	5	6	20
Others	0	0	0	0
Total	410	478	512	7

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



are anticipated to remain close to the previous year's level of 25 000 tonnes.

Prices of beef and mutton meat decreased in recent months

Prices of beef and mutton, which are main local staple foods, increased seasonally from October-November 2016 in the capital, Ulaanbaatar, mainly reflecting increased market supplies. The prices of beef and mutton in February were 33.1 percent and 38.6 percent, respectively, higher than three months earlier, but they were only 6.1 percent higher for beef and 0.4 percent lower for mutton than a year earlier. Meat prices have the usual seasonal lows during October-December and highs during May-July.

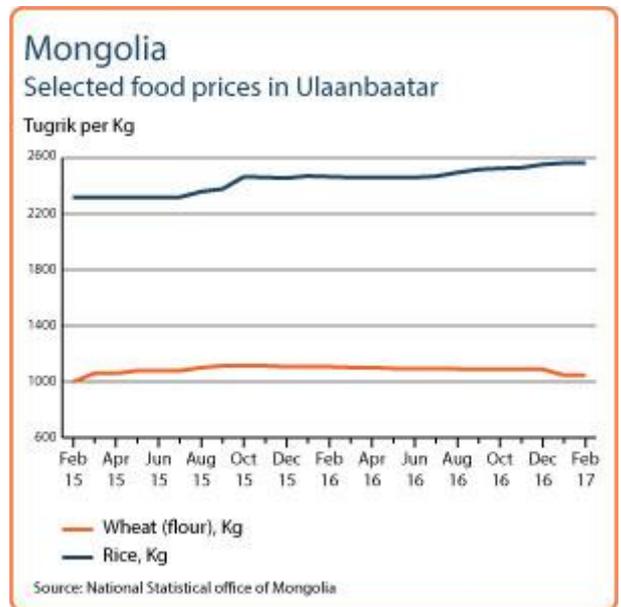
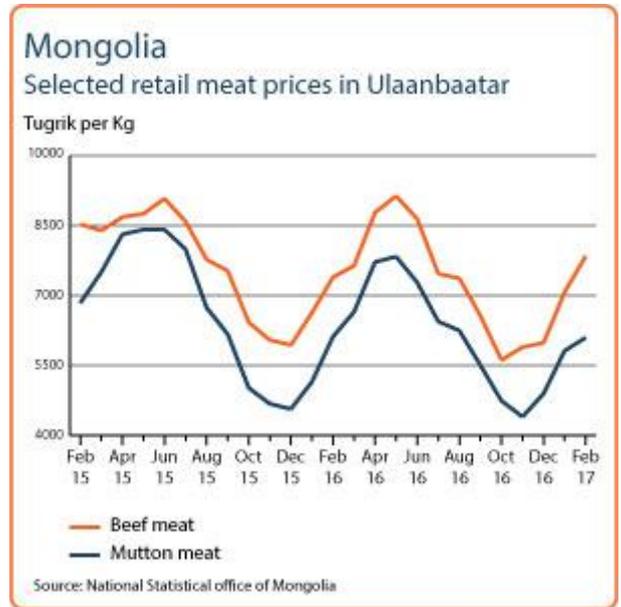
Wheat flour price in Ulaanbaatar, in February decreased by 3.9 percent from the previous month and 5.5 percent from a year earlier, mainly due to strong supply as a result of a good wheat harvest in 2016.

Livestock sector and rural population affected by severe winter in 2016/17

The country has experienced harsh winter conditions which have severely impacted herders' livelihoods. The extreme cold (-40 degrees Celcius), following the drought during the summer 2016, has depleted reserves of hay and fodder for livestock. Grazing and movements of animals have become increasingly difficult in the north of the country.

A severe winter in which a large number of livestock die due to lack of grazing resources or cold is called "dzud" in Mongolia. The Government of Mongolia has reported "dzud or near-"dzud" conditions in 127 soums of 17 provinces and two districts of Ulaanbaatar city. More than 165 000 people (about 43 000 herder families) are reported to have been affected as the poor health and death of livestock places them at risk of decreased incomes and food insecurity.

In response to the unfolding situation, the Government of Mongolia allocated MNT 3.7 billion (USD 1.5 million) to assist the affected populations. The United Nations allocated USD 1.1 million to support 3 500 of the most vulnerable herder households with Agriculture and Early Recovery activities.





GIEWS Country Brief Mongolia

Reference Date: 13-December-2016

FOOD SECURITY SNAPSHOT

- **Wheat production in 2016 recovered from last year's sharply-reduced level**
- **Wheat import requirements in 2016/17 forecast to sharply decrease from last year's high level**
- **Prices of beef and mutton meat have decreased in recent months**

Wheat production in 2016 recovered from last year's sharply-reduced level

Harvesting of the 2016 main season cereal crops, mainly wheat, barley and oats, was completed in September. The 2016 wheat production is estimated by FAO at 450 000 tonnes, up almost 80 percent from the 2015 drought-reduced level and close to the 2014 record. This is the result of a recovery in both plantings and yields reflecting favourable weather conditions and Government support measures, including the distribution of subsidized fuel, seeds, pesticides, herbicides and fertilizers.

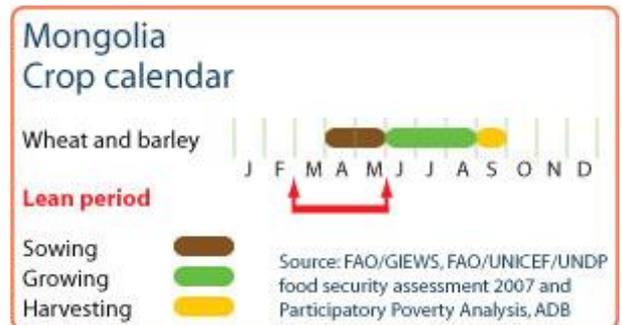
Wheat import requirements in 2016/17 marketing year forecast to sharply decrease

Wheat and rice are the two major imported cereals, mainly from the Russian Federation and Kazakhstan. Cereal imports in the 2016/17 marketing year (October/September) are forecast at 81 000 tonnes, well below last year's high level of 240 000 tonnes. This reflects lower wheat imports, which are forecast at 50 000 tonnes, four times less than in 2015/16 and close to the five-year average, reflecting the strong rebound in 2016 production. Rice imports in 2016 are anticipated to remain close to the previous year's level at 25 000 tonnes.

Prices of beef and mutton meat have decreased in recent months

Prices of beef and mutton, which are main local staple foods, decreased seasonally from June to October in the capital, Ulaanbaatar, mainly reflecting increased market supplies. Herders tend to sell most of their animals between July and December, when they usually reach the best body conditions across the year. Overall, October prices were below their levels in 2015.

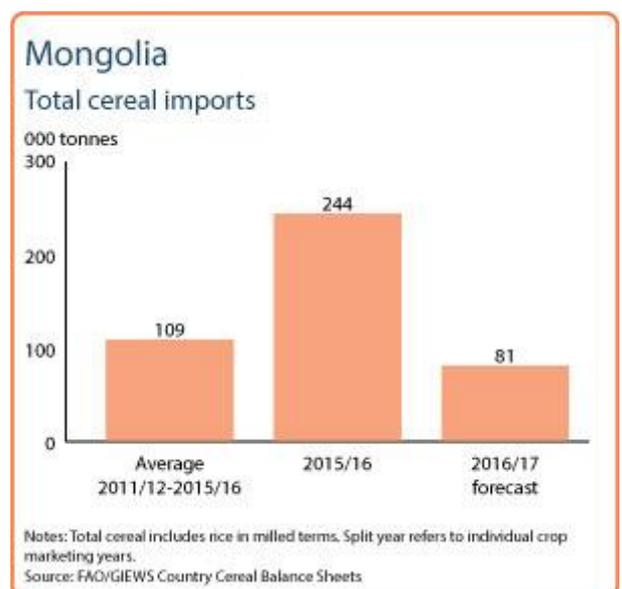
Wheat flour and rice prices in Ulaanbaatar remained relatively stable in recent months owing to adequate availabilities mainly from increased imports in recent months.



Mongolia Cereal production

	2011-2015 average	2015	2016 estimate	change 2016/2015
	000 tonnes			percent
Wheat	402	252	450	79
Barley	6	6	6	0
Oats	5	5	5	0
Others	0	0	0	0
Total	413	263	461	75

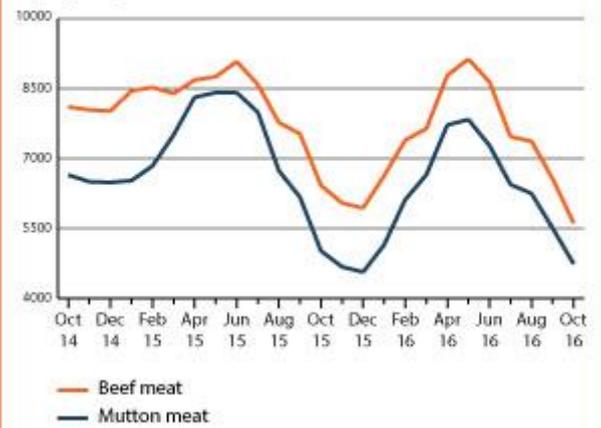
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Mongolia

Selected retail meat prices in Ulaanbaatar

Tugrik per Kg

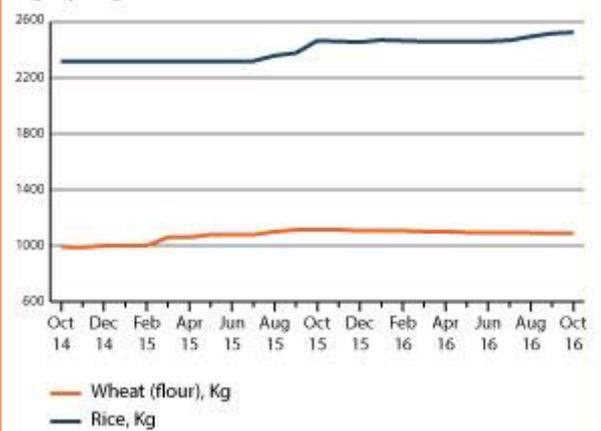


Source: National Statistical office of Mongolia

Mongolia

Selected food prices in Ulaanbaatar

Tugrik per Kg



Source: National Statistical office of Mongolia



GIEWS Country Brief Mongolia

Reference Date: 30-September-2016

FOOD SECURITY SNAPSHOT

- Wheat production in 2016 estimated to have recovered from last year's sharply-reduced level
- Wheat imports estimated at high level in 2015/16 marketing year (October/September)
- Prices of beef and mutton meat decreased in recent months

Wheat production in 2016 estimated to have recovered from last year's sharply-reduced level

Harvesting of the 2016 main season cereal crops, mainly wheat, barley and oats, is completed. The 2016 wheat production is estimated by FAO at 450 000 tonnes, up almost 80 percent from the 2015 sharply-reduced level and close to the 2014 record. This is the result of a recovery in both plantings and yields, reflecting favourable weather conditions and Government support, including distribution of subsidized fuel, wheat seeds, pesticides, herbicides and fertilizers.

Wheat imports estimated at high level in 2015/16 marketing year (October/September)

Wheat and rice are the two major imported cereals, mainly from the Russian Federation and Kazakhstan. Cereal imports in the 2015/16 marketing year (October/September) are estimated to almost triple the previous year's low level and reach 199 800 tonnes. This mainly reflects higher wheat imports, which are forecast at 170 000 tonnes, four times more than last year's level and well above the five-year average, reflecting the sharply reduced harvest in 2015. Rice imports in 2016 are anticipated to remain close to the previous year's level at 24 000 tonnes.

Prices of beef and mutton meat decreased in recent months

Prices of beef and mutton meat in Ulaanbaatar have decreased seasonally since June 2016, reflecting good supplies in the market. Overall, prices were below their levels in 2015.

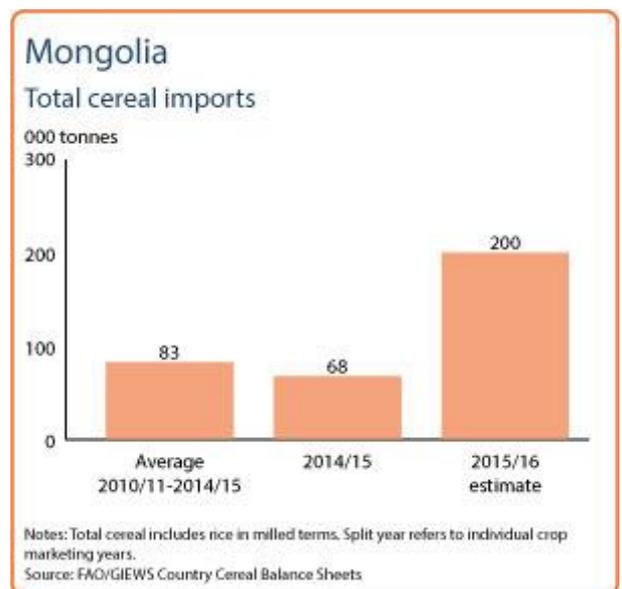
Wheat flour and rice prices in Ulaanbaatar remained relatively stable in recent months, owing to adequate availabilities mainly from increased imports.



Mongolia Cereal production

	2011-2015 average	2015	2016 estimate	change 2016/2015
	000 tonnes			percent
Wheat	402	252	450	79
Barley	6	6	6	0
Oats	5	5	5	0
Others	0	0	0	0
Total	413	263	461	75

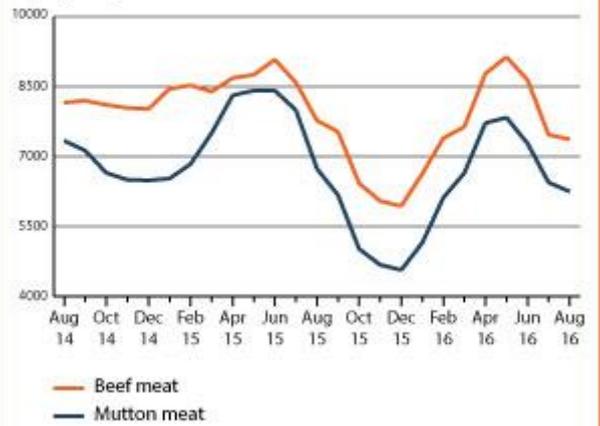
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Mongolia

Selected retail meat prices in Ulaanbaatar

Tugrik per Kg

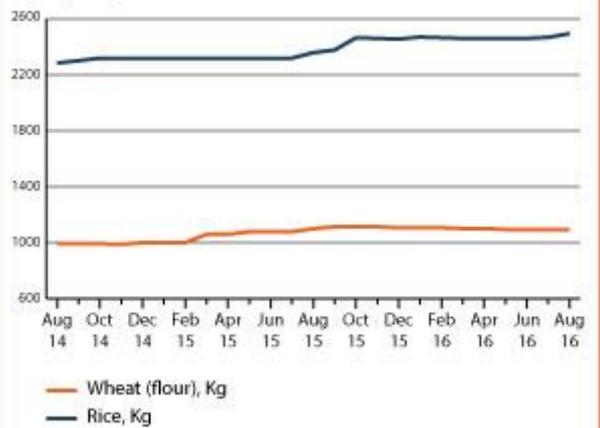


Source: National Statistical office of Mongolia

Mongolia

Selected food prices in Ulaanbaatar

Tugrik per Kg



Source: National Statistical office of Mongolia



GIEWS Country Brief Mongolia

Reference Date: 29-July-2016

FOOD SECURITY SNAPSHOT

- **Wheat production to recover in 2016 from last year's sharply-reduced level**
- **Wheat imports forecast at high level in 2015/16 marketing year (October/September)**
- **Prices of beef and mutton meat decrease in June 2016**

Wheat production to recover in 2016 from last year's sharply reduced level

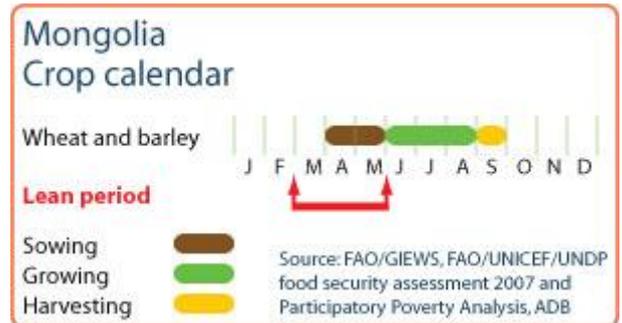
Rainfall since the start of the season in April has been near average over most of the country, benefitting planting activities and development of crops, which are now in the critical growth stages. According to official sources, total wheat area in 2016 is estimated to have reached a record level of 385 200 hectares. The expansion in plantings is also the result of government support, including exception of excise tax on diesel imports during sowing time, distribution of subsidised fuel, wheat seeds, pesticides, herbicides and fertilizers. Assuming favourable weather for the remainder of the season, the 2016 wheat output is seen to recover to 400 000 tonnes, up 60 percent from the drought-reduced level in 2015.

Wheat output in 2015 declined sharply due to drought

Official estimates put the 2015 wheat production at 252 300 tonnes, almost 50 percent down from the 2014 record harvest and 37 percent below the average of the previous five years. Despite an expansion in plantings, the output decreased due to prolonged drought, which negatively affected wheat crops during the critical growing period.

Wheat imports forecast to decrease in 2015/16 marketing year (October/September)

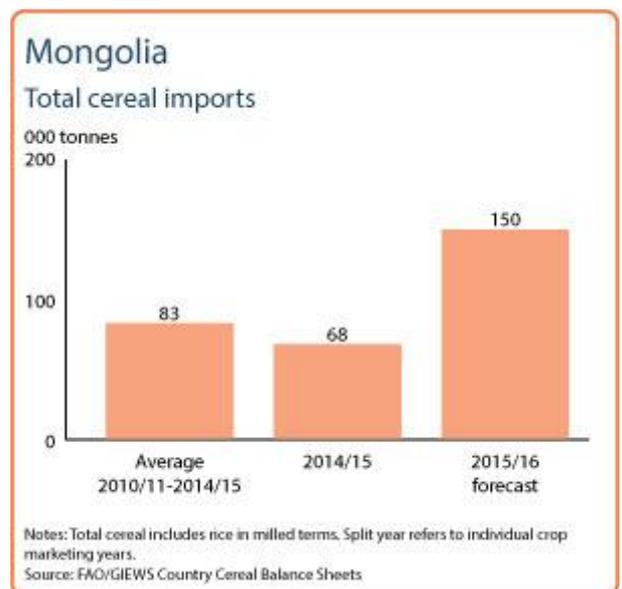
Wheat and rice are the two major imported cereals, mainly from the Russian Federation and Kazakhstan. Cereal imports in the 2015/16 marketing year (October/September) are forecast to more than double the previous year's low level and reach 149 800 tonnes. This mainly reflects higher wheat imports, which are forecast at 120 000 tonnes, three times more than the previous five-year's average, reflecting the sharply reduced harvest in 2015. Rice imports in 2016 are anticipated to remain close to the previous year's level at 24 000 tonnes.



