



GIEWS Country Brief Rwanda

Reference Date: 25-October-2022

FOOD SECURITY SNAPSHOT

- Concerns for production of “2023A” season crops despite favourable early season rains
- Aggregate cereal production in 2022 estimated at above-average levels
- Prices of food at high levels due to high production and transportation costs
- Food security situation of poorest households affected by high food and fuel prices

Concerns for production of “2023A” season crops despite favourable early season rains

The September-November “short rainy season” had a timely onset and precipitation amounts received in September were well above average over most cropping areas. The abundant rains had a positive impact on the establishment of “2023A” season crops, to be harvested from December and accounting for about 40 percent of the aggregate cereal output. Although rains in the first half of October were below average over several cropping areas, vegetation conditions remained favourable due to the moisture accumulated early in the season.

According to the latest weather forecast by the Intergovernmental Authority on Development’s (IGADs) Climate Prediction and Application Centre (ICPAC), rains during the remainder of the cropping season are expected to be below average, with a likely negative impact on yields. In addition, yields are likely to be further constrained by a low application of fertilizers due to their high prices. The increasing price trend began in 2021 and was exacerbated since early 2022 by the ripple effects of the war in Ukraine on global supply.

Aggregate cereal production in 2022 estimated at above-average levels

The 2022 aggregate cereal production is estimated at 805 000 tonnes, about 10 percent above the last five-year average, following generally favourable weather conditions during both the 2021 September-November “short rainy season” and the 2022 February-May “long rainy season”. Yields of cassava and cooking bananas, other important staples in the local diet, were also boosted by above-average rainfall amounts and the outputs in 2022 are estimated at about 15 and 20 percent, respectively above the five-year average. By contrast, the aggregate production of beans is estimated at 5 percent below the average, as an erratic temporal distribution of rains during both seasons in

Rwanda

Crop Calendar

(*major foodcrop)



Lean periods

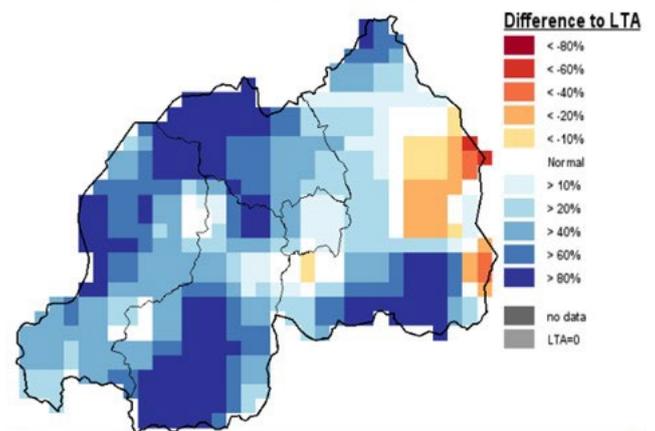
Lean periods

Sowing
Growing
Harvesting

Source: FAO/GIEWS.

Rwanda - Precipitation anomaly

Relative difference to Long Term Average - September 2022



Source: FAO/GIEWS Earth Observation System.

Eastern Province affected yields of pulses, particularly vulnerable to rainfall irregularities.

Food inflation at high levels, underpinned by high production and transportation costs

The annual inflation rate, estimated at a high 17.6 percent in September 2022, has been increasing since early 2022, underpinned by rising food and fuel prices.

The year-on-year food inflation rate was estimated, in September, at 33.2 percent, compared to the 4.5 percent in January. The inflation rate of vegetables, accounting for the largest share of the food basket, was estimated in September at 42.2 percent. Food prices reached high levels, despite adequate market availabilities, due to high production and transportation costs, with prices of agricultural inputs and fuel underpinned by the impact of the war in Ukraine on global supply and international prices.

Food security of poorest households affected by high food prices

Integrated Food Security Phase Classification (IPC) Phase 1 (Minimal) levels of food acute insecurity currently prevail in rural areas and in the capital, Kigali. However, IPC Phase 2 (Stressed) levels of food insecurity prevail among the poorest households, which have a minimally adequate food consumption and are unable to meet some essential non-food needs, due to high food prices.

According to the United Nations High Commissioner for Refugees (UNHCR), as of end-September, the country hosted about 127 000 refugees and asylum seekers, mainly from the Democratic Republic of the Congo and Burundi. Most of them live in camps where they are provided with basic services, cash transfers as well as food and nutrition assistance, with some engaged in informal petty trade and labour activities. Refugees are estimated to face IPC Phase 2! (Stressed!) levels of acute food insecurity, with food assistance averting a worse food insecurity situation. However, high prices of food and fuel are eroding the purchasing power of cash-based humanitarian assistance and constraining the demand for informal labour activities, affecting the income-earning opportunities for refugees.

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Cereal Production

	2017-2021 average	2021	2022 estimate	change 2022/2021
	000 tonnes			percent
Maize	427	483	460	-4.7
Sorghum	163	178	192	7.6
Rice (paddy)	123	132	135	2.5
Others	17	18	18	1.8
Total	730	810	805	-0.7

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.



GIEWS Country Brief Rwanda

Reference Date: 25-May-2021

FOOD SECURITY SNAPSHOT

- Above-average aggregate cereal production expected in 2021
- Prices of cereals and vegetables at low levels
- Food security situation improving following phasing out of some COVID-19-related restrictions

Above-average aggregate cereal production expected in 2021

Harvesting of the “2021B” crops, accounting for about 40 percent of the aggregate cereal output, will commence in June. The February-May “long rainy season” has been characterized by above-average precipitation amounts, which benefited vegetation conditions and boosted yields, and an above-average crop production is expected.

Torrential rains in late April and early May resulted in floods and mudslides in Burera and Gicumbi districts in Northern Province and in Kayonza District in Eastern Province, which affected about 6 500 people and caused damage to infrastructure and localized losses of food stocks and standing crops.

The main “2021A” harvest, contributing to about 60 percent of the aggregate cereal output, was concluded last February and the cereal output is set at a record level. In particular, the production of maize, the main cereal, is officially estimated at about 380 000 tonnes, 15 percent above the average of the previous five years. The high level of production is due to increased plantings, estimated at 293 000 hectares, about 10 percent above the average, and favourable September-November 2020 “short-rains” that boosted yields.

Yields of cassava, potatoes and beans, other important staples in the local diet, were also boosted by abundant and well-distributed “short-rains” and the output of the “2021A” season is estimated at 23, 10 and 8 percent above the average of the previous five years, respectively.

The 2021 aggregate cereal production is tentatively forecast at a record 771 000 tonnes.

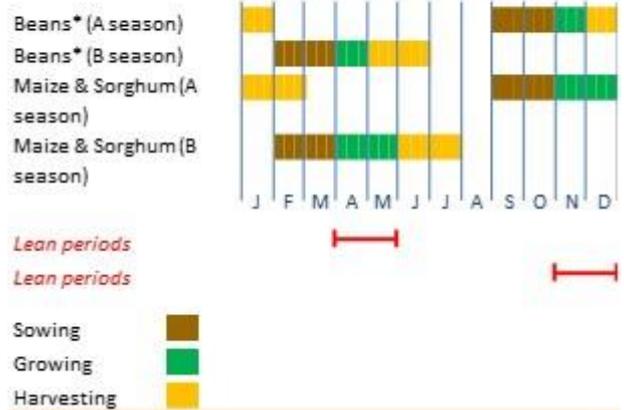
Prices of cereals and vegetables at low levels

In Ruhengeri market, located in Northern Province, prices of maize declined by about 70 percent between December 2020 and April 2021 as the bumper “2021 A” harvest increased market

Rwanda

Crop Calendar

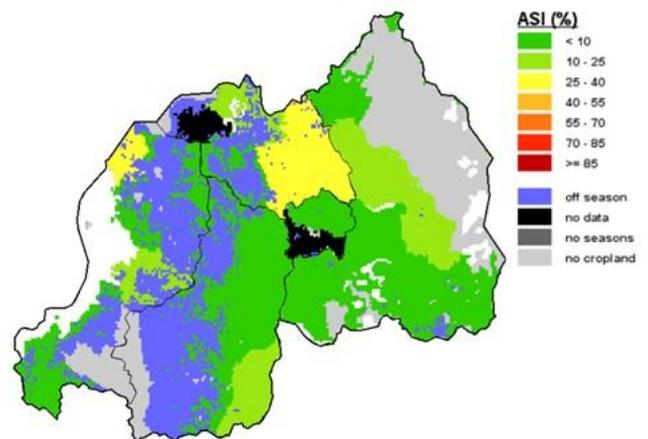
(*major foodcrop)



Source: FAO/GIEWS.