Mongolia Cereal production

	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Wheat	402	252	400	59
Barley	6	6	6	0
Oats	5	5	5	0
Others	0	0	0	0
Total	413	263	411	56

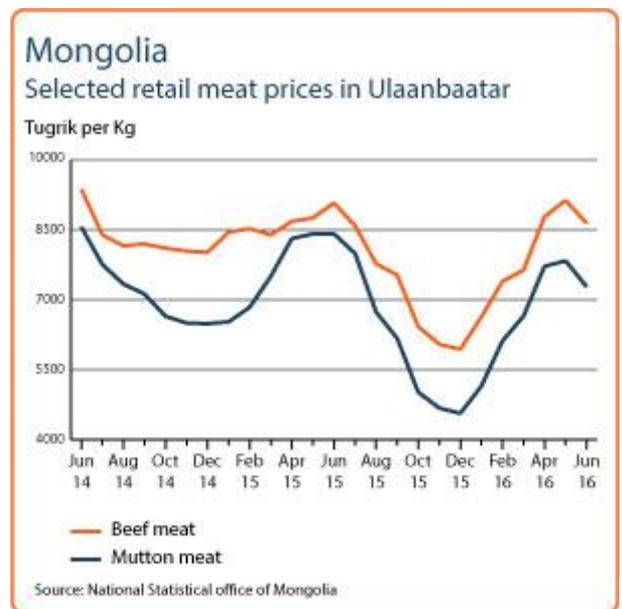
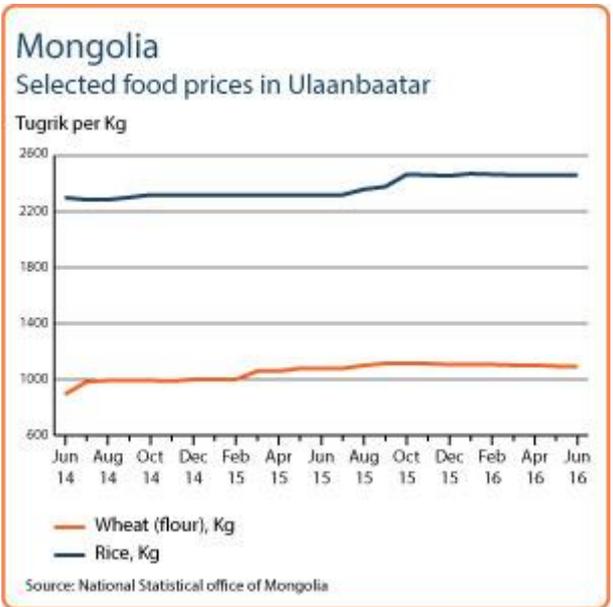
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Prices of beef and mutton meat decreased in June

Prices of beef and mutton meat in Ulaanbaatar decreased seasonally in June 2016, as new supplies started gradually entering the market. Overall, prices were below their levels in 2015.

Wheat flour and rice prices in Ulaanbaatar remained relatively stable since late 2015, reflecting adequate availabilities mainly from increased imports.



Reference Date: 22-February-2016

FOOD SECURITY SNAPSHOT

- Limited fodder after dry summer and severe cold winter raises serious concerns for livestock sector
- Wheat output in 2015 declined sharply from last year's record due to dry weather
- Wheat imports forecast to increase considerably in 2015/16 marketing year (October/September)
- Prices of beef and mutton dropped sharply in second half of 2015

Limited fodder after dry summer and severe cold winter raises serious concerns for livestock sector

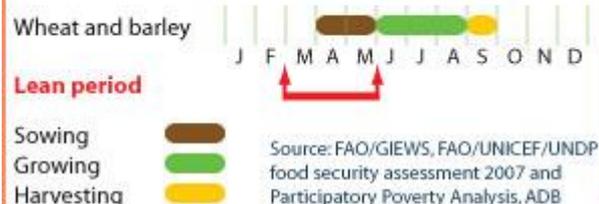
Heavy snow cover since early November 2015 over large parts of the country, including rangeland on which herds usually feed in the winter, has prevented livestock from accessing pasture. This severe winter follows a summer drought, which had already caused a reduction in production of hay as winter fodder for animals. According to the latest official reports, as of early January, 50 soums (districts) in 16 aimags (provinces) mostly located in the northeast are already affected by the dzud (extreme cold and heavy snow following a summer drought). Considering herders' reduced fodder supplies, if the cold weather and continuous snow cover persists in the coming weeks this is expected to have a negative impact on the livestock sector.

Given the current unfavourable outlook, it is important to closely monitor developments in the coming weeks to ensure that contingency plans are in place that can mitigate possible negative impacts. Meanwhile, since early January, the Government has started the distribution of fodder and allocated over USD 3.4 million to support herders to overcome the ongoing harsh winter.

Wheat output in 2015 declined sharply from last year's record due to dry weather

Harvesting of the 2015 main season cereals, mainly wheat, barley and oats, was completed last September. According to official sources, total wheat plantings in 2015 reached a record high level of 360 700 hectares, an expansion of 24 percent compared to 2014, reflecting good rainfall during the planting period from April to May and Government support, including partial tax exemption, interest free loans and advance payments for wheat seeds. However, generally poor rains between June to mid-August over the main wheat-producing aimags (provinces), including Selenge and Töv, which together account for about 65 percent of the national wheat output, negatively affected wheat crops during the critical growing period, from the boot stage through heading and grain flowering. This caused considerable yield reductions and, as a result, latest official estimates for the 2015 wheat production stand at 252 300 tonnes, almost 50 percent down from the 2014 record harvest and 40 percent below the average of the past five years.

Mongolia Crop calendar

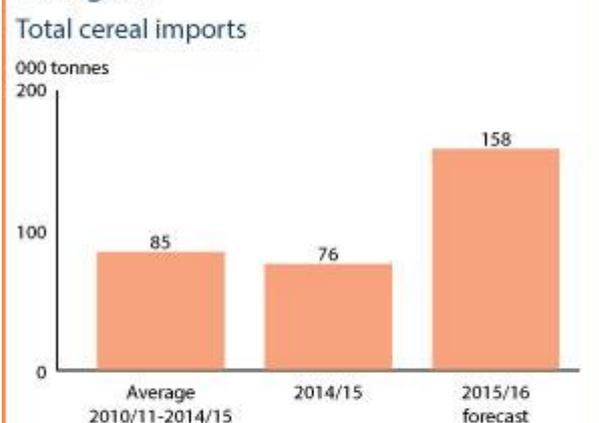


Mongolia Cereal production

	2010-2014 average	2014	2015 estimate	change 2015/2014
	000 tonnes		percent	
Wheat	420	488	252	-48
Barley	6	7	6	-14
Oats	5	5	5	0
Others	0	0	0	0
Total	431	500	263	-47

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

Mongolia 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

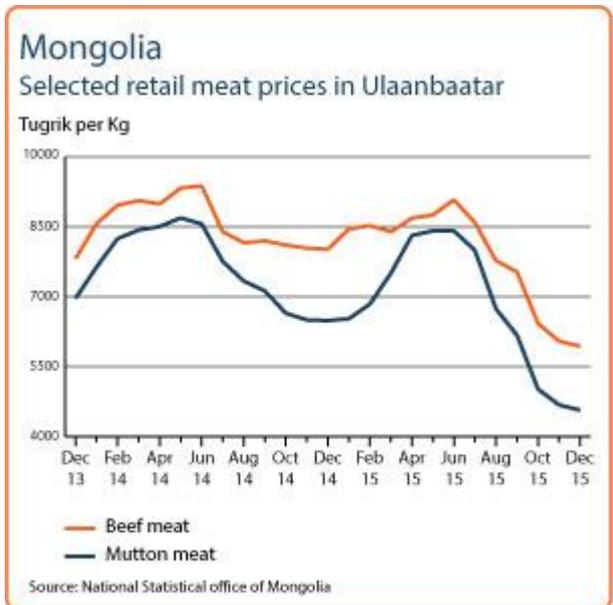
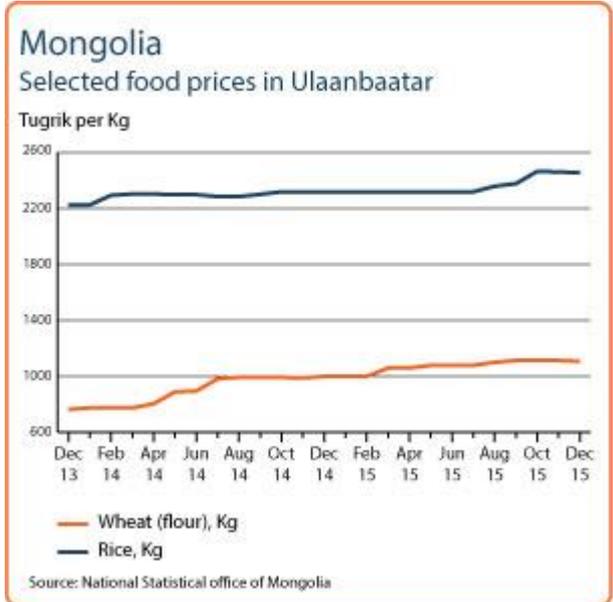
Wheat imports forecast to increase considerably in 2015/16 marketing year (October/September)

Wheat and rice are the two major imported cereals, mainly from the Russian Federation and Kazakhstan. Cereal imports in the 2015/16 marketing year (October/September) are forecast to almost double from last year's near-average level and reach 157 800 tonnes. This mainly reflects higher wheat imports, which are forecast at 120 000 tonnes, about three times more than in the previous year, as a result of the reduced 2015 harvest. Rice imports in 2016 are anticipated to remain close to last year's level at 32 000 tonnes.

Prices of beef and mutton dropped sharply in second half of 2015

Prices of beef and mutton meat in Ulaanbaatar dropped sharply in the second half of last year, due to increased supplies in the market, as farmers sell higher quantities amid concerns about the impact of the dzud on livestock. In December, prices of mutton and beef meat were 30 and 26 percent, respectively, below their year earlier levels.

Wheat flour and rice prices in Ulaanbaatar remained relatively stable in late 2015.



Reference Date: 24-September-2015

FOOD SECURITY SNAPSHOT

- Wheat output in 2015 estimated to decline sharply from last year's record due to dry weather
- Wheat imports forecast to increase considerably in 2015/16 marketing year (October/September)
- Prices of wheat flour were generally stable in July but at high levels

Wheat output in 2015 estimated to decline sharply from last year's record due to dry weather

Harvesting of the 2015 main season cereals, mainly wheat, barley and oats, is ongoing and will continue until the end of September. According to official sources, total wheat plantings for this year's harvest reached a record high level of 360 700 hectares, an expansion of 24 percent compared to 2014, reflecting good rainfall during the planting period from April to May and Government support, including partial tax exemption, interest free loans and advance payments for wheat seeds. However, generally poor rains between June to early September over the main northcentral cereal-producing aimags (provinces), including Selenge and Töv, which together account for about 65 percent of national wheat output, negatively affected wheat crops during the critical growing period, from the boot stage through heading and grain flowering (see ASI map). This caused considerable yield reductions and, as a result, latest official estimates for the 2015 wheat production stand at 252 300 tonnes, almost 50 percent down on the 2014 record harvest and 40 percent below the previous five-year average.

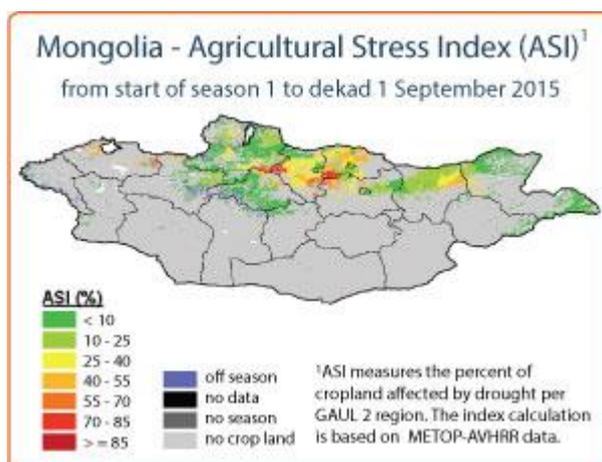
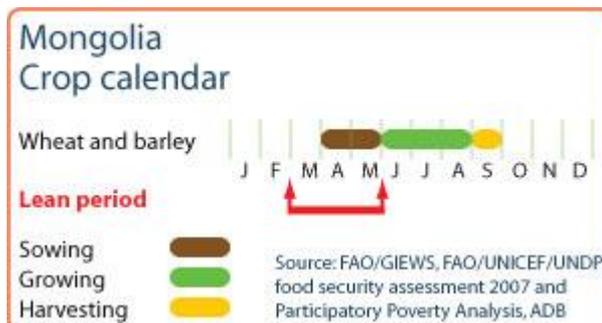
Reportedly, the dry weather also negatively affected fodder crops and retarded pasture development, raising concern for the livestock sector, particularly if the country experiences another harsh winter (dzud) that could further aggravate conditions.

Given this unfavourable outlook, it is important to closely monitor developments in the coming weeks/months to ensure that contingency plans are in place that can mitigate possible negative impacts. Meanwhile, the Government plans to allocate MNT 10.6 billion (about USD 5.3 million) to support herders to overcome the potentially-harsh winter ahead. The measures will include replenishment of the State Emergency Reserve Fund (a fund which buys grain, flour and fodder at market prices to maintain emergency reserves for natural disasters) through procurement of fodder crops from companies that suffered a loss due to drought and distribution of an additional amount of fodder to aimags prone to heavy snowfall.

FAO's Global Information and Early Warning System will continue to closely monitor the situation and assess the potential impact on the food security of the vulnerable population.

Wheat imports forecast to increase considerably in 2015/16 marketing year (October/September)

Wheat and rice are the two major imported cereals, mainly from the Russian Federation and Kazakhstan. Cereal imports in the 2015/16



Mongolia Cereal production

	2010-2014 average	2014	2015 estimate	change 2015/2014
	000 tonnes			percent
Wheat	420	488	252	-48
Barley	6	7	6	-14
Oats	5	5	5	0
Others	0	0	0	0
Total	431	500	263	-47

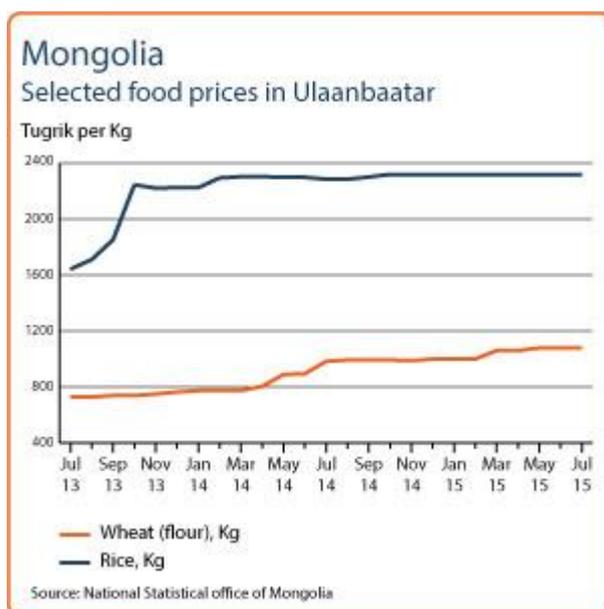
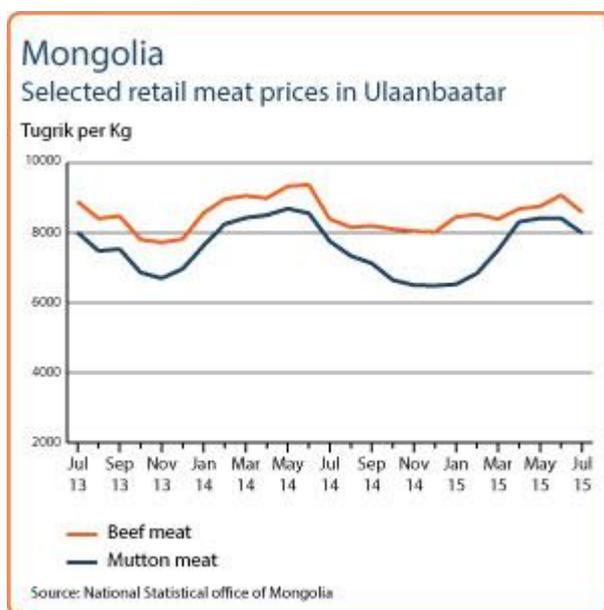
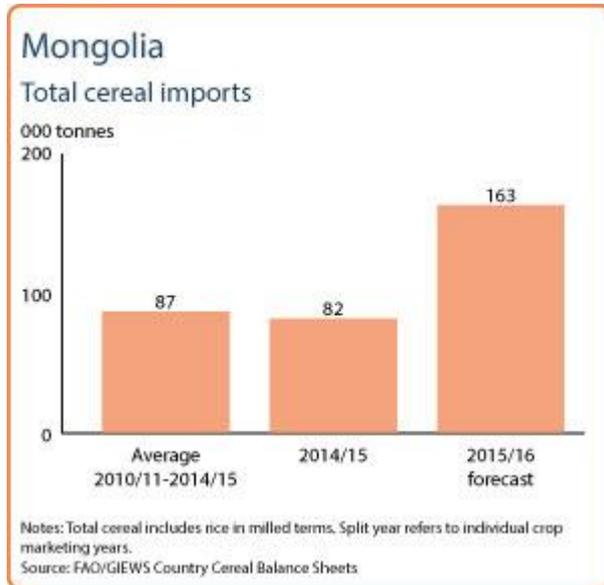
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

marketing year (October/September) are forecast to almost double last year's near-average level and reach 163 000 tonnes. This mainly reflects higher wheat imports, which are forecast at 120 000 tonnes, about three times more than last year's level, as a result of the decrease of the 2015 harvest. Rice imports in 2015 are anticipated to remain close to last year's level at 36 000 tonnes.

Prices of wheat flour were generally stable in July but at high levels

Wheat flour prices in Ulaanbaatar were generally stable for the fifth consecutive month in July, but were 10 percent above their year-earlier level. Prices are underpinned by continued strong domestic demand and depreciation of the local currency. Prices of rice showed comparatively stable trends in recent months.

Prices of beef and mutton meat in Ulaanbaatar decreased seasonally, as new supplies start gradually entering the market. Overall, prices were slightly above their year-earlier levels.



Reference Date: 26-August-2015

FOOD SECURITY SNAPSHOT

- Wheat output in 2015 forecast down from last year's record due to dry weather
- Wheat imports forecast to increase in 2015/16 marketing year (October/September)
- Prices of wheat flour were generally stable in June but at high levels

Wheat output in 2015 forecast down from last year's record due to dry weather

Harvesting of the 2015 main season cereals, mainly wheat, barley and oats, is about to start. According to official sources, total wheat plantings for this year's harvest reached a record high level of 360 200 hectares, an expansion of 33 percent compared to 2014, reflecting good rainfall during the planting period from April to May and Government support, including partial tax exemption, interest free loans and advance payments for wheat seeds. However, poor rains between June to mid-August over the main northcentral cereal-producing aimags (provinces), including Selenge and Töv, which together account for about 65 percent of national wheat output, reported negatively affected wheat crops during the critical growing period, from the boot stage through heading and grain flowering (see ASI map). This is likely to have caused considerable yield reductions and as a result, FAO's latest forecast for the 2015 wheat production stands at 450 000 tonnes, 8 percent below last year's record harvest.

Reportedly, dry weather also negatively affected fodder crops, barley and other cereals this year.

The FAO's Global Information and Early Warning System will continue to closely monitor the situation and assess the potential impact on the food security of the vulnerable population.

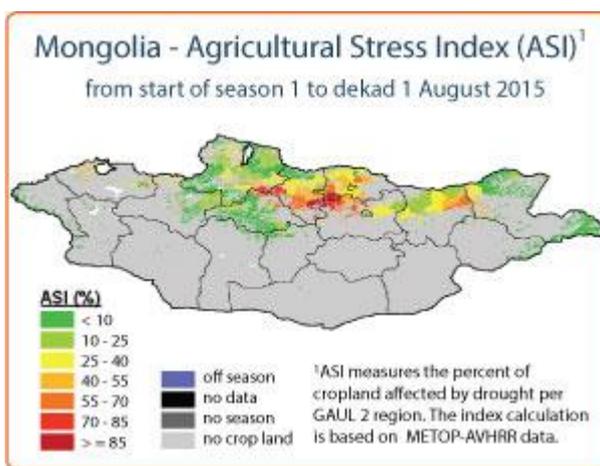
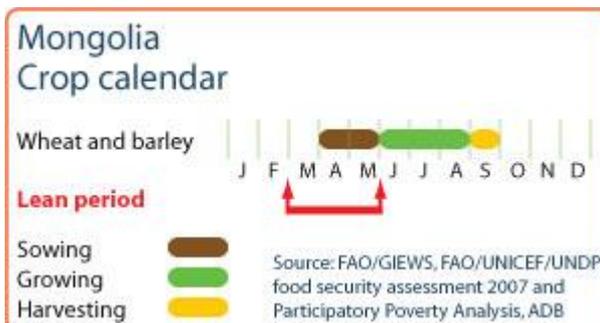
Wheat imports forecast to increase in 2015/16 marketing year (October/September)

Wheat and rice are the two major imported cereals, mainly from the Russian Federation and Kazakhstan. Cereal imports in the 2015/16 marketing year (October/September) are forecast to increase by 8 percent from last year's near-average level, to 83 000 tonnes. This mainly reflects higher wheat imports, which are forecast at 40 000 tonnes, 14 percent above last year's level, as a result of the expected decrease of the 2015 harvest. Rice imports in 2015 are anticipated to remain close to last year's level at 36 000 tonnes.

Prices of wheat flour were generally stable in June but at high levels

Wheat flour prices in Ulaanbaatar were generally stable for the fourth consecutive month in June, but were 21 percent above their year-earlier level. Prices are underpinned by continued strong domestic demand and depreciation of the local currency.

Prices of rice showed comparatively stable trends in recent months.



Mongolia Cereal production

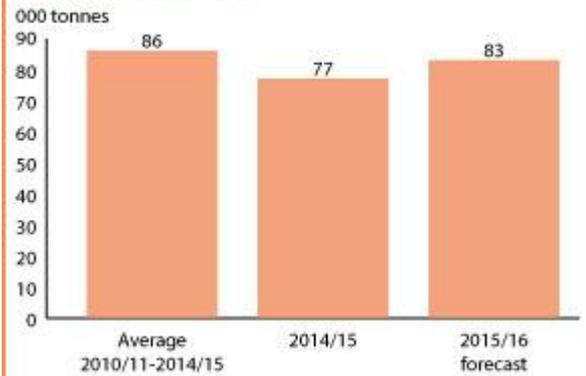
	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes		percent	
Wheat	420	488	450	-8
Barley	6	7	6	-14
Oats	5	5	5	0
Others	0	0	0	0
Total	431	500	461	-8

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

Prices of beef and mutton meat in Ulaanbaatar increased slightly in the past several months, following seasonal trends, as supplies have gradually dwindled. However, prices remained below their year-earlier levels.

Mongolia

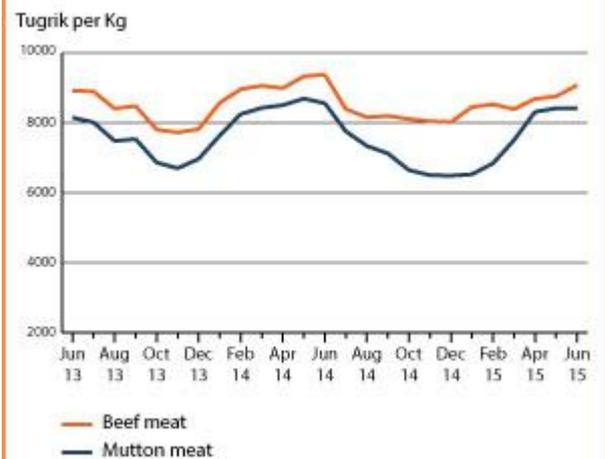
Total cereal imports



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

Mongolia

Selected retail meat prices in Ulaanbaatar



Source: National Statistical office of Mongolia

Mongolia

Selected food prices in Ulaanbaatar



Source: National Statistical office of Mongolia

Reference Date: 27-February-2015

FOOD SECURITY SNAPSHOT

- 2014 wheat harvest is estimated to have recovered from last year's reduced level
- Wheat imports forecast to decrease in 2014/15 marketing year (October/September)
- Prices of wheat flour were generally stable in January but at record levels

2014 wheat production is estimated to have recovered from last year's reduced level

Harvesting of the 2014 main season crops, mainly wheat, barley and oats, was completed in mid-October. The official estimates for the 2014 wheat production have been revised upward, to a record level of 488 000 tonnes, 33 percent up from last year's weather-depressed harvest. The increase in production reflects higher yields, following favourable weather conditions in main producing areas during the season and a 6 percent increase in sowings compared to last year's reduced level.

Wheat imports forecast to decrease in 2014/15 marketing year (October/September)

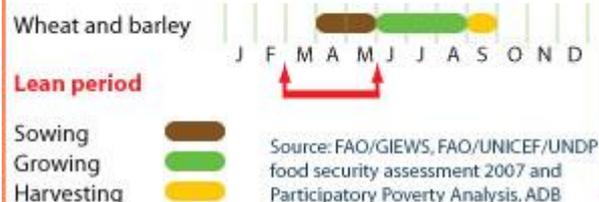
Wheat and rice are the two major imported cereals, mainly from the Russian Federation and Kazakhstan. Cereal imports in the 2014/15 marketing year (October/September) are forecast to decrease by 12 percent from last year's above-average level, to 105 800 tonnes. This mainly reflects lower wheat imports which are forecast at 70 000 tonnes, 13 percent below last year's level, as a result of the record 2014 harvest. Similarly, rice imports in 2015 are anticipated to decrease from last year's level by 14 percent to 30 000 tonnes.

Prices of wheat flour were stable in January but at record levels

Wheat flour prices in Ulaanbaatar were generally stable for the seventh consecutive month in January, but were 29 percent above last year's level. Prices are being underpinned by a continued strong domestic demand and a strong depreciation of the local currency.

Prices of beef and mutton meat in Ulaanbaatar strengthened in January on strong demand. However, both remained below their levels from a year earlier.

Mongolia Crop calendar

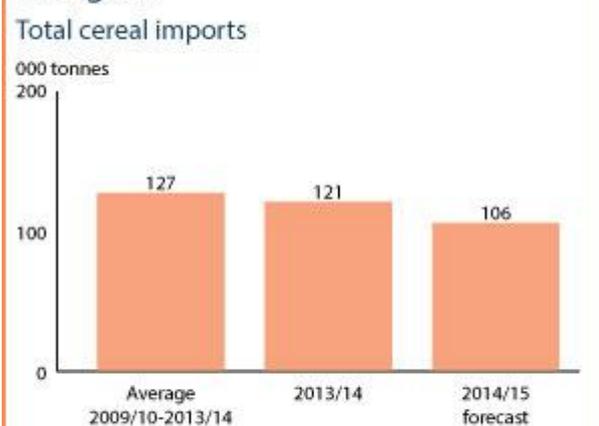


Mongolia Cereal production

	2009-2013 average	2013	2014 estimate	change 2014/2013
	000 tonnes		percent	
Wheat	400	368	488	33
Barley	5	7	7	0
Oats	4	5	5	0
Others	0	0	0	0
Total	409	380	500	32

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

Mongolia Total cereal imports

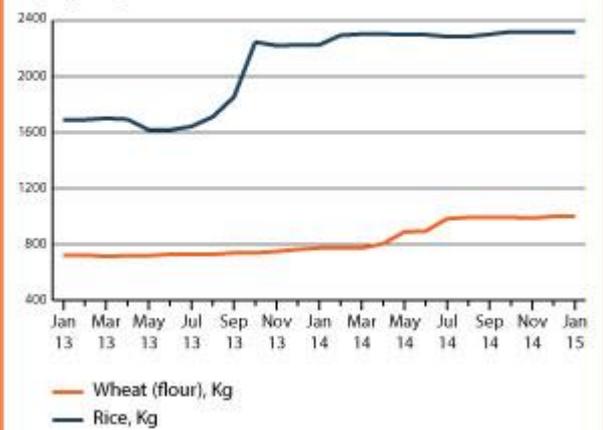


Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Mongolia

Selected food prices in Ulaanbaatar

Tugrik per Kg

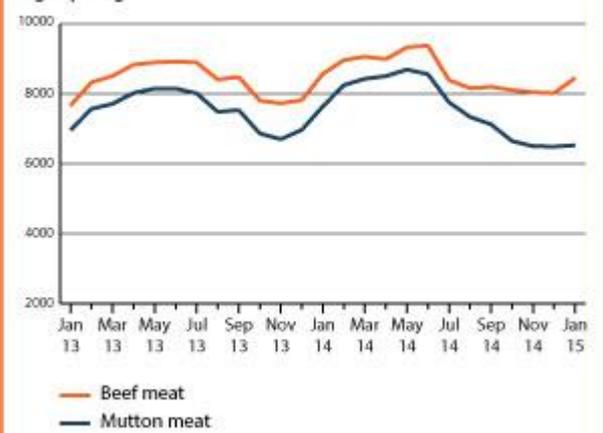


Source: National Statistical office of Mongolia

Mongolia

Selected retail meat prices in Ulaanbaatar

Tugrik per Kg



Source: National Statistical office of Mongolia

Reference Date: 17-November-2014

FOOD SECURITY SNAPSHOT

- 2014 wheat harvest is estimated to have recovered from last year's reduced level
- Wheat imports forecast to decrease in 2014/15 marketing year (October/September)
- Prices of wheat flour in October were generally stable but at record levels

2014 wheat production is estimated to have recovered from last year's reduced level

Harvesting of the 2014 main season crops, mainly wheat, barley and oats, was completed with a slight delay in mid-October. Latest official estimates put the 2014 wheat production at 465 000 tonnes, 26 percent up from last year's weather-depressed harvest. The increase in production reflects higher yields, following favourable climatic conditions between April and mid-August in the main producing areas and a 6 percent increase in sowings compared to last year's reduced level.

Wheat imports forecast to decrease in 2014/15 marketing year (October/September)

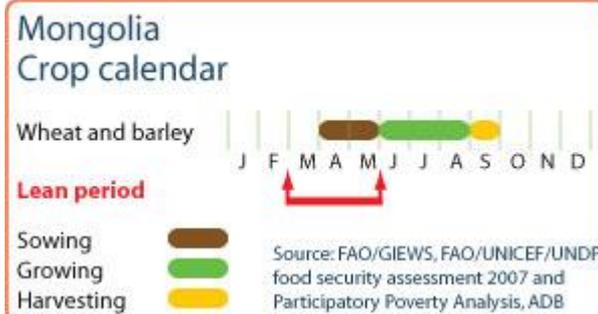
Wheat and rice are the two major imported cereals, mainly from the Russian Federation and Kazakhstan. Cereal imports in the 2014/15 marketing year (October/September) are forecast to decrease by 19 percent from last year's above-average level, to 105 800 tonnes. This mainly reflects anticipated lower wheat imports, which are forecast at 70 000 tonnes, 22 percent below last year's level, based on the recovery in production this year. Similarly, rice imports in 2015 are anticipated to decrease from last year's level to 30 000 tonnes.

Prices of wheat flour in October were generally stable but at record levels

Wheat flour prices in Ulaanbaatar were generally stable for the third consecutive month in October but were 34 percent above last year's level. Prices are being underpinned by continued strong domestic demand and the bulk of the recent harvest having not yet entered the market.

Prices of beef and mutton meat in Ulaanbaatar have been generally decreasing since July 2014. Beef and mutton prices in Ulaanbaatar capital city market follow the usual seasonal lows during October-December and highs during May-July.

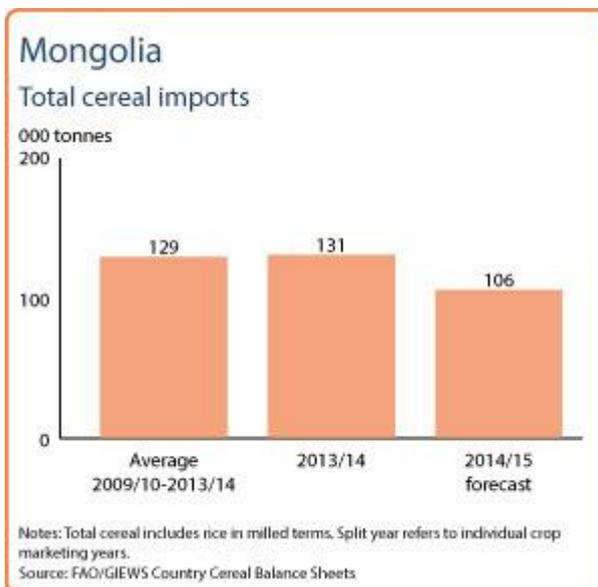
According to the Central Bank of Mongolia, the year-on-year inflation rate in October 2014 was 12 percent.



Mongolia Cereal production

	2009-2013 average	2013	2014 estimate	change 2014/2013
	000 tonnes		percent	
Wheat	400	368	465	26
Barley	5	7	7	0
Oats	4	5	5	0
Others	0	0	0	0
Total	409	380	477	26

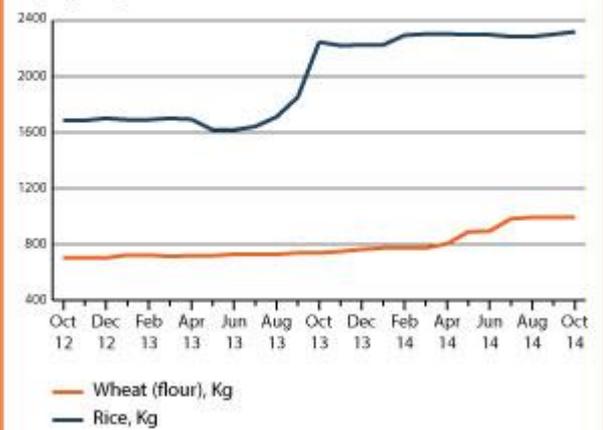
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Mongolia

Selected food prices in Ulaanbaatar

Tugrik per Kg

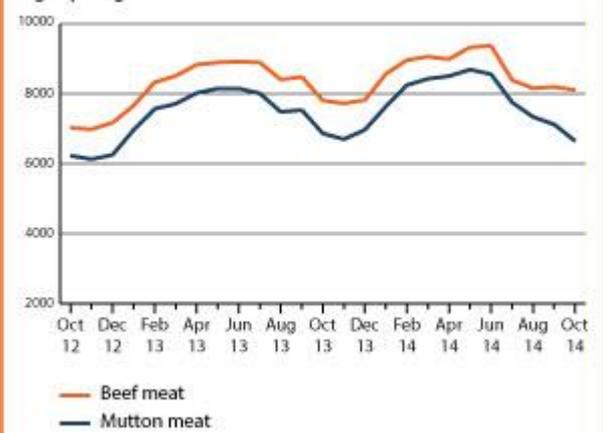


Source: National Statistical Office of Mongolia

Mongolia

Selected retail meat prices in Ulaanbaatar

Tugrik per Kg



Source: National Statistical Office of Mongolia

Reference Date: 12-August-2014

FOOD SECURITY SNAPSHOT

- The 2014 wheat harvest is expected to recover from 2013's below-average output
- Wheat imports forecast to increase in the 2013/14 marketing year
- Prices of beef and mutton at near-record levels

The 2014 wheat harvest is expected to recover

FAO's latest forecast for the 2014 wheat production, to be harvested in September, stands at 430 000 tonnes, 17 percent up from last year's weather-depressed harvest. The good output is mainly attributed to generally favourable climatic conditions between April and mid-August in the main producing areas and a 6 percent expansion in the area planted compared to last year's reduced level, due to the delayed onset of seasonal rains.

Wheat imports forecast to increase sharply in the 2013/14 marketing year (October/September)

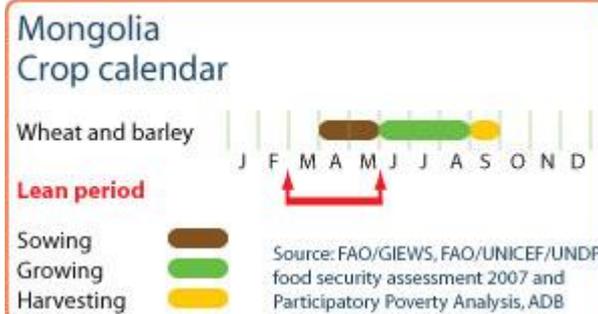
Wheat and rice are the two major imported cereals, mainly from the Russian Federation and Kazakhstan. Cereal imports in the 2013/14 marketing year (October/September) are forecast to increase by more than one-third from last year's low level, to 155 800 tonnes. The increase reflects larger wheat imports, which are expected to grow by 50 percent to 120 000 tonnes, due to lower domestic availabilities. Rice imports in 2014 are anticipated to remain similar to last year's average level.