Rwanda - Agricultural Stress Index (ASI)

from start of season 1 to dekad 1, May 2021



Source: FAO/GIEWS Earth Observation System.

supplies. Prices of maize in April were almost 25 percent below their year-earlier levels, due to ample domestic availabilities. Prices of beans declined by 30 percent between December 2020 and March 2021, subsequently increasing by 5 percent in April following seasonal patterns. April prices were around their year-earlier levels. According to the National Institute of Rwanda (NISR), the year-on-year inflation rate was estimated in April at a low 2.4 percent, while food inflation was estimated at just 1.2 percent. The year-on-year inflation rate of bread and cereals was -5.4 percent, while prices of vegetables, accounting for the largest share of the food basket, declined by 3.9 percent over the last 12 months. By contrast, prices of meat increased by 2.9 percent and those of milk, cheese and eggs rose by 1.9 percent over the same period.

Food security situation improving after phasing out of some COVID-19-related restrictions

In late January 2021, the Government decided to re-introduce several restriction measures to curb the COVID-19 pandemic, including a lockdown in the capital, Kigali, and restrictions to inter-district movements.

In April, following a reduction in COVID-19 cases and the start of the vaccination programmes, these measures were phased out. The ensuing increase of the economic activity has benefited income-earning opportunities, especially for the poor urban households engaged in casual labour, petty trade and small business.

IPC Phase 1: “Minimal” levels of food insecurity currently prevail across the country, except in areas of Western Province bordering the Democratic Republic of the Congo, where the poor households engaged in cross-border trade are facing IPC Phase 2: “Stressed” levels of food insecurity as they have lost their main source of income following the COVID-19-related border closures.

According to UNHCR, as of end-April the country hosted about 126 000 refugees and asylum seekers, mainly from the Democratic Republic of the Congo and Burundi. About 90 percent of the refugees live in camps where they are provided with basic services, cash transfers as well as food and nutrition assistance. In March 2021, the World Food Programme (WFP) was forced to reduce its general food assistance by 60 percent due to funding shortfalls and the reduction in assistance, coupled to limited income-earning opportunities due to the economic impact of the COVID-19 pandemic, will likely result in the deterioration of the food security situation of refugees to IPC Phase 3: “Crisis” levels.

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Rwanda

Cereal Production

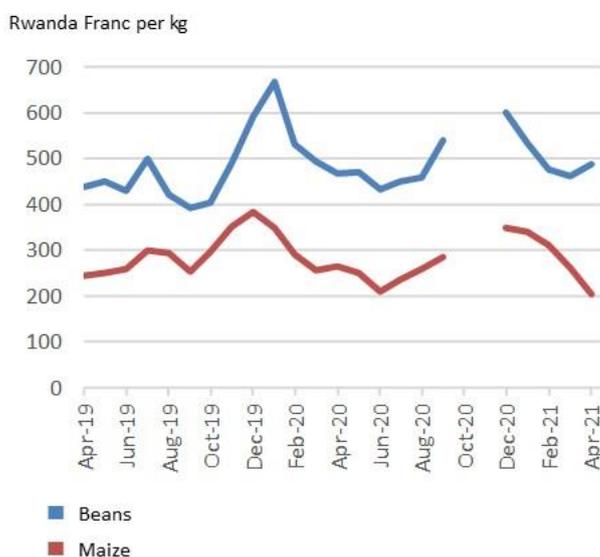
	2016-2020 average	2020	2021 forecast	change 2021/2020
	000 tonnes			percent
Maize	416	451	469	4.0
Sorghum	162	170	166	-2.7
Rice (paddy)	118	117	120	3.0
Others	17	17	17	-0.4
Total	713	754	771	2.2

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Rwanda

Maize and beans prices in Ruhengeri



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



GIEWS Country Brief Rwanda

Reference Date: 27-October-2020

FOOD SECURITY SNAPSHOT

- Erratic rains at start of “2021A” main season affecting vegetation condition in some southern, northern and eastern areas
- Record cereal production obtained in 2020, mainly due to bumper “2020A” main season harvest
- Prices of pulses and vegetables at high levels due to tight supplies
- Economy and food security affected by measures to contain spread of COVID-19 pandemic

Erratic rains at start of “2021A” season affecting vegetation condition in some southern, northern and eastern areas

Planting of the main “2021A” crops, contributing to about 60 percent of the aggregate cereal output, is normally concluded in October. However, the September-November “long rainy season” has been characterized so far by a delayed onset and by an erratic spatial and temporal distribution of precipitation, which delayed planting operations and negatively impacted germination of early planted crops. Currently, according to satellite imagery (see ASI map), between 25 and 85 percent of the cropland is affected by drought in some southern, northern and eastern areas.

According to the latest Greater Horn of Africa Climate Outlook Forum (GHACOF) weather forecast, rains are expected to be below average between October and December, with a likely negative impact on yields.

Record aggregate cereal production obtained in 2020

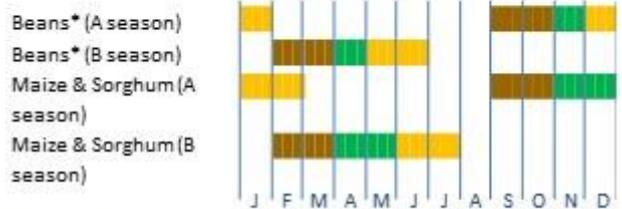
According to official estimates, the 2020 aggregate cereal production is put at a record of 755 000 tonnes, about 11 percent above the average of the previous five years. The record cereal was mainly driven by a bumper “2020A” main season maize and sorghum harvest, due to exceptionally abundant precipitation, which benefited yields. Similarly, the output of cassava was 23 percent above the average of the previous five years.

By contrast, production of potatoes (sweet and Irish potatoes) and beans was affected by excess moisture during the “2020A” season. The output of potatoes was 4 percent down from 2019

Rwanda

Crop Calendar

(*major foodcrop)



Lean periods

Lean periods

Sowing

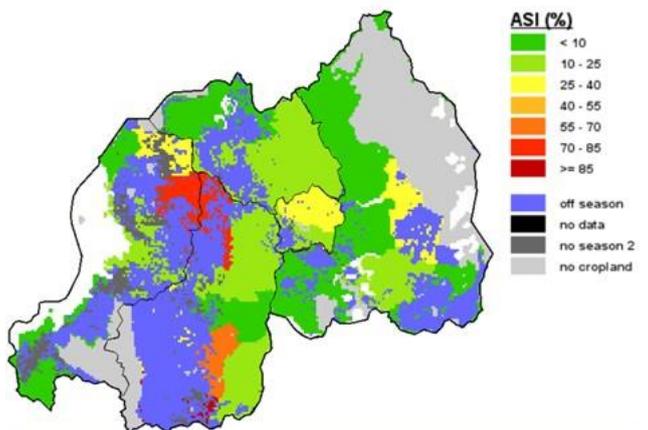
Growing

Harvesting

Source: FAO/GIEWS.

Rwanda - Agricultural Stress Index (ASI)

from start of season 2 to dekad 2, October 2020



Source: FAO/GIEWS Earth Observation System.

but still 7 percent above average, while production of beans was 10 percent lower than the previous year and 5 percent down from the average of the previous five years.