Prices of wheat flour, beef and mutton increase in 2014

Wheat flour prices increased between March and May, due to lower domestic availabilities during the lean season. However, in June prices remained unchanged, partly attributed to decreasing export prices in the Russian Federation, the country's main supplier. In Ulaanbaatar, the capital's main market, prices of wheat flour in June were 23 percent above last year's level. Bread prices, generally subsidized, have remained stable since March 2013 and were lower than those of wheat flour. Prices of rice showed comparatively stable trends in recent months.

Prices of beef and mutton meat in Ulaanbaatar, which have been generally increasing since the beginning of 2014, were at record and near-record levels in June. Continued strong domestic demand, associated with overall economic growth, has supported prices.

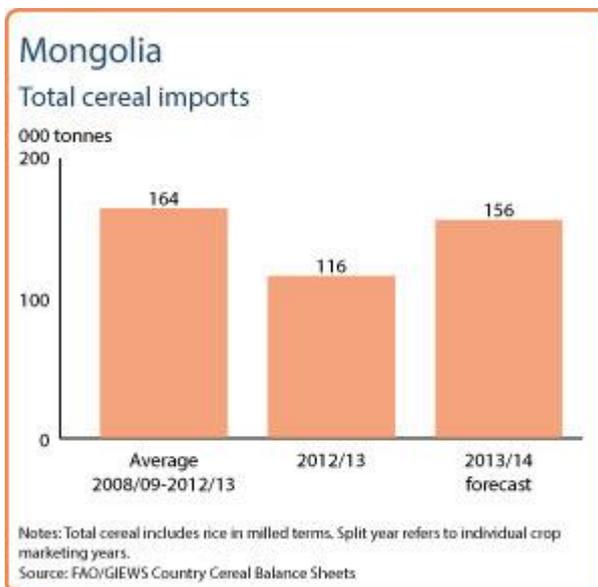
According to the Central Bank of Mongolia, the year-on-year inflation rate in June 2014 was 14.6 percent.



Mongolia Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes		percent	
Wheat	400	368	430	17
Barley	5	7	7	0
Oats	4	5	5	0
Others	0	0	0	0
Total	409	380	442	16

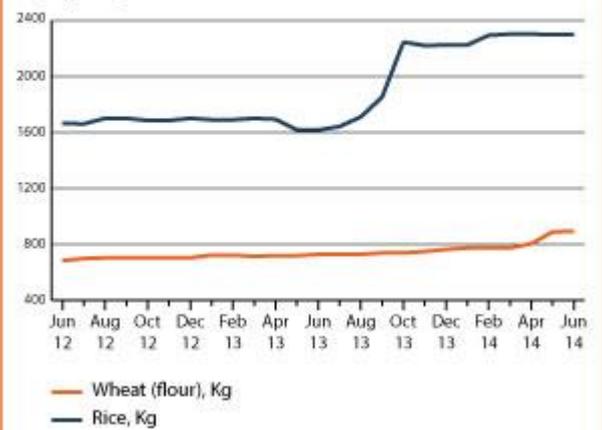
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Mongolia

Selected food prices in Ulaanbaatar

Tugrik per Kg

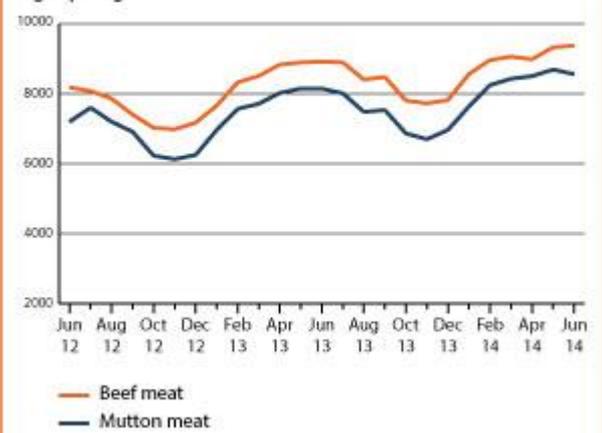


Source: National Statistical Office of Mongolia

Mongolia

Selected retail meat prices in Ulaanbaatar

Tugrik per Kg



Source: National Statistical Office of Mongolia

Reference Date: 30-May-2014

FOOD SECURITY SNAPSHOT

- The 2014 wheat harvest forecast to recover
- Wheat imports to increase in the 2013/14 marketing year
- Prices of beef and mutton at near-record levels

The 2014 wheat harvest forecast to recover

Planting of the 2014 winter wheat crop is nearing completion. The total area planted to wheat this year is officially estimated at a record level of 304 500 hectares, 11 percent above last year's level, which was reduced due to a delayed onset of seasonal rains. Assuming good weather conditions, and about average yields, FAO's preliminary forecasts point to a strong recovery from last year's lows, with the 2014 wheat production increasing by 22 percent to 450 000 tonnes.

Wheat imports forecast to increase sharply in the 2013/14 marketing year (October/September)

Wheat and rice are the two major cereals imported, mainly from the Russian Federation and Kazakhstan. Cereal imports in the 2013/14 marketing year (October/September) are forecast to increase by one-third from last year's low level and reach 156 000 tonnes. The increase reflects larger wheat imports, which are expected to grow by 50 percent to 120 000 tonnes, due to lower domestic availabilities. Rice imports in 2014 are anticipated to remain at last year's average level.

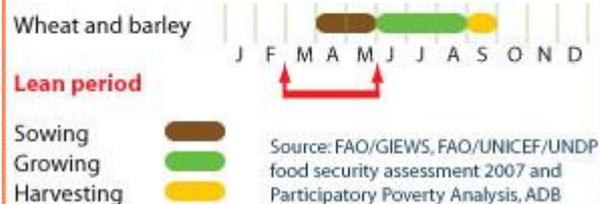
Prices of beef and mutton on the increase

The price for wheat flour, which remained relatively stable between December 2013 and March 2014, increased in April, reflecting the peak of the lean season and higher export prices in the Russian Federation, the country's main supplier. In Ulaanbaatar the capital city market, prices of wheat flour in April were 12 percent above last year's level. Bread prices, generally subsidized, have remained comparatively stable since March 2013.

Prices of beef and mutton meat in Ulaanbaatar continued their upward trend of the last six months, reaching near-record levels in April. Continued strong domestic demand, associated with the economic growth, is supporting prices.

According to the Central Bank of Mongolia, the overall inflation in April 2014 reached 12.3 percent on yearly basis.

Mongolia Crop calendar

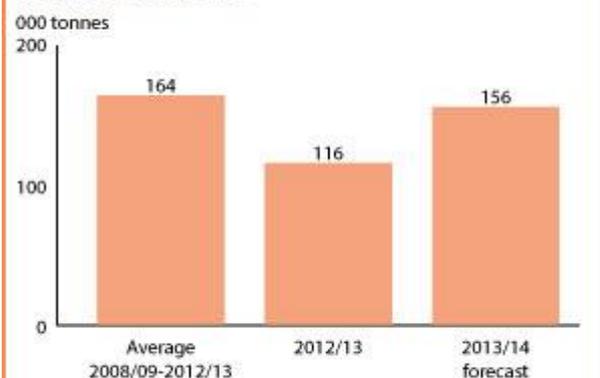


Mongolia Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes		percent	
Wheat	400	368	450	22
Barley	5	7	7	0
Oats	4	5	5	0
Others	0	0	0	0
Total	409	380	462	22

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

Mongolia Total cereal imports

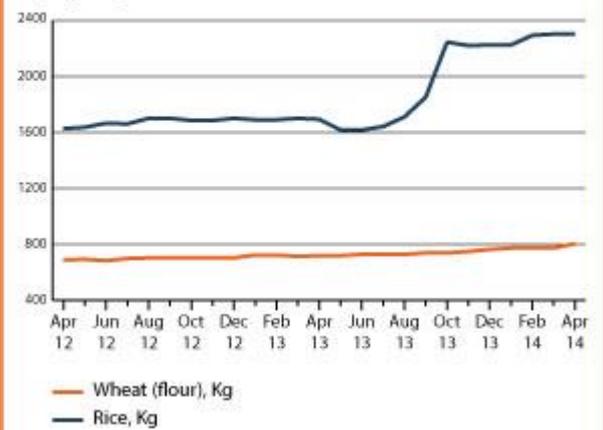


Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Mongolia

Selected food prices in Ulaanbaatar

Tugrik per Kg

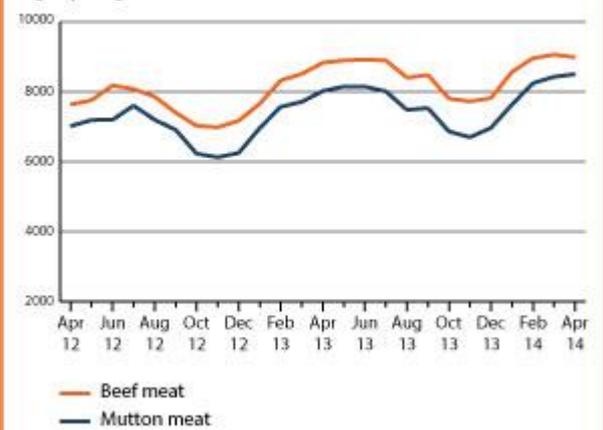


Source: National Statistical Office of Mongolia

Mongolia

Selected retail meat prices in Ulaanbaatar

Tugrik per Kg



Source: National Statistical Office of Mongolia

Reference Date: 06-February-2014

FOOD SECURITY SNAPSHOT

- Reduced 2013 wheat harvest
- Wheat imports forecast to increase during 2013/14 marketing year
- Livestock numbers have recovered
- Prices of wheat flour generally stable, while those of beef and mutton decrease seasonably

Reduced 2013 wheat harvest

Harvesting of the 2013 main season crops, mainly wheat, was completed in September. Despite intentions at the start of the season to increase the area to wheat, below-average rains from March to mid-June, reduced plantings to 276 000 hectares, some 7 percent below area sown in 2012. Furthermore, excessive rains from July to August and hail in early August reduced yields in wheat producing areas, such as Arkhangai, Bulgan and Selenge aimags. As a consequence, the 2013 wheat production is officially estimated at 369 000 tonnes, some 20 percent below the 2012 record level but similar to the previous five-year average.

Wheat and rice are the two major cereals imported, mainly from the Russian Federation, China and Kazakhstan. Given the lower harvest in 2013, cereal import requirements in 2013/14 marketing year (October/September) are forecast to reach 156 000 tonnes, some one-third above the previous year's low level. In January 2014, the Government proposed removal of import duty and VAT on the imports of 100 000 tonnes of wheat to build national wheat reserves. Annual rice imports amount to about 30 000 tonnes.

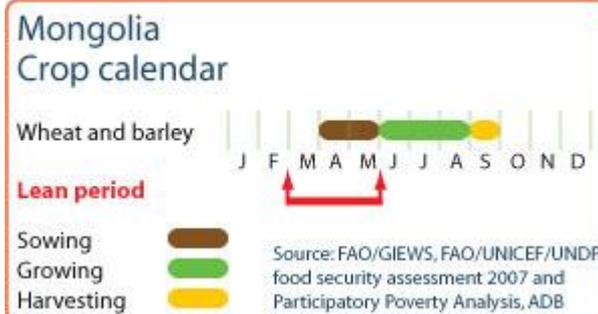
Livestock numbers have recovered

The total livestock numbers have recovered since the *Dzud* in 2009/10. As of the end of 2013, the total number of animals were estimated at 45.1 million, slightly above the pre-disaster level. According to some sources, lower levels of animals per hectare of land are considered to be more ecologically sustainable in some aimags.

Prices of wheat flour stable, while those of beef and mutton decrease seasonably

The price for wheat flour, the main food staple in the country, has remained relatively stable since April 2011. Similarly, bread prices, generally subsidized in the capital city Ulaanbaatar, have remained comparatively stable since March 2013. Prices of potatoes have been decreasing since April 2013 and in November 2013 were 18 percent below last year's level, mainly reflecting adequate supplies.

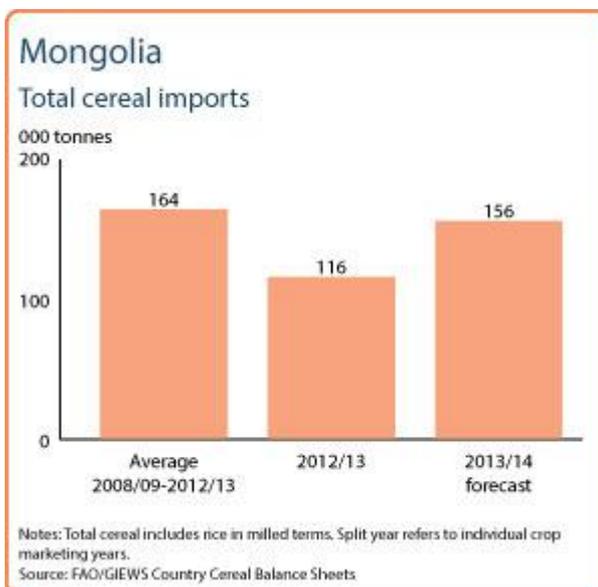
Prices of beef and mutton meat in Ulaanbaatar capital city market decreased seasonably in November from the month before and were 11 and 9 percent respectively higher than a year earlier, mainly due to continued strong growth of domestic demand. Meat prices in Ulaanbaatar capital city market follow the usual seasonal lows during October-December and highs during May-July.



Mongolia Cereal production

	2008-2012 average	2012	2013 estimate	change 2013/2012
	000 tonnes		percent	
Wheat	368	462	369	-20
Barley	4	7	7	0
Oats	3	5	5	0
Others	0	0	0	0
Total	375	474	381	-20

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



According to the Central Bank of Mongolia, the overall inflation in December 2013 reached 12.5 percent on yearly basis.



Reference Date: 18-December-2013

FOOD SECURITY SNAPSHOT

- Lower 2013 wheat harvest estimated
- Wheat imports forecast to increase during 2013/14 marketing year
- Breeding stock numbers have recovered
- Prices of wheat flour generally stable, while those of beef and mutton decrease seasonably

Lower 2013 wheat harvest estimated

Harvesting of the 2013 main season crops, mainly wheat, was completed in September. Despite intentions at the start of the season to increase the area to wheat, below-average rains from March to mid-June, reduced plantings to 276 000 hectares, some 7 percent below sowings in 2012. Furthermore, continuous rains from July to August and hail in early August reduced somewhat yields in some major wheat producing areas, including Arkhangai, Bulgan and Selenge aimags. As a consequence, the 2013 wheat production is estimated at 404 600 tonnes, some 12 percent below the 2012 record level but 10 percent above the previous five-year average.

Wheat and rice are the two major cereals imported, mainly from China and the Russian Federation. Given the lower harvest in 2013, wheat import requirements in 2013/14 marketing year (October/September) are forecast to reach 97 000 tonnes, some 21 percent above the previous year's low level. Rice imports are estimated to remain unchanged at 30 000 tonnes.

Breeding stock numbers have recovered

The numbers of breeding animals have recovered since the *Dzud* in 2009/10. As of the end of September 2013, the breeding stock heads were estimated at 15.3 million, slightly above the pre-disaster level. According to some sources, lower levels of animals per hectare of land are considered to be more ecologically sustainable in some aimags.

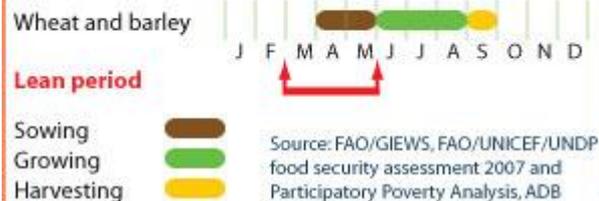
Prices of wheat flour stable, while those of beef and mutton decrease seasonably

The price for wheat flour, the main food staple in the country, has remained relatively stable since April 2011. Similarly, bread prices, generally subsidized in the capital city Ulaanbaatar, have remained comparatively stable since March 2013. Prices of potatoes have been decreasing since April 2013 and in November 2013 were 18 percent below last year's level, mainly reflecting adequate supplies.

Prices of beef and mutton in Ulaanbaatar capital city market decreased seasonably in November from the month before and were 11 and 9 percent respectively higher than a year earlier, mainly due to continued strong growth of domestic demand. Meat prices in Ulaanbaatar capital city market follow the usual seasonal lows during October-December and highs during May-July.

According to the Central Bank of Mongolia, the overall inflation in November 2013 reached 12 percent on yearly basis.