Prices of pulses and vegetables at high levels

In the capital, Kigali, wholesale prices of maize and beans increased by about 30 percent between June and September, with seasonal patterns compounded by trade disruptions following the temporary closure of the two main markets in Kigali City to curb the spread of the COVID-19 pandemic. However, September prices of maize remained around their year-earlier levels due to ample domestic availabilities. By contrast, prices of beans, an important staple in the countries' diet, in September, were about 25 percent higher than their year-earlier levels. The high price levels are due to tight supplies following a reduced 2020 production and to the restrictions implemented to contain the COVID-19 pandemic, which increased the post-harvest losses of perishable products including beans and vegetables. According to the National Institute of Rwanda (NISR), the year-on-year inflation rate was estimated in September at 10.8 percent, while food inflation was estimated at 15.1 percent. While the year-on-year inflation rate of bread and cereals was 4.7 percent, prices of vegetables, accounting for the largest share of the food basket, increased by more than 20 percent over the last 12 months.

Food security situation affected by measures to contain spread of COVID-19 pandemic

The introduction, in March 2020, of several precautionary measures in response to the COVID-19 pandemic, resulted in a marked slowdown of economic activities. According to NISR, in the second quarter of 2020 the Gross Domestic Product declined by 12.4 percent, with the outputs of agriculture, industry and services sectors decreasing by 2, 19 and 16 percent, respectively. Despite a gradual easing of lockdown measures introduced in May, the economic recovery has been modest and several businesses, including private hospitals, schools, hotels and restaurants, are reported to be unable to hire back staff that had been laid off.

Due to the reduction of employment opportunities, below-average incomes and high food prices, IPC Phase 2: "Stressed" levels of food insecurity are prevailing in several areas, particularly in urban centres. Here, the lockdown measures and the economic downturn significantly affected the food security situation of the poor households, which mainly rely on daily wages obtained through casual labour, petty trading, food vending, construction activities and domestic work.

The food security situation in most rural areas is comparatively better. However, in Western and Southern provinces, some poor households engaged in cross-border trade have lost access to this income source due to the COVID-19-related border closures. These households are facing IPC Phase 2: "Stressed" and Phase 3: "Crisis" levels of food insecurity. In these areas, Government social assistance programmes and humanitarian assistance are expected to avert a widespread deterioration of the food security situation.

According to UNHCR, the country hosts about 148 000 refugees and asylum seekers, mainly from the Democratic Republic of the Congo and Burundi. About 90 percent of the refugees live in camps where they are provided with basic services, cash

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Cereal Production

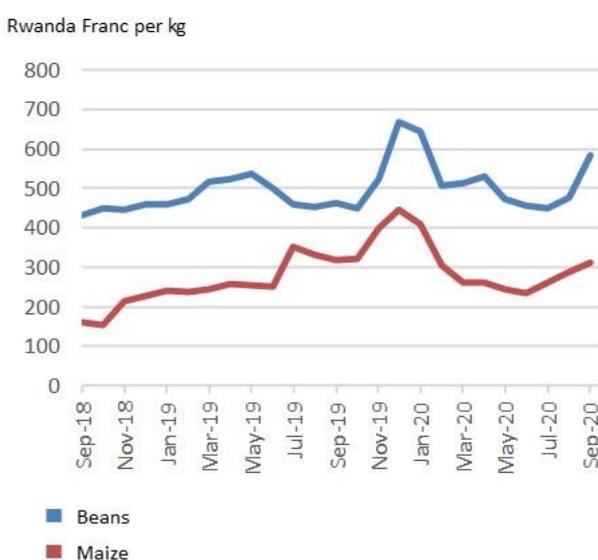
	2015-2019	2019	2020	change
	average		estimate	2020/2019
	000 tonnes			percent
Maize	400	421	451	7.1
Sorghum	154	160	171	7.1
Rice (paddy)	115	132	117	-11.1
Others	14	20	16	-20.0
Total	683	733	755	3.0

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

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Selected food prices in Kigali



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

transfers and food and nutrition assistance. By contrast, the food security situation of about 12 000 Burundian refugees living in urban areas has deteriorated to IPC Phase 2: “Stressed” and Phase 3: “Crisis” levels of food insecurity, as the restrictive measures have affected both incomes and remittances.

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GIEWS Country Brief Rwanda

Reference Date: 19-June-2020

FOOD SECURITY SNAPSHOT

- Poor late season rains affecting yields of “2020B” cereal crops in central areas
- Above-average aggregate cereal production expected in 2020, due to record “2020A” main season harvest
- Prices of maize and beans declined below year-earlier levels in recent months
- Food security situation in urban areas affected by measures to contain spread of COVID-19 pandemic

Poor late season rains affecting yields of “2020B” cereal crops in central areas

Harvesting of the “2020B” crops, accounting for less than 20 percent of the aggregate cereal output, is currently underway and will be concluded in July. The March-May rainy season was characterized by well above-average precipitation in March and April. Subsequently, below-average rains in May affected cereal crops during the flowering phase. The most severe rainfall deficits were recorded over central areas, where vegetation conditions are currently poor (see ASI map) and substantial yield reductions are expected.

Torrential rains in March and April triggered flooding and landslides in several areas, affecting about 11 000 people and resulting in loss of life and damage to infrastructures. However, crop losses, estimated at about 1 000 hectares, have been minimal, amounting to less than 1 percent of the average “B” season area planted.

Planting of the “2020B” season crops in the Eastern Province was affected by the restrictive measures implemented to contain the spread of the COVID 19 outbreak (see Box below) as daily labourers have been unable to travel to some areas due to movement restrictions.

Overall, the “2020B” season cereal production is expected to be slightly below the average of the previous five years.

Above-average aggregate cereal production expected in 2020, due to record “2020A” main season harvest

The main “2020A” harvest, contributing to more than 80 percent of the aggregate cereal output, was concluded last February. The September-December 2019 “short rainy season” was

Rwanda

Crop Calendar

(*major foodcrop)



Lean periods

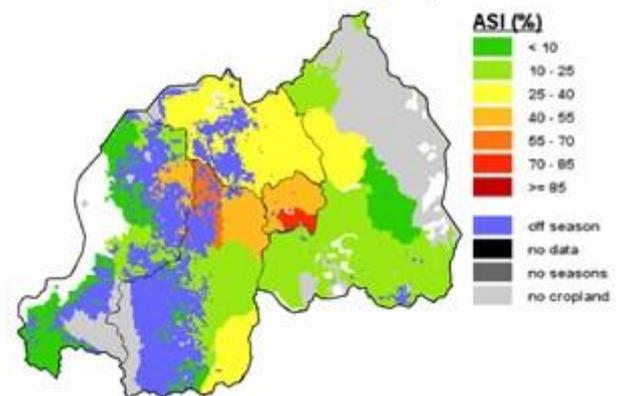
Lean periods

Sowing
Growing
Harvesting

Source: FAO/GIEWS.

Rwanda - Agricultural Stress Index (ASI)

from start of season 1 to Dekad 2, May 2020



Source: FAO/GIEWS Earth Observation System.

characterized by exceptionally abundant precipitation, which benefited yields. In addition, free distributions by the Government and subsidized sales of seeds, fertilizers and other agricultural inputs allowed for an expansion of planted area. As a result, despite some crop losses due to flooding and landslides, the cereal output was estimated at record levels. By contrast, the torrential rains affected the output of beans and potatoes, important staples in the country's diet and particularly vulnerable to excessive moisture.

According to official estimates, the "2020A" season maize production is put at a record 454 500 tonnes, 10 percent above the average of the previous five years. Similarly, the output of cassava was 15 percent above the average of the previous five years. Production of potatoes (sweet and Irish potatoes) and beans, affected by excess moisture, was by 7-10 percent below the "2019A" season output, but still above average.

The 2020 aggregate cereal production is tentatively forecast at about 751 000 tonnes, about 10 percent above the average of the previous five years.

The harvest of the minor "2020C" season crops, mainly tubers and vegetables, will start in September in marshlands and irrigated areas. According to the latest Greater Horn of Africa Climate Outlook Forum (GHACOF) weather forecast, above-average precipitations are expected between June and September, with a favourable impact on yields.

Prices of maize and beans declined below year-earlier levels in recent months

In the capital, Kigali, wholesale prices of beans and maize reached record levels in December 2019 as seasonal patterns were compounded by increased transport costs and trade disruptions caused by torrential rains. Subsequently, prices declined by about 25-30 percent between December 2019 and February 2020 as the commercialization of the "2020" A season harvest increased supplies. Some increases were observed in March and April due to food supply chains and panic buying related to the COVID-19 pandemic, but prices of maize and beans resumed their downward trend in May, when they were about 5 and 10 percent, respectively, below their year-earlier levels. Prices of maize followed similar trends in Ruhengeri market, located in the Northern Province, where they substantially declined between December 2019 and March 2020, increased in April and resumed their downward trend in May, when they were slightly lower than 12 months earlier.