Mongolia Crop calendar

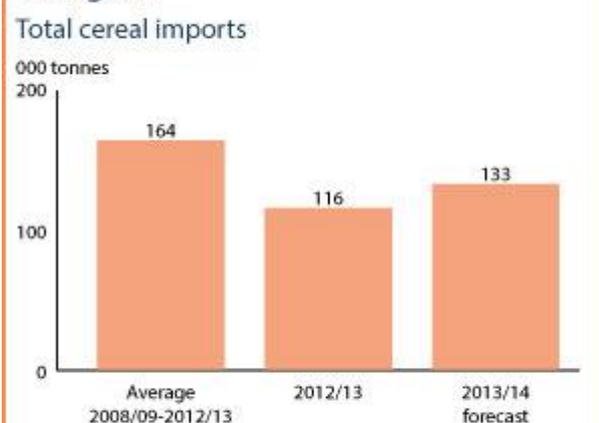


Mongolia Cereal production

	2008-2012 average	2012	2013 estimate	change 2013/2012
	000 tonnes		percent	
Wheat	368	462	405	-12
Barley	4	7	7	0
Oats	3	5	5	0
Others	0	0	0	0
Total	375	474	417	-12

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

Mongolia Total cereal imports

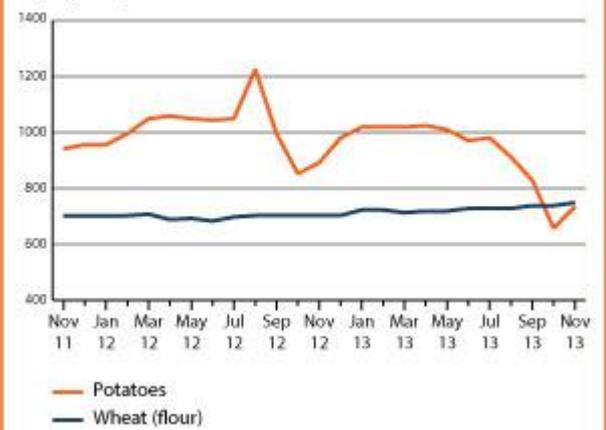


Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Mongolia

Selected retail food prices in Ulaanbaatar

Tugrik per Kg

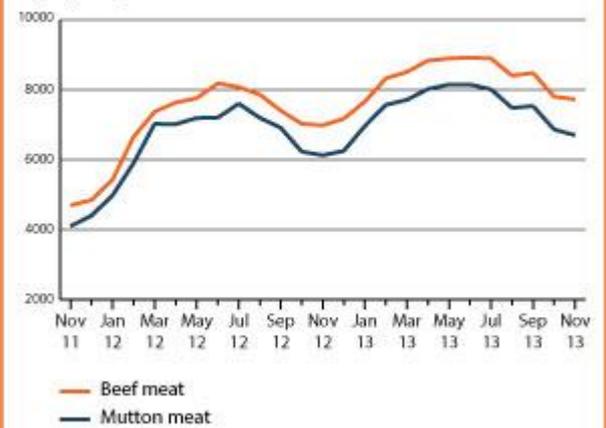


Source: National Statistical Office of Mongolia

Mongolia

Selected retail meat prices in Ulaanbaatar

Tugrik per Kg



Source: National Statistical Office of Mongolia

Reference Date: 14-February-2013

FOOD SECURITY SNAPSHOT

- Record 2012 wheat harvest is officially estimated
- Wheat imports are forecast to reach the lowest level on record
- Livestock numbers have almost recovered but still remain below the pre-2009 natural disaster levels
- Prices of rice and wheat flour generally stable but the inflation rates remain high

Record 2012 wheat harvest is officially estimated

Harvesting of the main season crops, mainly wheat, barley and oats, was completed in September. The total wheat production is officially estimated at a record level of 465 294 tonnes, some 7 percent above the 2011 another record output, mainly reflecting favourable weather conditions throughout the growing period from April to August 2012.

Wheat and rice are the two major cereals imported, mainly from China and the Russian Federation. The country experiences an increase in wheat production for the fifth consecutive year (since 2008) and given the record harvest in 2012, wheat import requirements are forecast to reach the lowest level at 81 000 tonnes during the 2012/13 marketing year (October/September). Rice imports are estimated to remain similar to the last year's level of 30 000 tonnes.

Livestock numbers have almost recovered but remain below the pre-2009 natural disaster levels

The total livestock and breeding animal numbers have recovered since the *Dzud* in 2009/10 but are still below the pre-disaster levels. At the end of 2012, the total number of animals was 40.9 million down from 44 million at the end of 2009. Similarly, breeding stock heads are currently estimated at 13.7 million down by 1.6 million from 2009. According to some sources, lower levels of animals per hectare of land are considered to be more ecologically desirable and sustainable.

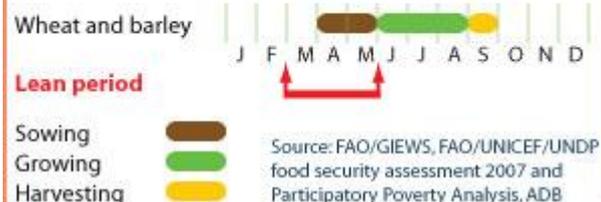
Prices of rice and wheat flour generally stable but the inflation rates remain high

According to the Central Bank of Mongolia, the consumer price index (CPI) in December 2012 reached 14 percent on yearly basis.

The price for wheat flour, the main food staple in the country, has however remained relatively stable since November 2011. Similarly, prices of rice show comparatively stable trends in recent months. Bread prices, generally subsidized in the capital city Ulaanbaatar, are more stable and below the wheat flour prices.

Prices for beef and mutton decreased since their peaks in mid-2012 and have stabilized in recent months. They remain, nonetheless, 48 and 42 percent higher, respectively, than a year earlier, due to decreased supply as result of exceptional livestock losses from the past *Dzud* and continued strong growth of domestic demand. Meat prices in Ulaanbaatar capital city market follow the usual seasonal lows during October-December and highs during May-July.

Mongolia Crop calendar

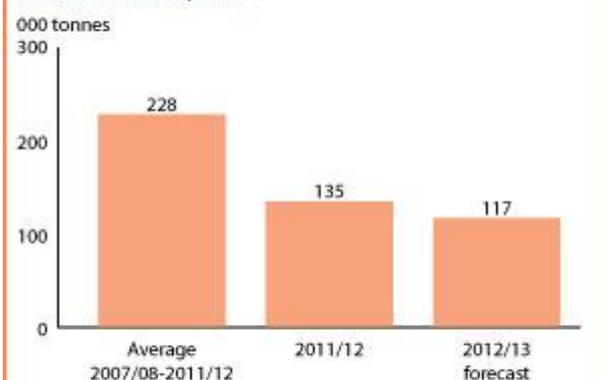


Mongolia Cereal production

	2007-2011 average	2011	2012 estimate	change 2012/2011
	000 tonnes		percent	
Wheat	298	436	465	7
Oats	4	4	5	25
Barley	4	6	7	17
Others	0	0	0	0
Total	306	446	477	7

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

Mongolia Total cereal imports

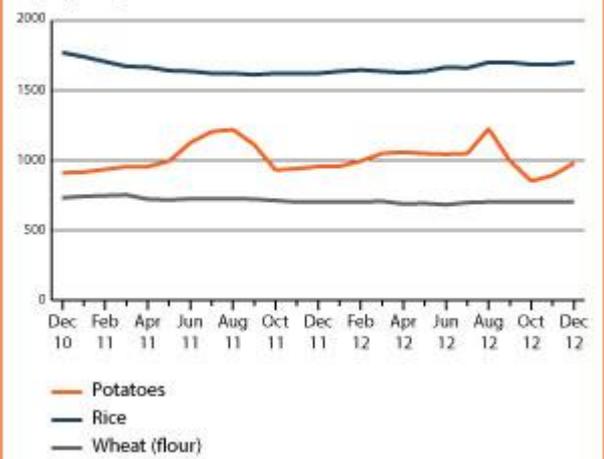


Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Mongolia

Selected retail food prices in Ulaanbaatar

Tugrik per Kg

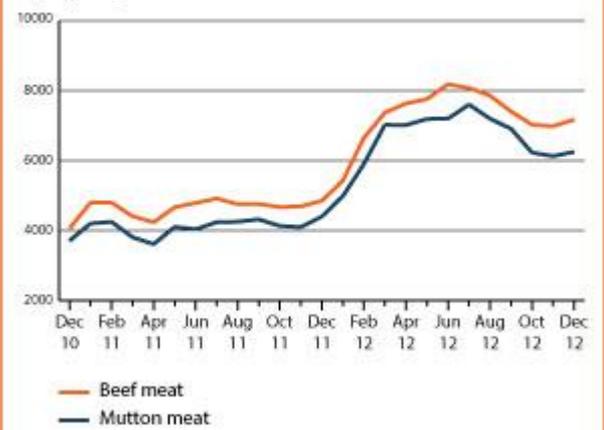


Source: National Statistical Office of Mongolia

Mongolia

Selected retail meat prices in Ulaanbaatar

Tugrik per Kg



Source: National Statistical Office of Mongolia

Reference Date: 19-September-2012

FOOD SECURITY SNAPSHOT

- Record 2012 wheat harvest is estimated. With sharp increases in cereal production in last five years, imports have steadily declined.
- Livestock numbers have partially recovered but still remain below the pre-2009 natural disaster levels
- Prices of rice and wheat flour have remained stable for several months but overall inflation is almost 15 percent

Record 2012 wheat harvest is estimated

Harvesting of the main season crops, mainly wheat, barley and oats, is just underway and is expected to continue until the end of September.

The total wheat production is officially estimated at a record level of 468 000 tonnes, some 7 percent above the 2011 bumper output, mainly reflecting favourable weather conditions throughout the growing period from April to August 2012 across most of the country.

The country experiences an increase in wheat production for the fifth consecutive year (since 2008) during these years of high economic growth. Consequently, the cereal imports have declined in last five years.

Wheat and rice are the two major cereals imported, mainly from China and Russia. Given the relatively favourable production estimates, the total cereal imports for the 2012/13 marketing year (October/September) are forecast to stabilize at about 126 000 tonnes.

Livestock numbers have partially recovered but still remain below the pre-2009 natural disaster levels

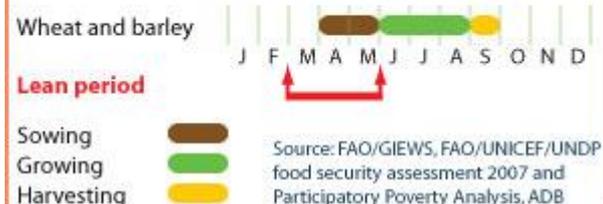
The total livestock and breeding animal numbers have recovered since the *Dzud* in 2009/10 but are still below the pre-disaster levels. At the end of 2011, the total number of animals was 36.3 million down from 44.0 million at the end of 2009. Similarly, breeding stock heads are currently estimated at 13.1 million down by 2.2 million from 2009. The livelihood and food security of the affected half a million rural people because the 2009/10 *Dzud* are slowly being restored.

Prices of rice and wheat flour have remained stable for several months but the overall inflation is almost 15 percent

The year-on-year consumer price inflation (CPI) in August 2012 was estimated at 14.9 percent. However, the price for wheat flour, the main food staple in the country, has remained relatively stable since November 2011 and in August 2012 it was some 3 percent below the same month last year. The country imports about one-third of its annual wheat consumption requirements.

Similarly, prices of rice show comparatively stable trends in recent months.

Mongolia Crop calendar

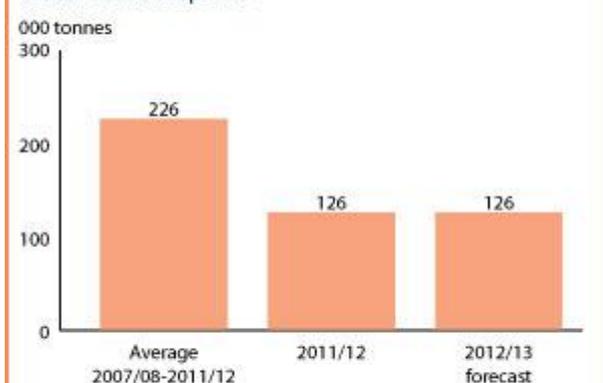


Mongolia Cereal production

	2007-2011 average	2011	2012 forecast	change 2012/2011
	000 tonnes		percent	
Wheat	298	436	468	7
Oats	4	4	5	25
Barley	4	6	7	17
Others	0	0	0	0
Total	306	446	480	8

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

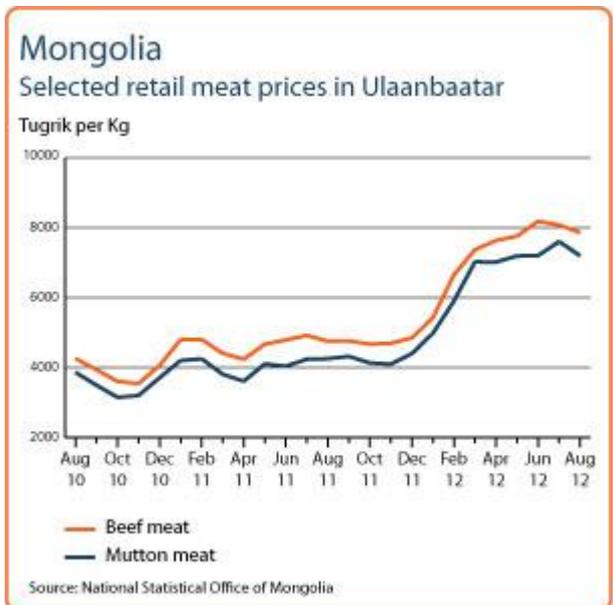
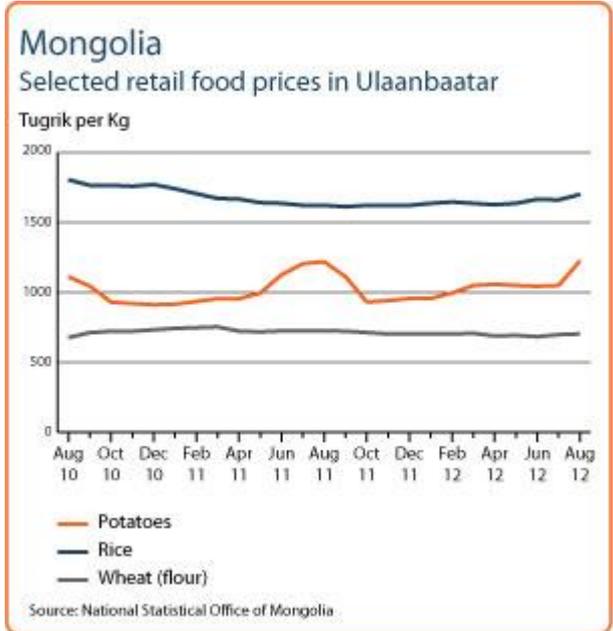
Mongolia Total cereal imports



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

Bread prices, generally subsidized in the capital city Ulaanbaatar, are more stable and below the wheat flour prices.

In August 2012, prices for beef and mutton were slightly lower than the month before but nonetheless remained 65 and 69 percent higher, respectively, than a year earlier, due to decreased supply following the exceptional livestock losses from the *Dzud* in 2010 and rise in demand during this economic growth period. The prices in Ulaanbaatar capital city market follow the usual seasonal lows during October-December and highs during May-July.



Reference Date: 11-July-2012

FOOD SECURITY SNAPSHOT

- Good rains favour the current cropping season
- Record cereal harvest was estimated for 2011
- Livestock numbers have partially recovered but still remain below the pre-2009 natural disaster levels
- Prices of rice and wheat flour have remained stable for several months but overall inflation is over 15 percent

Good rains favour the current cropping season

Planting of the 2012 main season crops, mainly wheat, was completed in May. Based on remote sensing data, good rains since the start of the cropping season (April-June) and satisfactory vegetation conditions, point to a favourable situation for the 2012 cereal crop.

Record cereal wheat in 2011

The 2011 wheat production was officially estimated at a record level of 435 889 tonnes, 26 percent up from the previous year's good output, mainly reflecting an increase in the planted area.

Wheat and rice are the two main cereals imported. Owing to the record wheat harvest in 2011, the total cereal imports for the 2011/12 marketing year (October/September) are forecast at 116 000 tonnes or 19 percent below the previous year's level.

Livestock numbers have partially recovered but still remain below the pre-2009 natural disaster levels

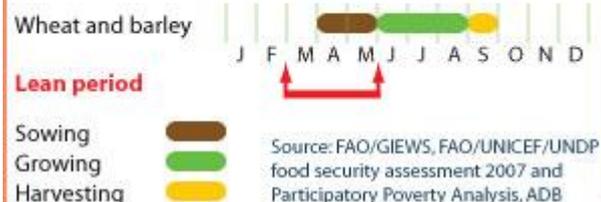
The total livestock and breeding animal numbers have recovered since the *Dzud* in 2009/10 but are still below the pre-disaster levels. At the end of 2011, the total number of animals was 36.3 million down from 44.0 million at the end of 2009. Similarly, breeding stock heads are currently estimated at 13.1 million down by 2.2 million from 2009. The livelihood and food security of the affected half a million rural people because the 2009/10 *Dzud* are slowly being restored.

According to the National Statistical Office of Mongolia, the country experienced a growth in GDP of 16.7 percent in the first quarter of 2012, mainly due to favourable international prices of its export commodities, copper and gold in particular.

Prices of rice and wheat flour have remained stable for several months but the overall inflation is over 15 percent

The year-on-year consumer price inflation (CPI) in May 2012 was estimated at 15.4 percent. However, the price for wheat flour, the main food staple in the country, has remained relatively stable since November 2011 and in May 2012 it was almost 4 percent below the same month last year. The country imports about one-third of its annual wheat consumption requirements, and the recent price declines reflect the trend in the international markets in the past months.

Mongolia Crop calendar

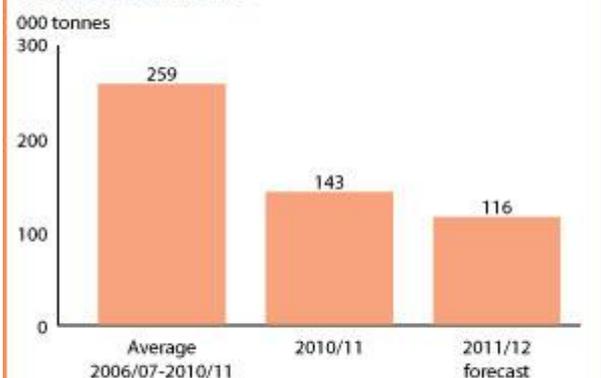


Mongolia Cereal production

	2007-2011 average	2011	2012 forecast	change 2012/2011
	000 tonnes		percent	
Wheat	298	436	450	3
Oats	4	4	5	25
Barley	4	6	7	17
Others	0	0	0	0
Total	306	446	462	4

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

Mongolia Total cereal imports

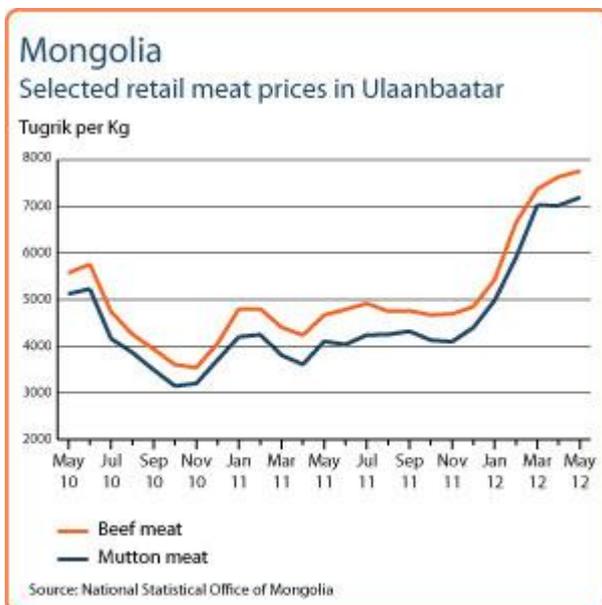
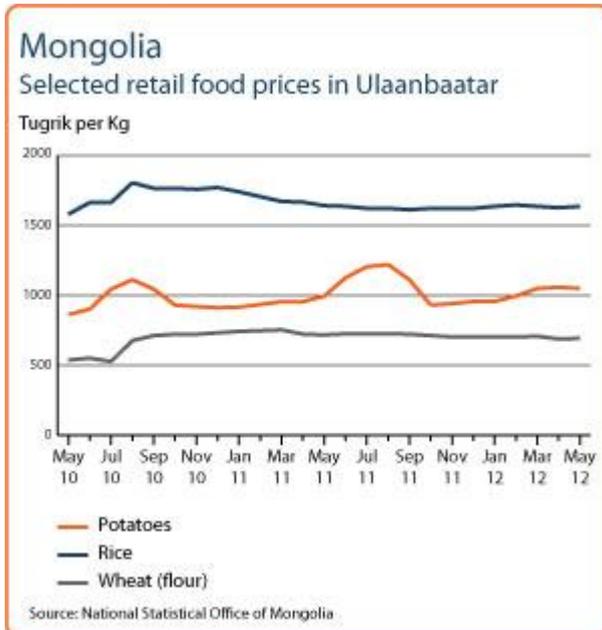


Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Similarly, prices of rice show comparatively stable trends in recent months.