Food security situation in urban areas affected by measures to contain spread of COVID-19 pandemic

The country is generally food secure and the restrictive measures introduced to contain the spread of the COVID-19 outbreak (see Box below) did not have a major impact on employment opportunities and incomes in most rural areas. In the areas affected by floods and landslides, humanitarian assistance provided by the Government is maintaining stable and adequate food security conditions for the vulnerable households. Only some households, which have been severely affected by floods, are facing IPC Phase 2: "Stressed" levels of food insecurity.

In urban areas, the lockdown measures significantly affected the food security situation of the poor households, which mainly rely

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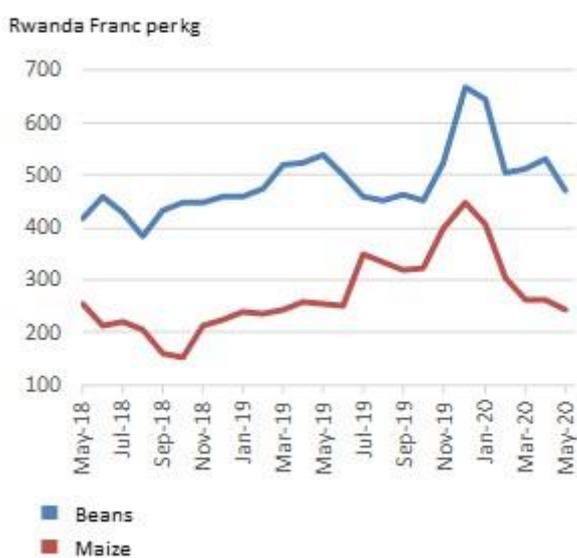
Cereal Production

	2015-2019 average	2019	2020 forecast	change 2020/2019
	000 tonnes			percent
Maize	400	421	437	3.7
Sorghum	154	160	155	-3.1
Rice (paddy)	115	132	140	6.4
Others	16	20	19	-1.5
Total	685	732	751	2.6

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

Rwanda

Selected food prices in Kigali



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

on daily wages obtained through casual labour, petty trading, food vending, construction activities and domestic work. Due to a sharp decline in incomes, IPC Phase 2: “Stressed” levels of food insecurity are prevailing among them. Despite the recent phasing out of some restrictive measures, the economic recovery is likely to be slow and the food security situation of the urban poor is expected to remain at IPC Phase 2: “Stressed” level at least until July/August.

According to the UNHCR, as of end-May 2020, the country hosted about 149 000 refugees and asylum seekers, 73 000 from the Democratic Republic of the Congo and 76 000 from Burundi. About 90 percent of the refugees live in camps, where they are provided with basic services, cash transfers and food and nutrition assistance, keeping their food security situation stable at IPC Phase 1: “Minimal” levels. By contrast, the food security situation of about 11 500 refugees living in Kigali City has deteriorated to IPC Phase 2: “Stressed” levels, as they do not receive humanitarian assistance and the restrictive measures have affected both incomes and remittances.

COVID-19 and measures adopted by the Government

In March and April 2020, the Government introduced several precautionary measures in response to the COVID-19 pandemic, including:

- The suspension of travel between cities and districts.
- The obligation for all citizens to stay indoors, unless movement is essential.
- Work-at-home orders for all employees, except for those providing essential services.
- The obligation to wear face masks in public and in multi-family compounds.
- The suspension of all international flights, except for cargo and emergency flights.
- The closure of all land borders, except for returning Rwandan nationals and legal residents, and cargo trucks.
- The introduction, in cooperation with Kenya, Uganda and South Sudan, of a digital surveillance and tracking system to monitor cargo truck drivers engaged in cross-border transport activities.
- The obligation for restaurants and cafes to provide only take-away and delivery services.
- The obligation for bars to close at 21:00 hours in Kigali and other cities, and at 19:00 hours in rural areas.
- The closure of all shops and markets selling non-essential items.
- The closure of all schools, universities and places of worship.
- The prohibition of concerts, exhibitions, festivals, open-days, marching events and other unnecessary gatherings.

To mitigate the economic impact of these measures, especially on the vulnerable households, the Government introduced:

- The distribution of food aid to 20 000 beneficiaries in the capital, Kigali.
- Fixed prices for 17 food items, including rice, sugar and cooking oil.

Beginning from May 2020, some restrictive measures have been phased out. For example, public administration services and private businesses have been allowed to resume their activities, abiding to strict health and safety measures.

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GIEWS Country Brief Rwanda

Reference Date: 16-January-2020

FOOD SECURITY SNAPSHOT

- Above-average “2020A” season cereal production expected due to abundant precipitation
- Torrential rains triggered floods and landslides in some northern and western areas in December, damaging local livelihoods
- Above-average aggregate cereal production obtained in 2019 due to favourable weather conditions
- Prices of maize were very high in November, mainly due to reduced imports from Uganda following the closure of border custom posts
- Food security conditions are generally favourable

Above-average “2020A” season cereal production expected due to abundant rains

The “2020A” season harvest is underway and will be concluded in February. The September-December 2019 “short rainy season” was characterized by exceptionally abundant precipitation, with cumulative seasonal rains estimated at 50-100 percent above the long-term average over most cropping areas. The heavy precipitation had a positive impact on crop establishment and development, illustrated by good vegetation conditions (see ASI map). The favourable growing conditions, coupled with free distributions by the Government and subsidized sales of seeds, fertilizers and other agricultural inputs, benefited planted area and yields, and an above-average harvest is expected. However, torrential rains in December triggered flooding in lowlands and landslides in Musanze District in the North Province and Ngororero District in the West Province, with crop losses and damage to infrastructure. The heavy seasonal rains are likely to result in localized production shortfalls of beans and Irish potatoes, particularly vulnerable to excessive moisture, especially in the North Province.

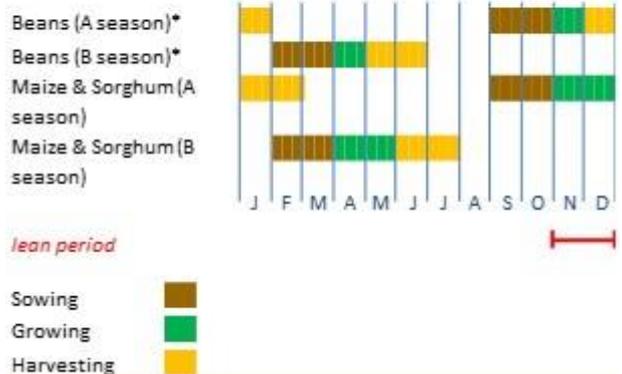
Above-average aggregate cereal production obtained in 2019 due to favourable weather conditions

Both the September-December 2018 “short rainy season” and the February-May 2019 “long rainy season” were characterized by a delayed onset of rains followed by abundant mid and late season precipitation, which brought cumulative seasonal amounts to above-average levels and boosted yields. As a result, both the “2019A” and “2019B” harvests, concluded in February and July, respectively, were estimated at above-average levels, despite some localized pulse and tuber losses due to excessive

Rwanda

Crop Calendar

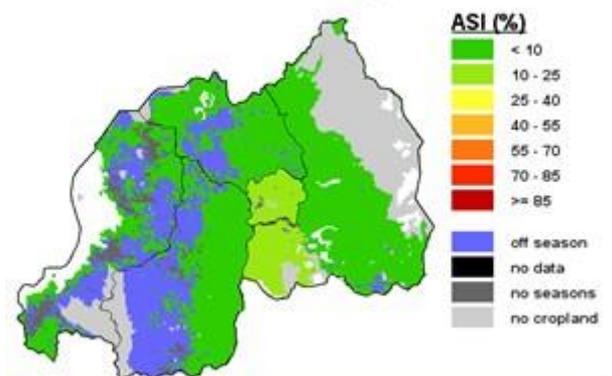
(*major foodcrop)



Source: FAO/GIEWS.