Bread prices, generally subsidized in the capital city Ulaanbaatar, are more stable and below the wheat flour prices.

In May 2012, prices for beef and mutton were 66 and 75 percent higher respectively than a year earlier, due to increased demand and the exceptional livestock losses following the *Dzud* in 2010. The prices in Ulaanbaatar capital city market follow the usual seasonal lows during October-December and highs during May-July.



Reference Date: 14-February-2012

FOOD SECURITY SNAPSHOT

- Record cereal harvest is estimated for 2011
- Livestock numbers have partially recovered but still remain below the pre-2009 natural disaster levels
- Prices of rice and wheat (flour) have remained stable for several months but overall inflation is over 10 percent

Record cereal harvest is estimated for 2011

Harvesting of the main season crops, mainly wheat, barley and oats, was completed in September. The total wheat production is officially estimated at a record level of 435 889 tonnes, 26 percent from the previous year's good output, mainly reflecting the increase in the planted area. Small amount of barley and oats are also produced.

Wheat and rice are the two main cereals imported. Owing to the record wheat harvest this year, the total cereal imports for 2011/12 are forecast at 116 000 tonnes or 19 percent below the previous year's level.

Current livestock numbers have partially recovered but still remain below the pre-2009 natural disaster levels

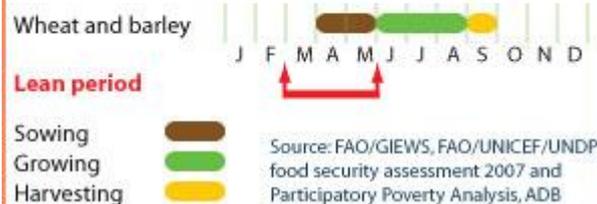
Livestock raising is the dominant agricultural activity and one of country's key economic sectors. The total livestock and the breeding animal numbers have recovered in since the *Dzud* in 2009/10 but are still below the pre-disaster levels. For example, at the end of 2011, the total number of animals was 36.3 million down from 44.0 million at the end of 2009. Similarly, the breeding stock heads are currently estimated at 13.1 million down by 2.2 million since 2009. The livelihood and food security of the affected half a million rural people because the 2009/10 *Dzud* have slowly being restored. However, the lingering effects of the livestock losses still weigh high on the livelihood of those affected and would take sustained effort to overcome.

According to the statistics from the Mongolian national Statistics Office, the country experienced a growth in GDP increased by 9.7 percent in the first half of 2011 after an increase of 6.1 percent last year, mainly due to the favourable international prices of its export commodities, copper and gold in particular.

Prices of rice and wheat (flour) have remained stable for several months but the overall inflation is over 10 percent

The year-on-year consumer price inflation in December 2011 was estimated at 10.2 percent. However, the price for wheat flour, the main food staple in the country, has remained relatively stable since September 2010 and decreased slightly December. Price of rice, which has been stable since July 2011, in December decreased by 8.4 percent from the same month last year. The country imports about one-third of its annual wheat consumption requirements, and the recent price declines reflect the trend in the international price in the past

Mongolia Crop calendar

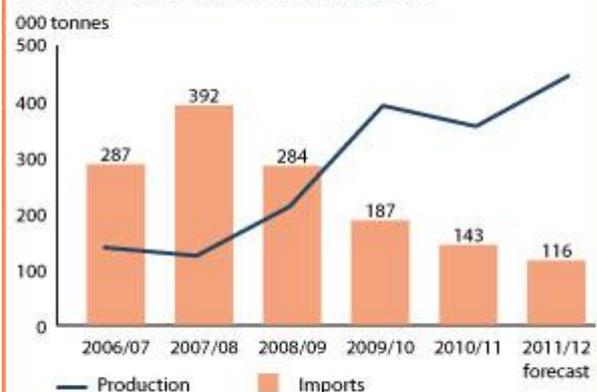


Mongolia Cereal production

	2006-2010 average	2010	2011 estimate	change 2011/2010
	000 tonnes		percent	
Wheat	236	346	436	26
Barley	4	6	6	0
Oats	4	3	4	33
Others	0	0	0	0
Total	244	355	446	26

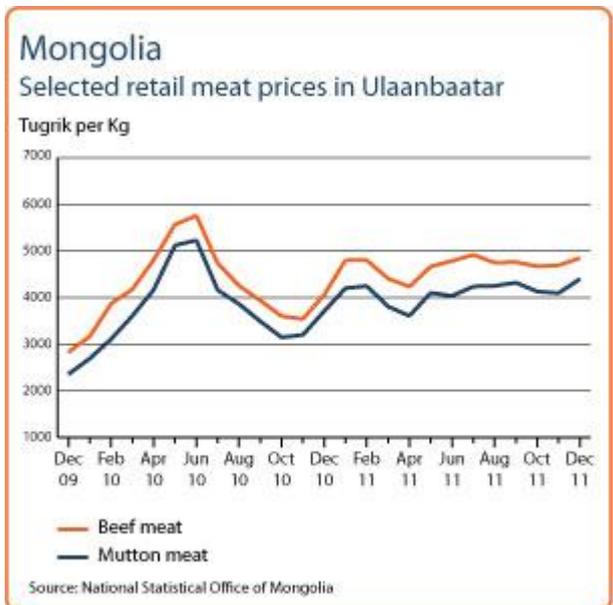
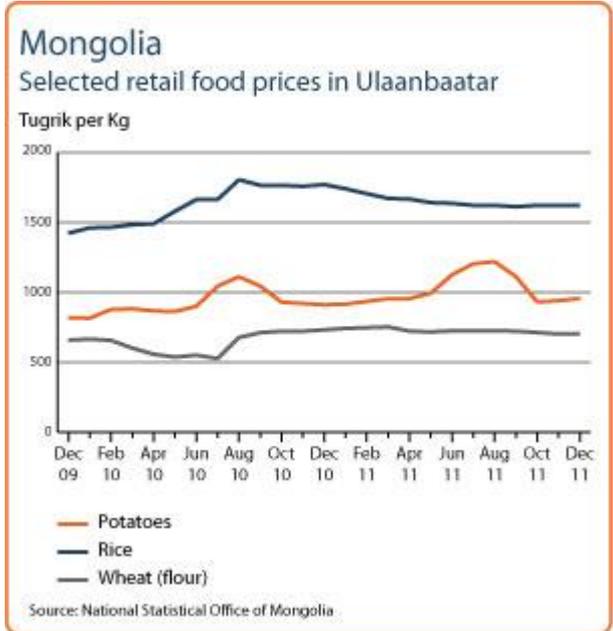
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Mongolia Total cereal production and imports



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

months. Bread prices, generally subsidised in the capital city Ulaanbaatar, are more stable and below the wheat flour prices. Beef and mutton prices in Ulaanbaatar capital city market follow the usual seasonal lows during October-December and highs during May-July. However the increases have been much more marked in 2010 and 2011 due to exceptional livestock losses following the *Dzud* earlier.



Reference Date: 22-December-2011

FOOD SECURITY SNAPSHOT

- Record cereal harvest is estimated for 2011
- Livestock numbers have almost recovered following the aftermath of the 2009 natural disaster
- Prices of rice and wheat (flour) have remained stable for several months but consumer price inflation is over 10 percent per annum

Record cereal harvest is estimated for 2011

Harvesting of the main season crops, mainly wheat, barley and oats, was completed in September. The total wheat production is officially estimated at a record level of 445 300 tonnes, 28.6 percent from the previous year's good output, mainly reflecting the increase in the planted area. Small amount of barley and oats are also produced.

Wheat and rice are the two main cereals imported. Owing to the record wheat harvest this year, the total cereal imports for 2011/12 are forecast at 108 000 or 24.5 percent below the previous year's level.

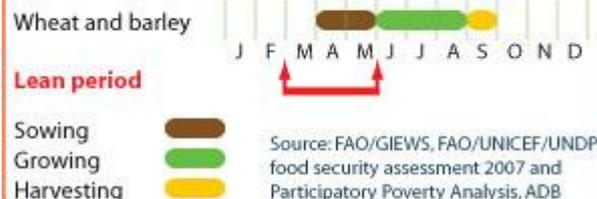
Livestock numbers have almost recovered following the aftermath of the 2009 natural disaster

Livestock raising is the dominant agricultural activity and one of country's key economic sectors. The breeding animal numbers have gone up from 10.5 million in September 2010 to 13.0 million by September 2011, recovering from the impact of the *Dzud* in 2009/10. The livestock numbers have risen to approximately 43 million. The livelihood and food security of the affected half a million rural people because the 2009/10 *Dzud* have slowly being restored. However, the lingering effects of the livestock losses still weigh high on the livelihood of those affected and would take sustained effort to overcome. According to the statistics from the Mongolian national Statistics Office, the country experienced a growth in GDP increased by 9.7 percent in the first half of 2011 after an increase of 6.1 percent last year, mainly due to the favourable international prices of its export commodities, copper and gold in particular.

Prices of rice and wheat (flour) have remained stable for several months but the overall consumer price inflation is over 10 percent per annum

The year-on-year consumer price inflation in November 2011 was 10.8 percent. However, the price for wheat flour, the main food staple in the country, has remained relatively stable since August 2010, but decreased slightly November. Price of rice in November decreased by 8 percent from the same month last year. It has been stable between June and October 2011. The country imports about one-third of its annual wheat consumption requirements, and the recent price declines reflect the decline in the international price in the past two months. Bread prices, generally subsidised in the capital city Ulaanbaatar, are more stable and below the wheat flour prices. Beef and mutton prices in Ulaanbaatar capital city market follow the usual seasonal lows during October-December and highs during May-July. However the increases have been much more marked in 2010 and 2011 due to exceptional

Mongolia Crop calendar

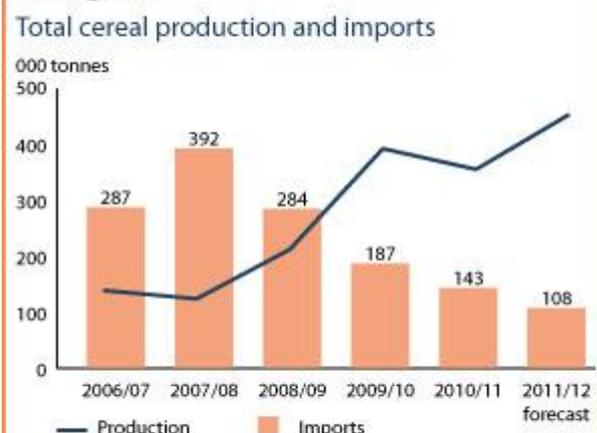


Mongolia Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes		percent	
Wheat	236	346	445	29
Barley	4	6	5	-17
Oats	4	3	3	0
Others	0	0	0	0
Total	244	355	453	28

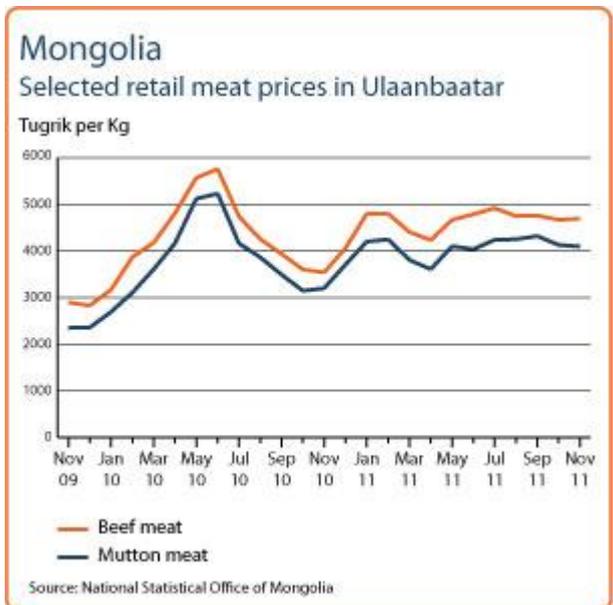
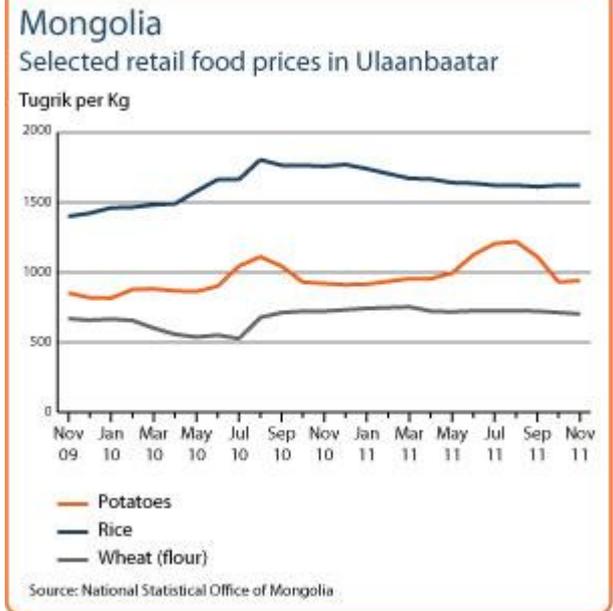
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Mongolia Total cereal production and imports



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

livestock losses following the *Dzud* earlier.



Reference Date: 23-May-2011

FOOD SECURITY SNAPSHOT

- The revised 2010 wheat production at 346 000 tonnes is slightly below the record harvest of 2009 but still well above average
- Livestock numbers in 2010 are reduced by over 11 million or more than a quarter of its stock due to the 2009 severe winter
- By April 2011, the year-on-year economic growth was estimated at 10 percent and staple food prices have remained stable in recent months

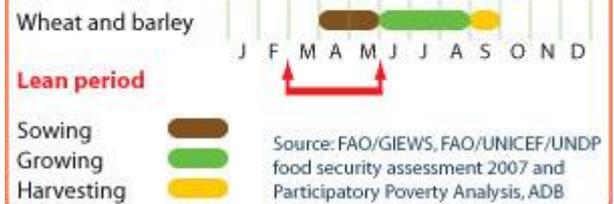
The revised 2010 wheat production at 346 000 tonnes is slightly below the record harvest of 2009 but still well above average

Planting of the 2011 summer crops, mainly wheat which began in April is currently nearing completion. The last crop was harvested in September 2010 and according to the official sources, the total wheat production is estimated at 346 000 tonnes. Although this is about 11 percent below the previous year's record production, it is significantly above the previous five year average. The final estimate indicates that the reduction in production was mainly due to the yields which returned to normal levels, while the area under wheat was virtually unchanged. Total area planted to all crops in 2010 was up by 12 percent. Hence the area under other crops (such as other cereals, vegetables, and potatoes) more than doubled. This shift to crop cultivation is probably a reaction to the devastated livestock sector due to the adverse weather of 2009/10 winter season. The cereal import requirement for 2010/11 marketing year (Oct./Sept.) is estimated to increase slightly from the bumper crop year 2009/10. Wheat and rice are the two main cereals imported. The country's harsh climate and very short growing season make it heavily dependent on imports for many food items.

Livestock numbers are slowly building back following the aftermath of the 2009 natural disaster

Livestock raising is the dominant agricultural activity and one of country's key economic sectors. As seen from table below, the number of animals in 2010 stood at 32.7 million, indicating a reduction in the total head count by some 11 million, primarily a result of the unusually harsh weather. Breeding animal numbers have gone up from 7.0 million in April 2010 to 9.7 million by April 2011 but some ways to go to reach the level of over 11.2 million before the disaster. The livelihood and food security, of the affected half a million rural people are slowly being restored. However, the lingering effects of the livestock losses still weigh high on the livelihood of those affected and would take sustained effort to overcome. The country experienced a significant year-on-year economic growth of about 10 percent in April 2011.

Mongolia Crop calendar

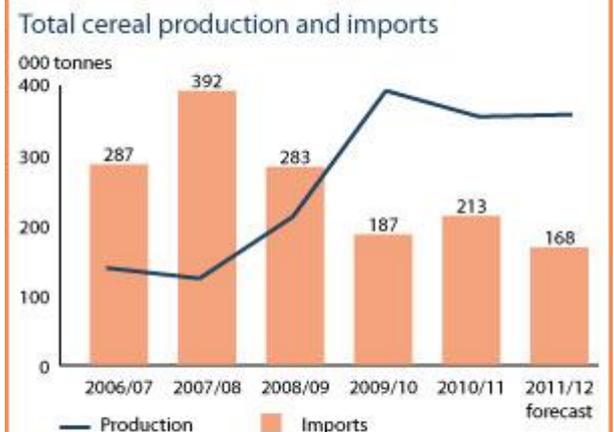


Mongolia Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes		percent	
Wheat	236	346	350	1
Barley	4	6	5	-17
Oats	4	3	3	0
Others	4	3	3	0
Total	244	355	358	1

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

Mongolia Total cereal production and imports



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

Mongolia livestock statistics

	2009	2010	% Change 2010/2009
Average livestock per herdsman household	192	150	-22
Total livestock (in '000)	44 023.9	32 729.5	-2
- camel (in '000)	277.1	269.6	-3
- horse (in '000)	2 221.3	1 920.3	-14
- cattle (in '000)	2 599.3	2 176	-16
- sheep (in '000)	19 274.7	14 480.4	-25
- goats (in '000)	19 651.5	13 883.2	-29

Source: National Statistical Office, Mongolia. Monthly Bulletin of Statistics, December 2010

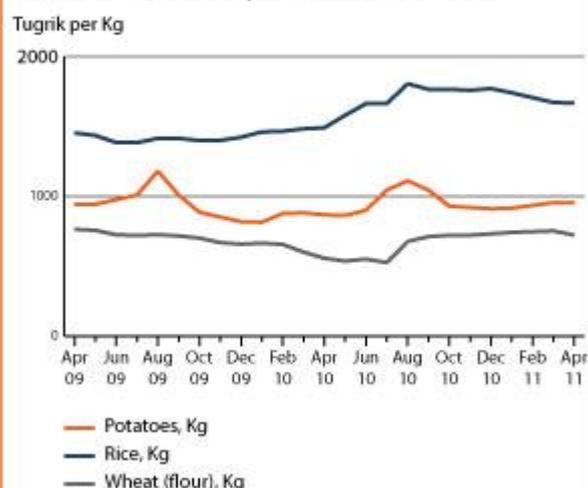
According to NSO, between 2005 and 2008 the country experienced a growth in GDP of 30 percent or an annual average rate of about 9 percent, mainly due to the favourable international prices of its export commodities, copper and gold in particular. GDP in 2009, however, is contracted by 1.6 percent over the previous year due to declining export prices of minerals.

Staple food prices have remained stable in recent months

The year-on-year consumer price inflation in February 2010 was 11 percent. Prices of wheat flour, the main food staple in the country, and rice have remained stable but at elevated levels in recent months. Bread prices, generally subsidised in the capital city Ulaanbaatar, are more stable and below the wheat flour prices. Beef and mutton prices in Ulaanbaatar capital city market follow the usual seasonal lows during October-December and highs during May-July. However the increases have been much more marked in 2010 and 2011 due to exceptional livestock losses following the *Dzud* earlier. Consequently, this summer prices are likely to remain higher than usual.

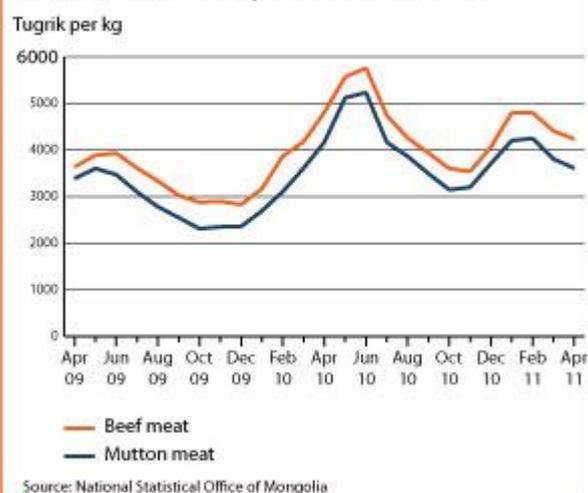
Mongolia

Selected retail food prices in Ulaanbaatar



Mongolia

Selected retail meat prices in Ulaanbaatar



Reference Date: 28-March-2011

FOOD SECURITY SNAPSHOT

- The revised 2010 wheat production at 346 000 tonnes is slightly below the record harvest of 2009 but still well above average
- Livestock numbers in 2010 are reduced by over 11 million or more than a quarter of its stock due to the 2009 severe winter
- Staple food prices have remained stable in recent months

The revised 2010 wheat production at 346 000 tonnes is slightly below the record harvest of 2009 but still well above average

Planting of the 2011 summer crops, mainly wheat, will begin in April. The last crop was harvested in September 2010 and according to the official sources, the total wheat production is estimated at 346 000 tonnes. Although this is about 11 percent below the previous year's record production, it is significantly above the previous five year average. The final estimate indicates that the reduction in production was mainly due to the yields which returned to normal levels, while the area under wheat was virtually unchanged. Total area planted to all crops in 2010 was up by 12 percent. Hence the area under other crops (such as other cereals, vegetables, and potatoes) more than doubled. This shift to crop cultivation is probably a reaction to the devastated livestock sector due to the adverse weather of 2009/10 winter season. The cereal import requirement for 2010/11 marketing year (Oct/Sep) is estimated to increase slightly from the bumper crop year 2009/10. Wheat and rice are the two main cereals imported. The country's harsh climate and very short growing season make it heavily dependent on imports for many food items.

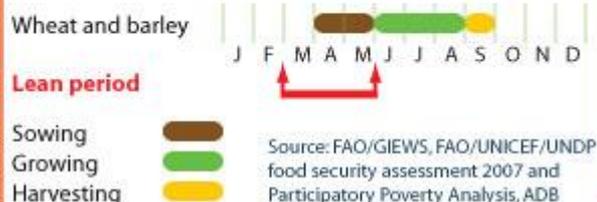
Livestock numbers are reduced by over 11 million or more than a quarter of its stock due to the 2009 severe winter conditions

Livestock raising is the dominant agricultural activity and one of country's key economic sectors. As seen from table below, the number of animals in 2010 stood at 32.7 million, indicating a reduction in the total head count by some 11 million, primarily a result of the unusually harsh weather. The livelihood and food security, especially of the rural population, some 500 000 people are adversely affected due to the natural disaster. The lingering effects of the livestock losses still weigh high on the livelihood of those affected and would take sustained effort to overcome.

Mongolia livestock statistics

	2009	2010	% Change 2010/2009
Average livestock per herdsman household	192	150	-22
Total livestock (in '000)	44 023.9	32 729.5	-2
- camel (in '000)	277.1	269.6	-3
- horse (in '000)	2 221.3	1 920.3	-14

Mongolia Crop calendar

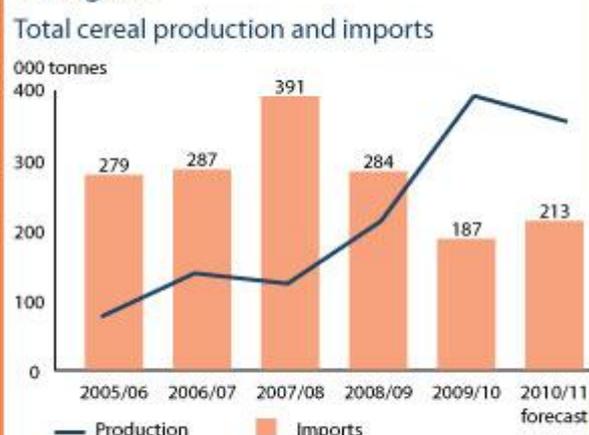


Mongolia Cereal production

	2005-2009 average	2009	2010 estimate	change 2010/2009
	000 tonnes			percent
Wheat	182	388	346	-11
Barley	4	2	6	200
Oats	3	2	3	50
Others	0	0	0	0
Total	189	392	355	-9

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

Mongolia Total cereal production and imports



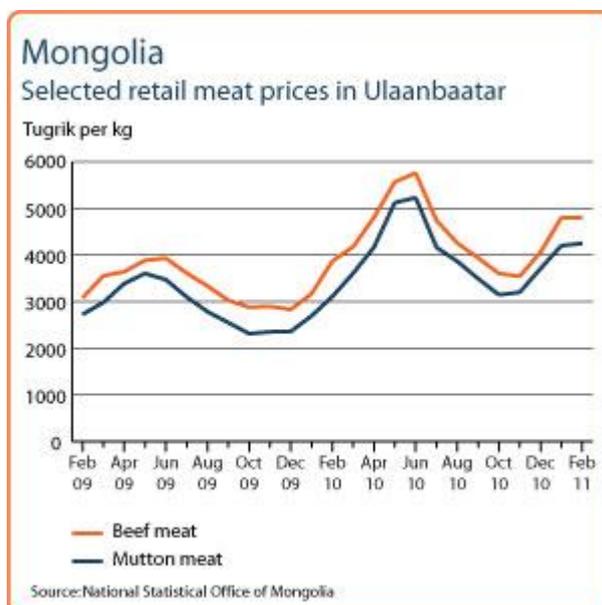
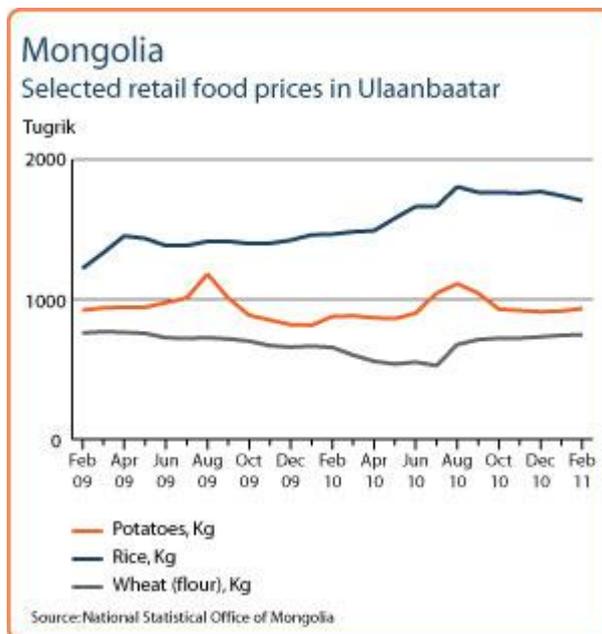
Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years. Source: FAO/GIEWS Country Cereal Balance Sheets

- cattle (in '000)	2 599.3	2 176	-16
- sheep (in '000)	19 274.7	14 480.4	-25
- goats (in '000)	19 651.5	13 883.2	-29
<u>Source:</u> National Statistical Office, Mongolia. Monthly Bulletin of Statistics, December 2010			

According to NSO, between 2005 and 2008 the country experienced a growth in GDP of 30 percent or an annual average rate of about 9 percent, mainly due to the favourable international prices of its export commodities, copper and gold in particular. GDP in 2009, however, is contracted by 1.6 percent over the previous year due to declining export prices of minerals.

Staple food prices have remained stable in recent months

The year-on-year consumer price inflation in February 2010 was 11 percent. Prices of wheat flour, the main food staple in the country, and rice have remained stable but at elevated levels in recent months. Bread prices, generally subsidised in the capital city Ulaanbaatar, are more stable and below the wheat flour prices. Beef and mutton prices in Ulaanbaatar capital city market follow the usual seasonal lows during October-December and highs during May-July. However the increases have been much more marked in 2010 and 2011 due to exceptional livestock losses following the *Dzud* earlier. Consequently, this summer prices are likely to remain higher than usual.



Reference Date: 3-September-2010

FOOD SECURITY SNAPSHOT

- Planted area for the current season is estimated to increase
- Livestock dependent households suffered serious loss due to severe winter condition, *Dzud*
- Total cereal harvest of 2009 officially estimated at a record level
- Staple prices have come down in 2009 but remain higher than the pre-crisis period

Planted area for the current season is estimated to increase

Planting of crops, mainly wheat, was completed in April and May. According to the official sources, total area planted this season is estimated to increase by 11 percent over the last year. Since wheat area increase is estimated at merely 2 percent, area under other crops (such as other cereals, vegetables, and potatoes), although very small in total, is estimated to more than double. This is probably a reaction to the devastated livestock sector due to the adverse weather of last winter season.

Livestock dependent households suffered serious loss due to severe winter condition, *Dzud*

Food security, especially of the rural population, is adversely affected due to the *Dzud* weather conditions. According to official estimate the unusually harsh weather resulted in deaths of nearly six million heads out of a total of 44 million livestock in the country and adversely affected livelihood of some 500 000 people. Livestock raising is the dominant agricultural activity and one of country's key economic sectors.

Mongolia livestock statistics

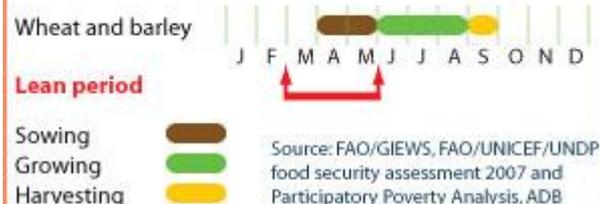
	2007	2008	2009
Number of households with livestock	226 116	227 547	226 649
Number of herdsmen households	171 588	171 124	170 142
Average number of livestock per herdsmen household	235	253	259
Losses of animals due to diseases (in '000)	71.7	109.3	135.1
Total livestock (in '000)	40 264	43 289	44 024
camel (in '000)			277
horse (in '000)			2 221
cattle (in '000)			2 599
sheep (in '000)			19 275
goats (in '000)			19 652
Total in terms of cattle units (in '000)			10 905

Source: National Statistical Office, Mongolia. Monthly Bulletin of Statistics, Dec. 2009.

Total cereal harvest of 2009 officially estimated at a record level

Harvesting of the 2009 wheat crop, virtually the only cereal produced in

Mongolia Crop calendar

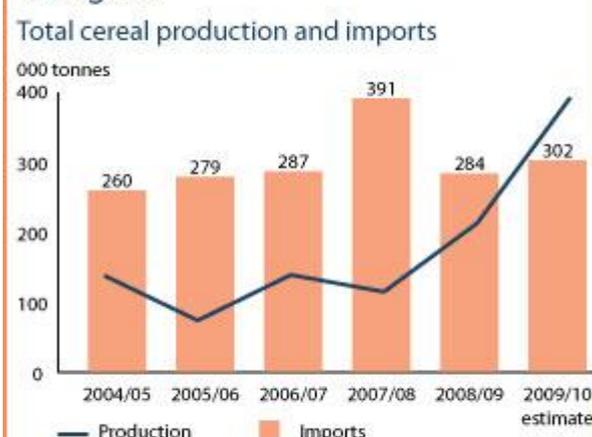


Mongolia Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Wheat	182	388	380	-2
Barley	3	2	3	50
Oats	1	1	0	-100
Others	0	0	0	0
Total	187	392	384	-2

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

Mongolia Total cereal production and imports



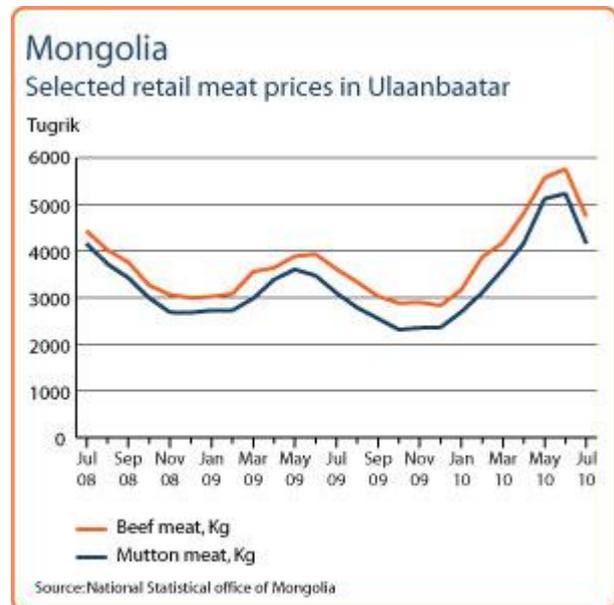
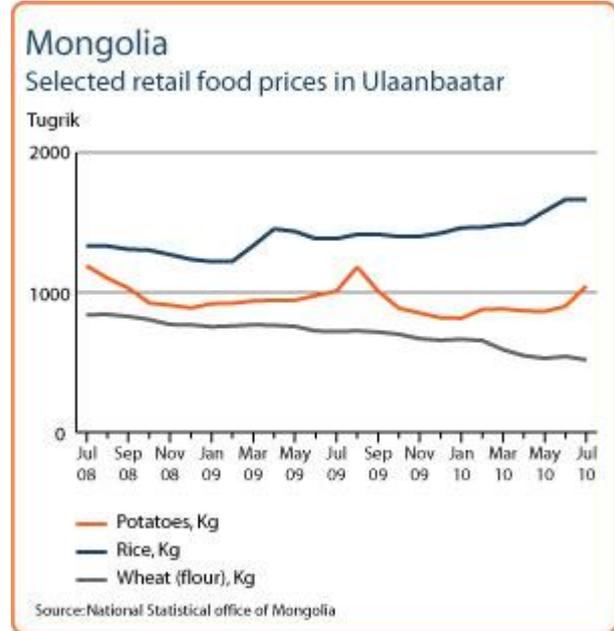
Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years. Source: FAO/GIEWS Country Cereal Balance Sheets

the country was completed in September. The official estimate of 2009 wheat harvest according to the National Statistical Office (NSO) of Mongolia at the end of December 2009 is 388 100 tonnes and total cereal harvest at 391 700 tonnes. This is more than double the drought affected output of 2008. Much of the wheat is produced under irrigation conditions. Hay production for 2009, on the other hand, is estimated by the Ministry of Agriculture at a poor level reducing fodder availability. As a result of the bumper harvest, imports of wheat would be reduced to some 70 000 tonnes in 2010 down from usual over 250 000 tonnes.

According to NSO, between 2005 and 2008 the country experienced a growth in GDP of 30 percent or an annual average rate of about 9 percent, mainly due to the favourable international prices of its export commodities, copper and gold in particular. GDP in 2009, however, is expected to decline due to declining export prices of minerals.

Staple prices came down in 2009 but remain higher than the pre-crisis period

Food security for large numbers of urban poor was significantly affected by the surging food prices in 2008 as the year-on-year inflation in the food subsector as a whole was 80.2 percent in June 2008. Prices of wheat flour, the main food staple in the country, have come down steadily since then but still remain higher than the pre-high food prices crisis period (June 2007). Bread prices, generally subsidised in the capital city Ulaanbaatar, are more stable and below the wheat flour prices, except since March 2010 when wheat flour price dropped. Rice prices on the other hand have remained high at the peak levels of mid-2008 international level and in local currency are at the highest level. Beef and mutton prices in Ulaanbaatar capital city market follow the usual seasonal lows during October-December and highs during May-July. However the increases have been much more marked this year due to exceptional livestock losses following the *Dzud* earlier. This summer prices are likely to remain higher for an extended period. The country's harsh climate and very short growing season make it heavily dependent on imports for many food items.



Reference Date: 12-July-2010

FOOD SECURITY SNAPSHOT

- Planted area for the current season is estimated to increase
- Livestock dependent households suffered serious loss due to severe winter condition, *Dzud*
- Total cereal harvest of 2009 officially estimated at a record level
- Staple prices have come down in 2009 but remain higher than the pre-crisis period

Planted area for the current season is estimated to increase

Planting of crops, mainly wheat, was completed in April and May. According to the official sources, total area planted this season is estimated to increase by 11 percent over the last year. Since wheat area increase is estimated at merely 2 percent, area under other crops (such as other cereals, vegetables, and potatoes), although very small in total, is estimated to more than double. This is probably a reaction to the devastated livestock sector due to the adverse weather of last winter season.