Rwanda - Agricultural Stress Index (ASI)

from start of Season 2 to dekad 3, December 2019



Source: FAO/GIEWS Earth Observation System.

moisture. Similarly, the minor “2019C” season harvest, gathered in September in marshlands and irrigated areas, was above average, as abundant rains in June had recharged water sources and rainfall in July and August was adequate.

According to official estimates, the 2019 aggregate cereal production is put at about 733 000 tonnes, about 3 percent up from 2018 and 12 percent above the average of the previous five years.

Prices of maize at very high levels in November mainly due to reduced imports

In the capital, Kigali, wholesale prices of maize increased in November by about 25 percent, with seasonal patterns compounded by increased transport costs and trade disruptions caused by torrential rains. Despite adequate domestic availabilities, prices in November were about 85 percent higher than one year earlier, mainly due to reduced imports from Uganda following the closure of border custom posts in February 2019. Prices of beans increased by about 15 percent in November, when they were about 20 percent higher than in the same month of the previous year.

Food security conditions are generally favourable

The country is generally food secure. Food availability has improved since last December, when the “2020A” season crops started to be available for local consumption, ending the lean season. In the areas affected by floods and landslides, humanitarian assistance provided by the Government in the framework of district social safety net programmes is maintaining stable food security conditions for vulnerable households.

According to the UNHCR, as of end-2019, the country hosted nearly 150 000 refugees and asylum seekers. About 76 000 of them are from the Democratic Republic of the Congo while about 73 000 are Burundians living in the Mahama Camp in the Kirehe District. Under the framework of an inter-agency multi-sector response, led by the Government’s Ministry in charge of Emergency Management (MINEMA), refugees are provided with basic services, cash transfers and food and nutrition assistance. Refugees are also increasingly integrated in the national economic and social systems as they are allowed and encouraged to seek for labour opportunities to support market food purchases. Overall, their current food security situation is generally satisfactory.

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Rwanda

Cereal Production

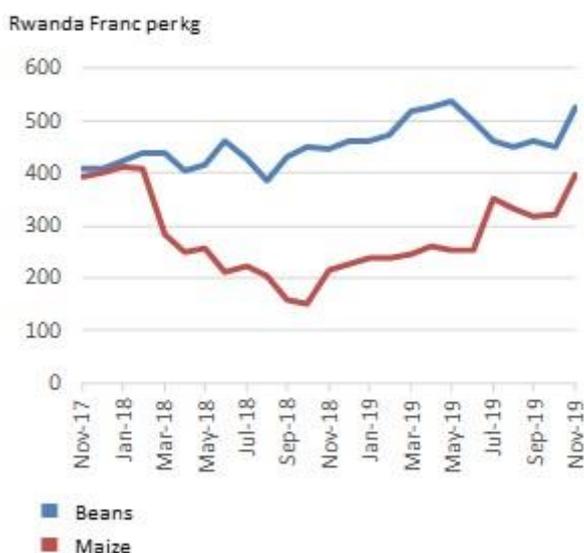
	2014-2018 average	2018	2019 estimate	change 2019/2018
	000 tonnes			percent
Maize	387	424	418	-1.6
Sorghum	150	155	163	5.3
Rice (paddy)	103	114	132	16.2
Others	14	17	20	12.7
Total	655	710	733	3.2

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Rwanda

Selected food prices in Kigali



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



GIEWS Country Brief Rwanda

Reference Date: 06-August-2019

FOOD SECURITY SNAPSHOT

- Favourable outcome of the “2019B” season due to abundant mid and late season rains
- Above-average aggregate cereal production expected in 2019
- Prices of maize firm at high levels in June due to reduced imports from Uganda following the closure of border custom posts
- Favourable food security situation, including for the 150 000 refugees from Burundi and the Democratic Republic of the Congo

Favourable outcome of the “2019B” season due to abundant mid and late season rains

Harvesting of the “2019B” crops, accounting for almost 20 percent of the aggregated cereal output, has been recently concluded. The February-May rainy season was characterized by a significantly delayed onset, with precipitations fully establishing only in the second half of March. However, rains in April and May were well above the average, offsetting moisture deficits, improving vegetation conditions and lifting crop prospects. Rains atypically continued into mid-June, allowing late planted crops to fully mature. As a result, aggregated crop production is expected to be at above-average levels, driven by ample harvests of maize, cassava, sweet potatoes and banana. However, the output of beans and Irish potatoes (particularly vulnerable to excessive moisture) is expected to be at average levels due to localized losses following the heavy late season downpours.

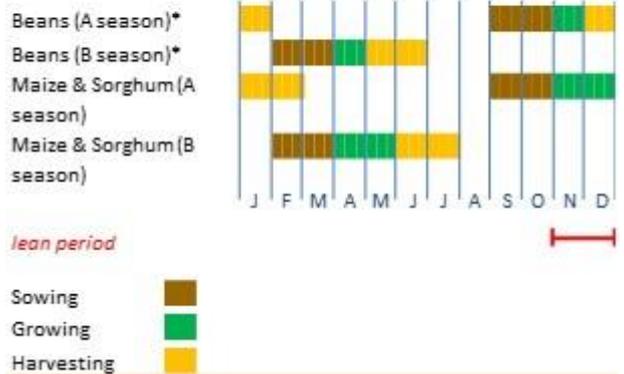
Above-average aggregate cereal production expected in 2019

The main “2019A” harvest, contributing to more than 80 percent of the aggregated cereal output, was concluded in February. The September-December 2018 rainy season was characterized by early-season dryness, especially in the Eastern and Southern provinces, and planting, normally completed in October, was delayed by about three weeks. The rainy season fully established in mid-October, but rainfall amounts remained below average until mid-November. Subsequently, the above-average rains until late December offset the moisture deficits and brought cumulative seasonal amounts to above-average levels, substantially improving vegetation conditions and benefiting yields.

Rwanda

Crop Calendar

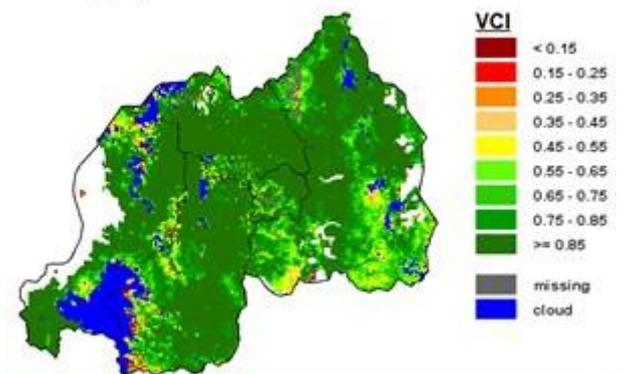
(*major foodcrop)



Source: FAO/GIEWS.

Rwanda - Vegetation Condition Index (VCI)

Dekad 2, July 2019



Source: FAO/GIEWS Earth Observation System.

According to official estimates, the “2019A” season cereal production is put at 438 000 tonnes, 10 percent above the average of the previous five years. Similarly, production of roots and tubers (mainly cassava and potato), cooking bananas and beans, important staples in the country’s diet, was respectively 20, 15 and 5 percent above average.

The 2019 aggregate cereal production is tentatively forecast at about 694 000 tonnes, 2 percent below the bumper 2018 output, but 6 percent above the average of the previous five years.

The minor “2018C” season harvest, mainly consisting of tubers and vegetables, will be gathered in September in marshlands and irrigated areas. Crop production is expected at above-average levels as abundant rains in June have recharged water sources and rainfall is forecast at above-average levels.

Prices of maize firm at high levels in June due to reduced imports

In the capital, Kigali, wholesale prices of maize remained firm in June despite the ongoing “2019B” harvest and they were about 20 percent higher than one year earlier. The high price levels, in spite of adequate carryover stocks from the above-average “2019A” harvest and the favourable prospects for the “2019B” crops, were due to reduced imports from Uganda following the closure of border custom posts. Similarly, prices of beans declined by about 5 percent in June, but remained about 10 percent higher than in the same month of the previous year.

Food security conditions are generally good including for refugees

The country is generally food secure. Food availability has improved since May, when the “2019B” season crops started to be available for local consumption, ending the lean season.

According to the UNHCR, as of May 2019, the country hosts about 150 000 refugees and asylum seekers. Nearly 78 000 of them are from the Democratic Republic of the Congo, while about 72 000 are Burundians living in the Mahama Camp in Kirehe District. Under the framework of an interagency multi-sector response led by the Government’s Ministry in charge of Emergency Management (MINEMA), refugees are provided with basic services and food and nutrition assistance. In addition, they are increasingly integrated in national economic and social systems as they are allowed and encouraged to seek for labour opportunities to support market food purchases. As a result, their current food security situation is generally satisfactory.

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Rwanda

Cereal Production

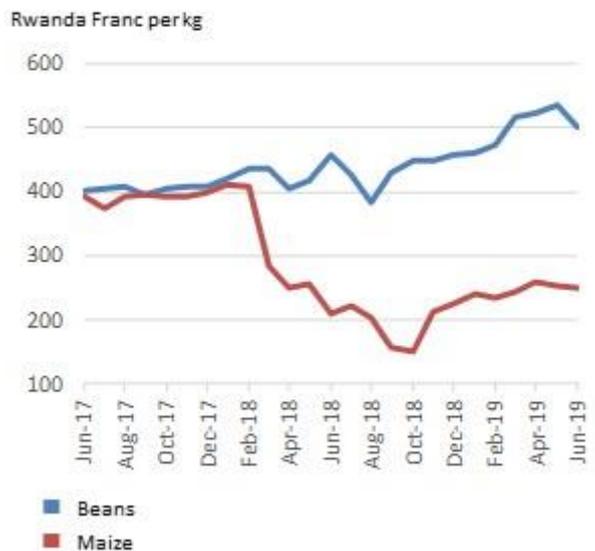
	2014-2018 average	2018	2019 forecast	change 2019/2018
	000 tonnes			percent
Maize	387	424	411	-3.1
Sorghum	150	155	149	-3.7
Rice (paddy)	103	114	117	+2.6
Others	14	17	17	-2.7
Total	655	710	694	-2.3

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Rwanda

Selected food prices in Kigali



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



GIEWS Country Brief Rwanda

Reference Date: 27-June-2018

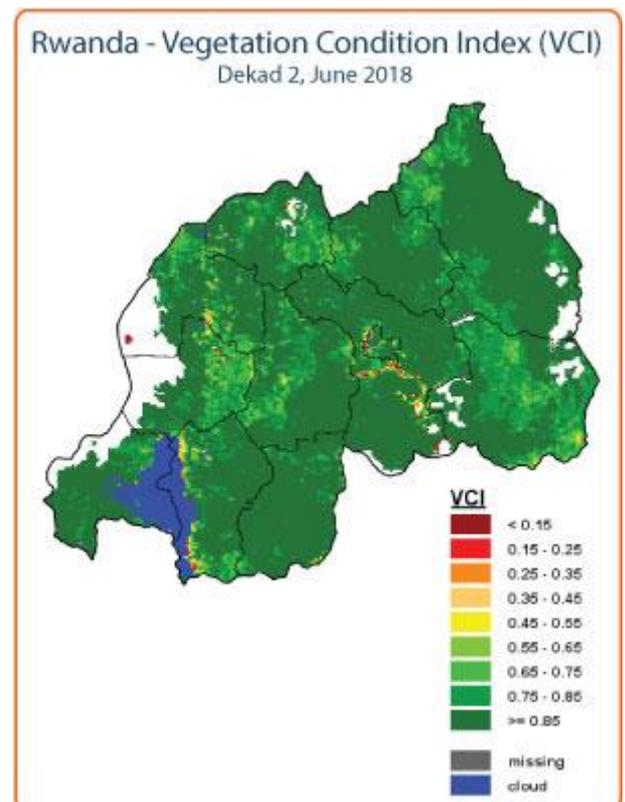
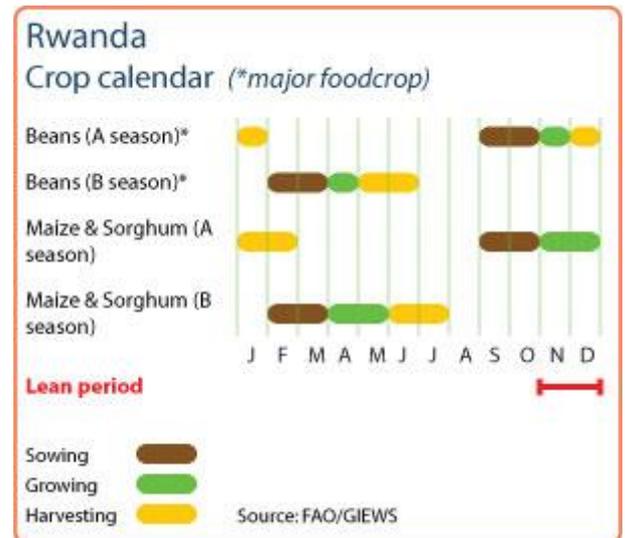
FOOD SECURITY SNAPSHOT

- Significant production losses for pulse and rice crops in 2018B season due to excess moisture and floods
- About 50 000 people displaced in April and May due to widespread floods
- Average 2018A season harvest, with localized production shortfalls in eastern areas due to below-average rainfall
- Prices of maize declining to low levels in recent months, prices of beans unseasonably increasing in May
- Generally good food security situation, with pockets of food insecurity in some eastern districts
- Significant number of refugees from Burundi and Democratic Republic of the Congo in need of humanitarian assistance

Significant production losses for pulse and rice crops in 2018B season due to excess moisture and floods

Harvesting of the 2018B main season cereal crops is currently underway, while harvesting of beans is almost complete. The February-to-May “long-rains” season was characterized by below average precipitation in February and near average rains in March, followed by exceptionally high rainfall amounts in April and May (more than twice the long-term average). The heavy rains had a positive impact on vegetation conditions and lifted overall crop prospects, but also caused landslides and triggered widespread flooding. The floods caused damages to houses, infrastructures and farmland, and displaced about 50 000 people, with the most affected areas being located in Nyabihu and Rubavu districts in Western Province, Rulindo district in Northern Province, Gasabo District in Kigali Province and Gatsibo and Kirehe districts in Eastern Province. The abundant seasonal rains were beneficial to maize, sweet potatoes, bananas and cassava crops, while they resulted in a reduced output of beans, which are the main crop grown during the B season and are particularly vulnerable to excessive moisture, and in rice crop losses in some marshland areas. Overall, the aggregate 2018 B season crop production is expected at near average levels.

Earlier in the year, the harvest of 2018A season crops was concluded in February and crop production is estimated at average levels, as the September-December 2017 “short-rains”



rainy season was characterized by adequate rainfall amounts and a favourable distribution over most cropping areas. By contrast, in parts of Nyagatare, Kayanza and Kirehe districts in Eastern Province, erratic rains resulted in localized production shortfalls.

Accordingly, the overall cereal production in 2018 (including an average output of the minor 2018C season crops, to be harvested in September in marshlands and irrigated areas) is tentatively forecast at about 740 000 tonnes, slightly above the output obtained in 2017, but still below the average of the previous five years.

Prices of maize declining to low levels in recent months

In the capital, Kigali, wholesale prices of maize declined by almost 40 percent between January and April 2018 as newly harvested crops from the 2018A harvest increased supplies. Prices slightly increased following seasonal patterns in May, when they were more than 30 percent lower than the high levels of one year earlier. Prices of beans, after having declined by 7 percent in April, increased by 3 percent in May despite the start of the harvest, supported by concerns over 2018B season production shortfalls due to excess moisture. Prices of beans in May were about 10 percent higher than in the same month of the previous year.