Livestock dependent households suffered serious loss due to severe winter condition, *Dzud*

Food security, especially of the rural population, is adversely affected due to the *Dzud* weather conditions. According to official estimate the unusually harsh weather resulted in deaths of nearly six million heads out of a total of 44 million livestock in the country and adversely affected livelihood of some 500 000 people. Livestock raising is the dominant agricultural activity and one of country's key economic sectors.

Mongolia livestock statistics

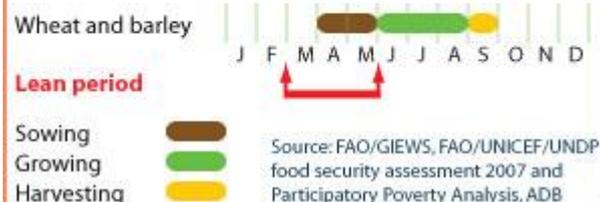
	2007	2008	2009
Number of households with livestock	226 116	227 547	226 649
Number of herdsman households	171 588	171 124	170 142
Average number of livestock per herdsman household	235	253	259
Losses of animals due to diseases (in '000)	71.7	109.3	135.1
Total livestock (in '000)	40 264	43 289	44 024
camel (in '000)			277
horse (in '000)			2 221
cattle (in '000)			2 599
sheep (in '000)			19 275
goats (in '000)			19 652
Total in terms of cattle units (in '000)			10 905

Source: National Statistical Office, Mongolia. Monthly Bulletin of Statistics, Dec. 2009.

Total cereal harvest of 2009 officially estimated at a record level

Harvesting of the 2009 wheat crop, virtually the only cereal produced in

Mongolia Crop calendar



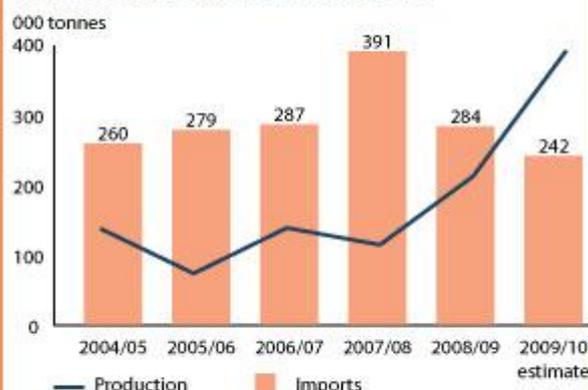
Mongolia Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Wheat	182	388	380	-2
Barley	3	2	3	50
Oats	1	1	0	-100
Others	0	0	0	0
Total	187	392	384	-2

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

Mongolia

Total cereal production and imports

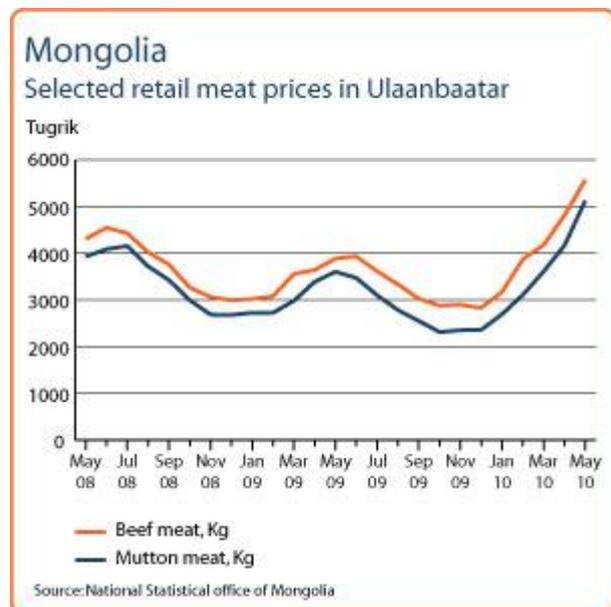
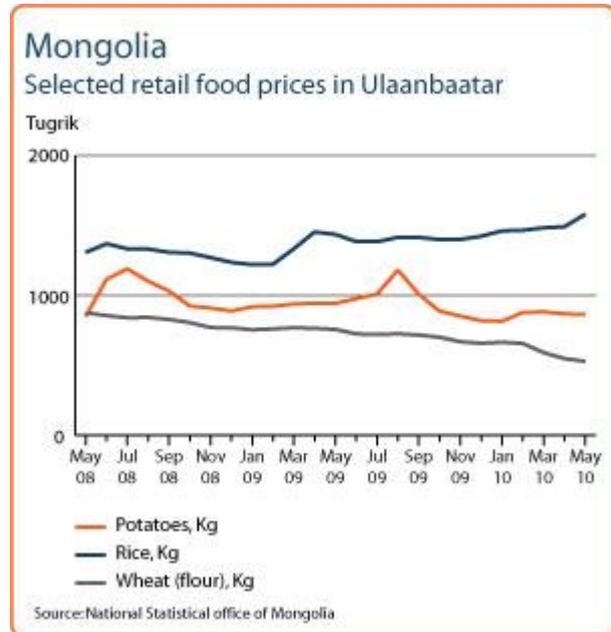


the country was completed in September. The official estimate of 2009 wheat harvest according to the National Statistical Office (NSO) of Mongolia at the end of December 2009 is 388 100 tonnes and total cereal harvest at 391 700 tonnes. This is more than double the drought affected output of 2008. Much of the wheat is produced under irrigation conditions. Hay production for 2009, on the other hand, is estimated by the Ministry of Agriculture at a poor level reducing fodder availability. As a result of the bumper harvest, imports of wheat would be reduced to some 70 000 tonnes in 2010 down from usual over 250 000 tonnes.

According to NSO, between 2005 and 2008 the country experienced a growth in GDP of 30 percent or an annual average rate of about 9 percent, mainly due to the favourable international prices of its export commodities, copper and gold in particular. GDP in 2009, however, is expected to decline due to declining export prices of minerals.

Staple prices came down in 2009 but remain higher than the pre-crisis period

Food security for large numbers of urban poor was significantly affected by the surging food prices in 2008 as the year-on-year inflation in the food subsector as a whole was 80.2 percent in June 2008. Prices of wheat flour, the main food staple in the country, have come down steadily since then but still remain higher than the pre-high food prices crisis period (June 2007). Bread prices, generally subsidised in the capital city Ulaanbaatar, are more stable and below the wheat flour prices, except since March 2010 when wheat flour price dropped. Rice prices on the other hand have remained high at the peak levels of mid-2008 international level and in local currency are at the highest level. Beef and mutton prices in Ulaanbaatar capital city market follow the usual seasonal lows during October-December and highs during May-July. However the increases have been much more marked this year due to exceptional livestock losses following the *Dzud* earlier. This summer prices are likely to remain higher for an extended period. The country's harsh climate and very short growing season make it heavily dependant on imports for many food items.



Reference Date: 05 February 2010

FOOD SECURITY SNAPSHOT

- Extreme cold weather and snow blizzards (*Dzud*) are causing heavy losses of livestock affecting large number of households in rural areas.
- Official estimate puts 2009 wheat harvest at a record level of 388 000 tonnes.
- With bumper crop wheat imports in 2009/10 would be reduced significantly from its usual high levels.

Livestock dependent households suffer serious loss due to *Dzud*

Food security, especially of the rural population, is adversely affected due to the *Dzud* weather conditions. According to the recent FAO rapid needs assessment Mission, the ongoing *Dzud* has killed 1.7 million heads of livestock, causing the estimated economic losses of about USD 62 million and threatening the livelihoods of livestock dependent households. Livestock raising is the dominant agricultural activity and one of country's key economic sectors. The Mission estimated that 21 000 families or about 12 percent of the total herder households have lost more than 50 percent of their animals. There is urgent need of assistance for vulnerable households to prevent further loss of their assets and cash incomes.

Mongolia livestock statistics

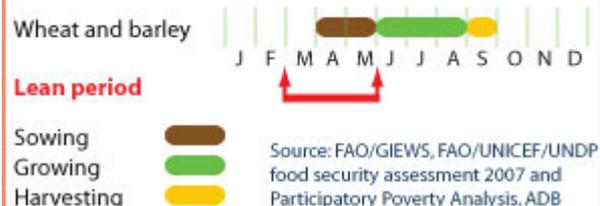
	2007	2008	2009
Number of households with livestock	226116	227547	226649
Number of herdsmen households	171588	171124	170142
Average number of livestock per herdsmen household	235	253	259
Losses of animals due to diseases (in 000)	71.7	109.3	135.1
Total livestock (in 000)	40264	43289	44024
camel (in 000)			277
horse (in 000)			2221
cattle (in 000)			2599
sheep (in 000)			19275
goats (in 000)			19652
Total in terms of cattle units (in 000)			10905

Source: National Statistical Office, Mongolia. Monthly Bulletin of Statistics, Dec. 2009.

Total cereal harvest of 2009 officially estimated at a record level

Harvesting of the 2009 wheat crop, virtually the only cereal produced in the country was completed in September. The official estimate of 2009 wheat harvest according to the National Statistical Office (NSO) of Mongolia at the end of December 2009 is 388 100 tonnes and total cereal harvest at 391 700 tonnes. This is more than double the drought affected output of 2008. Much of the wheat is produced under irrigation conditions. Hay production for 2009, on the other hand, is estimated by

Mongolia Crop calendar

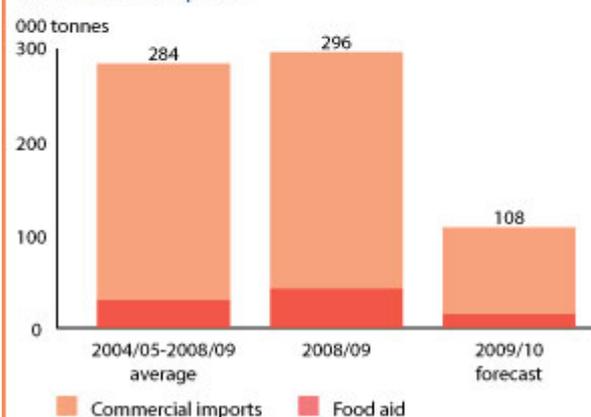


Mongolia Cereal production

	2004-2008 average	2008	2009 forecast	change 2009/2008
	000 tonnes			percent
Wheat	131	210	388	85
Barley	3	2	2	0
Oats	1	1	1	0
Total	136	213	392	84

Note: percentage change calculated from unrounded data.

Total cereal imports



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

Source: FAO/GIEWS Country Cereal Balance Sheets

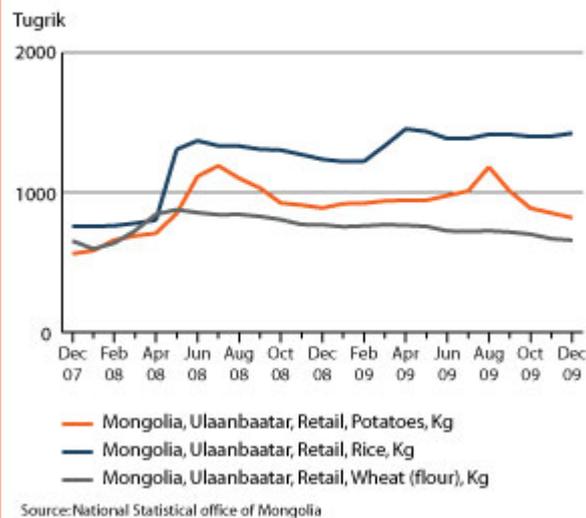
the Ministry of Agriculture at a poor level reducing fodder availability. As a result of the bumper harvest, imports of wheat would be reduced to some 70 000 tonnes in 2010 down from usual over 250 000 tonnes.

According to NSO, between 2005 and 2008 the country experienced a growth in GDP of 30 percent or an annual average rate of about 9 percent, mainly due to the favourable international prices of its export commodities, copper and gold in particular. GDP in 2009, however, is expected to decline due to declining export prices of minerals.

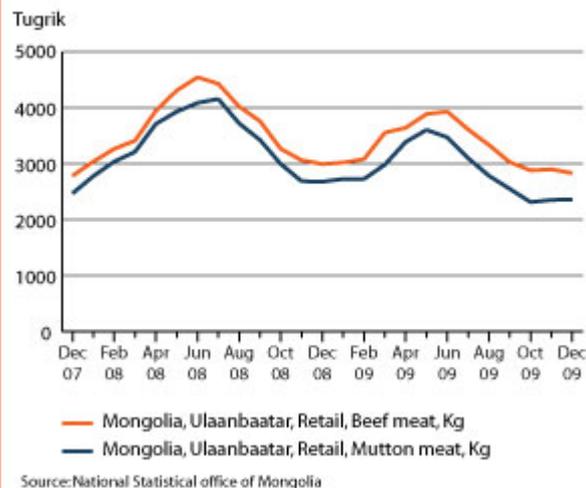
Staple prices have come down in 2009 but remain higher than the pre-crisis period

Food security for large numbers of urban poor was significantly affected by the surging food prices in 2008 as the year-on-year inflation in the food subsector as a whole was 80.2 percent in June 2008. Prices of wheat flour, the main food staple in the country, have come down steadily since then but still remain higher than the pre- high food prices crisis period. Bread prices, generally subsidised in the capital city Ulaanbaatar, are more stable and below the wheat flour prices. Rice prices on the other hand have remained high at the peak levels of mid-2008 international level and in local currency are at the highest level. Beef and mutton prices in Ulaanbaatar capital city market have followed the usual seasonal highs during May-July and lows during October-December. The country's harsh climate and very short growing season make it heavily dependant on imports for many food items.

Mongolia Selected retail food crop prices



Mongolia Selected retail meat prices



Reference Date: 7-January-2010

FOOD SECURITY SNAPSHOT

- 2009 wheat harvest near normal but below record level of 2008.
- Country depends on imports for about two-thirds of its total cereal requirements.
- Overall food security is satisfactory but prices of wheat and rice still remain high.

Total cereal harvest for 2009 forecast well below the record level the year before

Harvesting of the 2009 wheat crop, virtually the only cereal produced in the country was completed in September. The official estimate of 2009 wheat harvest according to the National Statistical Office (NSO) of Mongolia at the end of September is 133 762 tonnes. This is almost equal to the average of the past five years but some 36 percent below the record harvest in 2008. Hay production is also reduced in 2009 compared to the previous year due to the reduced precipitation during the year. Livestock production is the dominant agricultural activity and one of country's key economic sectors. Government statistics also indicates higher losses of adult animals, around 3.6 percent in 2009, similar to 2008 but much higher than in 2007, due to more disease prevalence.

Heavy dependence on imports of cereals

The overall food security in the country is satisfactory. According to NSO, between 2005 and 2008 the country experienced a growth in GDP of 30 percent or an annual average rate of about 9 percent, mainly due to the favourable international prices of its export commodities, copper and gold in particular. GDP in 2009, however, is expected to decline due to declining export prices of minerals.

Staple prices have come down in 2009 but remain higher than the pre-crisis period

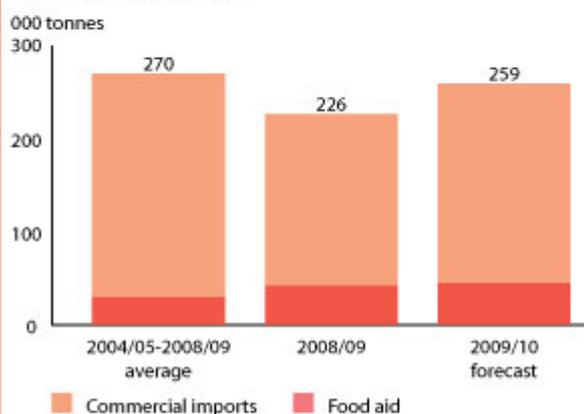
Food security for the urban poor was significantly affected by the surging food prices in 2008 as the year-on-year inflation in the food subsector as a whole was 80.2 percent in June 2008. Prices of wheat flour have come down steadily since then but still remain higher than the pre- high food prices crisis period. Bread prices, generally subsidised in the capital city Ulaanbaatar, are more stable and below the wheat flour prices. Rice prices on the other hand have remained high at the peak levels of mid-2008 international level and in local currency are at the highest level. Beef and mutton prices in Ulaanbaatar capital city market have followed the usual seasonal highs during May-July and lows during October-December. The country's harsh climate and very short growing season make it heavily dependant on imports for many food items.

Mongolia Cereal production

	2004-2008	2008	2009	change
	average		forecast	2009/2008
	000 tonnes			percent
Wheat	131	210	127	-40
Barley	3	2	5	150
Oats	1	1	2	100
Others	0	0	0	0
Total	136	213	134	-37

Note: percentage change calculated from unrounded data.

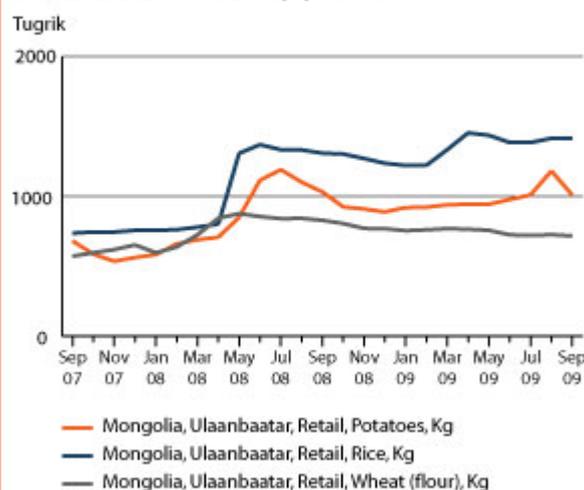
Total cereal imports



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

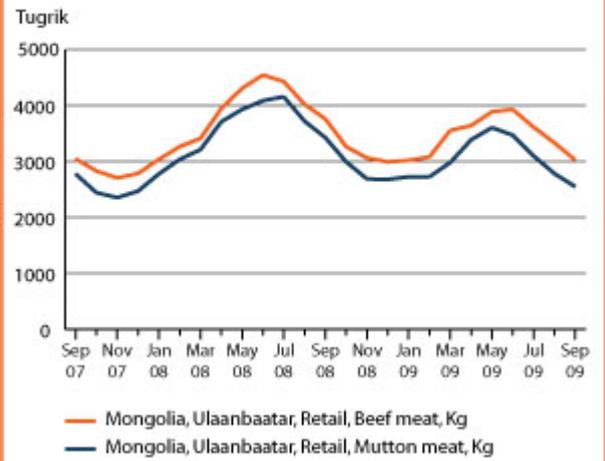
Source: FAO/GIEWS Country Cereal Balance Sheets

Mongolia Selected retail food crop prices



Source: National Statistical office of Mongolia, National Statistical office of Mongolia

Mongolia Selected retail meat prices



Source: National Statistical office of Mongolia