Food security conditions generally good, except in some eastern areas and for refugees

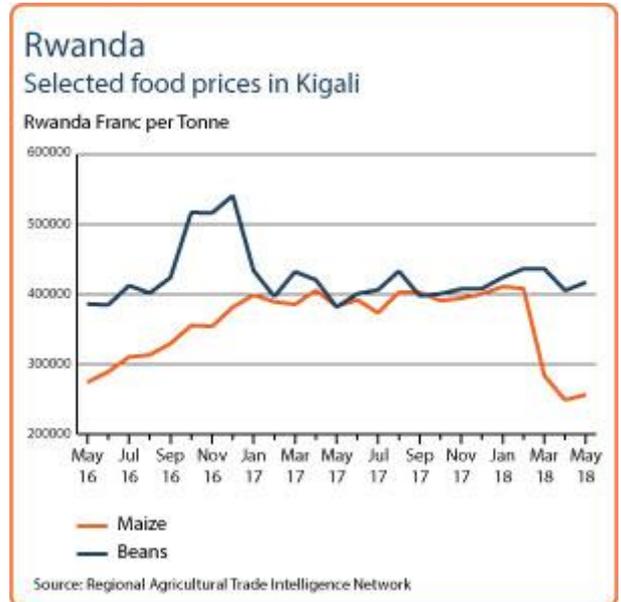
The country is generally food secure. Food availability has improved since May, when 2018B season crops started to be available for local consumption, ending the lean season. The recent floods are expected to not have a significant impact on the acute food insecurity levels as the Ministry of Disaster Management and Refugees (MIDIMAR) is providing the affected populations with food assistance, building material and income-generating opportunities through infrastructure rehabilitation projects. However, food security is deteriorating to IPC Phase 2: "Stressed" food insecurity levels for some poor households in the worst affected areas and in parts of Eastern Province where the impact on livelihoods of the recent floods has compounded the 2018A season crop production shortfalls.

According to UNHCR, as of May 2018, the country hosts about 154 000 refugees and asylum seekers. About 75 000 of them are from the Democratic Republic of the Congo, while nearly 70 000 are Burundians living in Mahama Camp in Kirehe District. The food security of the refugees is essentially guaranteed by the provision of continued humanitarian assistance. Food assistance operations are constrained by funding gaps and to help ameliorate the food security situation of the refugees, the Government has modified the mobility rules to allow them to seek for labour opportunities to support market food purchases. However, with several fields flooded around Mahama Camp in Kirehe District, income earning sources have temporarily declined for Burundian refugees.

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Rwanda				
Cereal production				
	2013-2017 average	2017	2018 forecast	change 2018/2017
	000 tonnes			percent
Maize	473	370	400	8
Sorghum	148	145	145	0
Rice (paddy)	101	120	115	-4
Others	81	84	80	-5
Total	803	719	740	3

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





GIEWS Country Brief Rwanda

Reference Date: 28-March-2018

FOOD SECURITY SNAPSHOT

- Abundant rains in March offset moisture deficits and lift production prospects of 2018B season crops
- Average 2018A season harvest, with localized production shortfalls in eastern areas due to below-average rainfall
- Maize prices stable in recent months around their year-earlier levels
- Generally good food security situation, with pockets of food insecurity in some eastern districts
- Significant number of refugees from Burundi and Democratic Republic of the Congo in need of humanitarian assistance

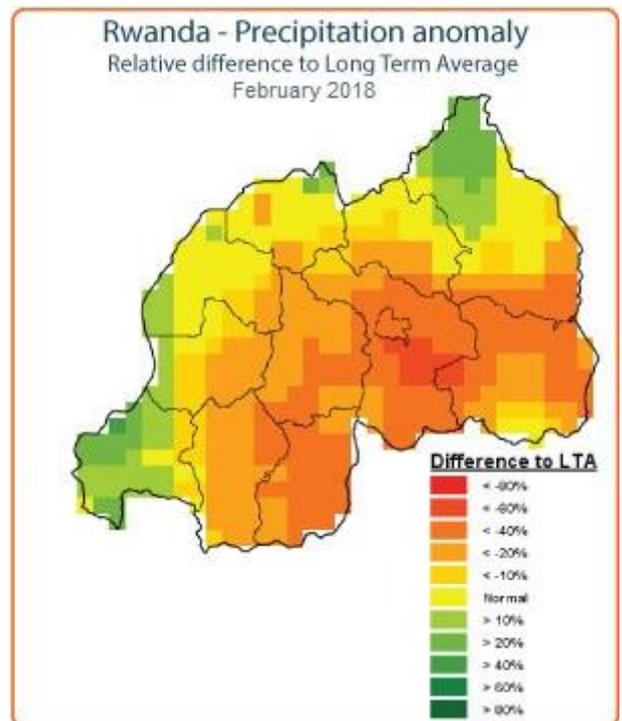
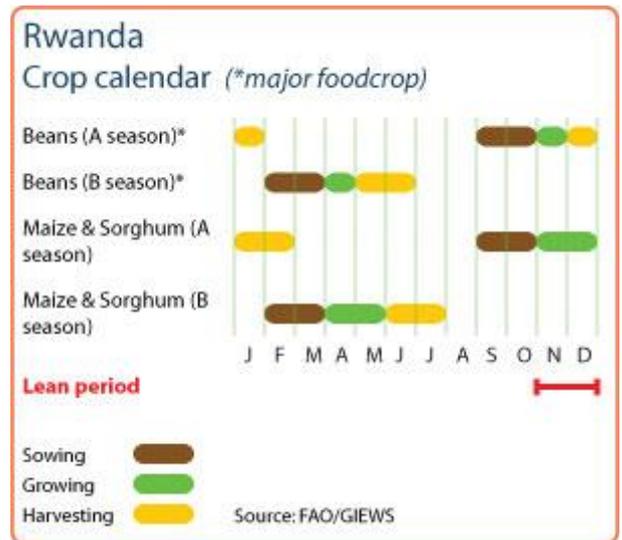
Heavy rains in March lifted prospects for 2018B season crops

Planting of the 2018B season crops, to be harvested from May, is almost complete. According to remote sensing information, rains had a timely onset in early February, but the monthly cumulative rainfall was 20-60 percent below the long-term average over most cropping areas. Most severe deficits were observed in central and eastern districts, where they had a negative impact particularly on the establishment of the early-planted crops. Abundant rainfall in the first and second dekads of March offset moisture deficits, improving vegetation conditions and lifting crop prospects.

According to the latest Greater Horn of Africa Climate Outlook Forum weather forecast, the March-May rains are likely to be average to above average, with a positive impact on crop yields. In particular, rainfall amounts and distribution in the coming weeks will be crucial for crop performance and a close monitoring is warranted.

Average output for 2018A season crops

Harvesting of the 2018A season crops was concluded in February. Crop production is expected at average levels as the September-December 2017 "short-rains" rainy season was characterized by adequate rainfall amounts and a favourable distribution over most cropping areas. By contrast, in parts of Nyagatare, Kayonza and Kirehe districts in Eastern Province, erratic rains resulted in localized production shortfalls.



Maize prices stable in recent months

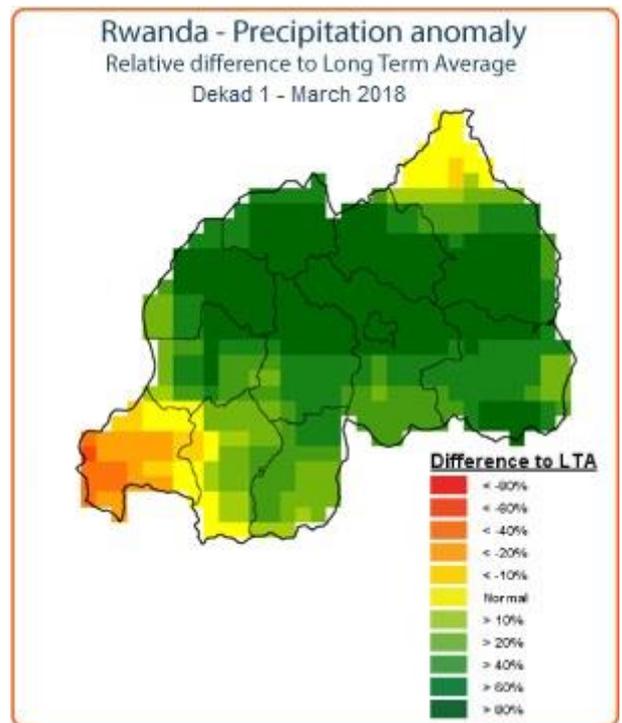
In the capital, Kigali, wholesale prices of maize were mostly stable in recent months, around their year-earlier levels. By contrast, prices of beans increased by 6 percent between December 2017 and February 2018, when they were 10 percent higher than in the same month of the previous year.

Food security conditions are generally good, except in some eastern areas and for refugees

The country is generally food secure. Food availability has improved since last December when the 2018A season crops started to be available for local consumption, ending the main lean season. Agricultural activities related to the cultivation of 2018B season crops are providing labour opportunities for the poor households, improving their purchasing power and access to food. However, food security is deteriorating in Nyagatare, Kayonza and Kirehe districts of Eastern Province, where households are facing IPC Phase 2: “Stressed” food insecurity levels as stocks have been depleted earlier than usual following the below-average 2018A production. In response, the Government conducted food assistance distributions to assist the vulnerable households.

According to UNHCR, as of January 2018, the country hosts about 174 000 refugees and asylum seekers. About 75 000 of them are from the Democratic Republic of the Congo, while nearly 90 000 are Burundians living in Mahama Camp in Kirehe District. The food security of the refugees is essentially guaranteed by the provision of continued humanitarian assistance. However, food assistance operations are constrained by funding gaps and, to help ameliorate the food security situation of the refugees, the Government has modified the mobility rules to allow them to seek for labour opportunities to support market food purchases. The Government is also in the process of integrating the refugees in its national safety net programme, including high-intensity labour programmes.

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Rwanda

Cereal production

	2012-2016	2016	2017	change
	average			
000 tonnes				
Maize	514	374	370	-1
Sorghum	147	164	145	-12
Rice (paddy)	92	111	130	17
Others	80	88	84	-5
Total	832	737	729	-1

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

Rwanda

Selected food prices in Kigali

Rwanda Franc per Tonne



Source: Regional Agricultural Trade Intelligence Network



GIEWS Country Brief Rwanda

Reference Date: 27-April-2017

FOOD SECURITY SNAPSHOT

- Below-average precipitations at beginning of 2017B agricultural season
- Harvest of 2017A season affected in parts by below-average rainfall
- Maize prices at high levels due to tight national and regional supplies
- Generally good food security situation, with pockets of food insecurity in some eastern and southern districts
- Significant number of refugees from Burundi in need of humanitarian assistance

Below-average rains at beginning of 2017B season affecting crop establishment

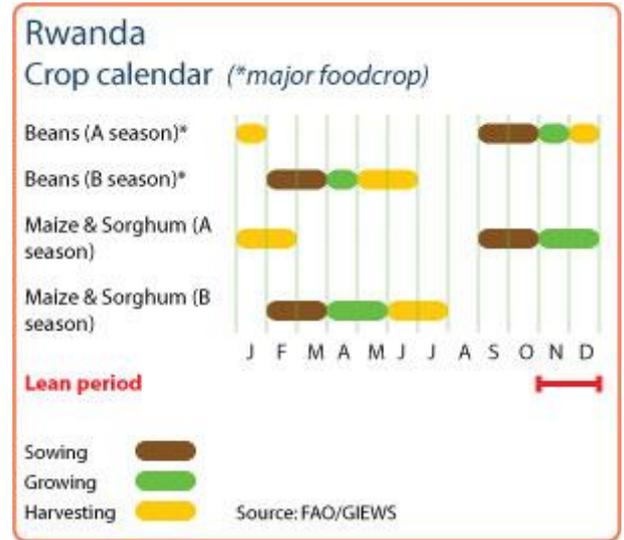
Planting of the 2017B season crops, to be harvested from May, was completed in March. Late and below-average rainfall so far had a negative impact on crop establishment and vegetation conditions. According to remote sensing analysis and information, rains had a timely onset in February, but the accumulated rainfall between February and the first dekad of April was about 20-30 percent below the long-term average over most cropping areas, with the most severe deficits observed in southeastern and northeastern districts. Rainfall amounts and distribution in the coming weeks will be crucial for crop performance and a close monitoring is warranted.

Armyworm infestations affecting early-planted crops have been reported in several cropping areas. The Rwanda Agriculture Board has estimated the affected area at about 15 700 hectares, which represents about 25 percent of the total area planted with maize and sorghum. Local authorities are undertaking appropriate control measures.

According to the latest Greater Horn of Africa Climate Outlook Forum weather forecast, the March-May rains are likely to be average to above-average, which will ease the moisture deficits accumulated so far and improve vegetation conditions.

Harvest of 2017A season affected in parts by below-average rainfall

Harvesting of the 2017A season crops was concluded in February. The October-January "short-rains" season was characterized by an early onset in mid-September and near-



Rwanda
Cereal production

	2011-2015 average	2015	2016 estimate	change 2016/2015
	000 tonnes			percent
Maize	559	550	550	0
Sorghum	148	145	145	0
Rice (paddy)	86	97	111	14
Others	83	74	74	0
Total	876	866	880	2

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

normal rainfall amounts in October and November. However, the early cessation of the rains in mid-December affected the yields of late-planted crops. In addition, seasonal cumulative rainfall in western highlands bordering Lake Kivu and in eastern semi-arid agro-pastoral areas was up to 25 percent below the long-term average, resulting in a reduced output.

Maize prices at high levels

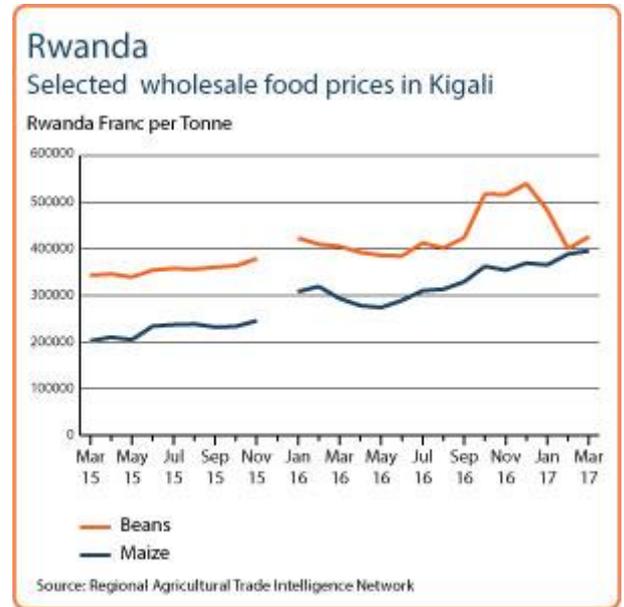
In the capital, Kigali, despite the ongoing 2017A season harvest, wholesale prices of maize increased by 8 percent between January and March 2017 when it was traded at about RWF 400/kg, 35 percent more than 12 months earlier. The increase is mainly due to localized production shortfalls and reduced and highly-priced exports from neighbouring Uganda and the United Republic of Tanzania, where the supply situation is tight, which prevented an adequate replenishment of stocks. Sharper price increases were recorded in eastern areas where a below-average output was gathered. In Kirehe district, prices of maize increased by 12 percent over the same period. Prices of beans, after having declined by 17 percent in February, increased by 6 percent in March, when they were around their year-earlier levels.

Food security conditions generally good

Food security conditions have improved since last December when the 2017A season crops started to be available for local consumption, ending the main lean season. Agricultural activities related to the cultivation of 2017B season crops are providing labour opportunities for poor households, improving their purchasing power and access to food. However, food security is deteriorating in some eastern and southern districts (Kayonza, Kirehe, Ngoma, and Bugesera), where households are facing IPC Phase 2: “Stressed” food insecurity levels as stocks have been depleted earlier than usual following the below-average 2017A production and households rely more on markets to meet their food requirements. In response, the Government conducted food assistance distributions (mainly maize and beans) in these areas to assist vulnerable households.

According to UNHCR, as of end-March, about 85 000 refugees from Burundi are hosted in Mahama (Kirehe district in the East) and Kigali camps, and their food security is essentially guaranteed by continued humanitarian assistance.

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GIEWS Country Brief Rwanda

Reference Date: 22-November-2016

FOOD SECURITY SNAPSHOT

- Favourable start of 2017A cropping season
- Food prices on the rise
- Acute food insecurity persists in some eastern districts
- Significant number of refugees from Burundi in need of humanitarian assistance

Favourable start of 2017A agricultural season

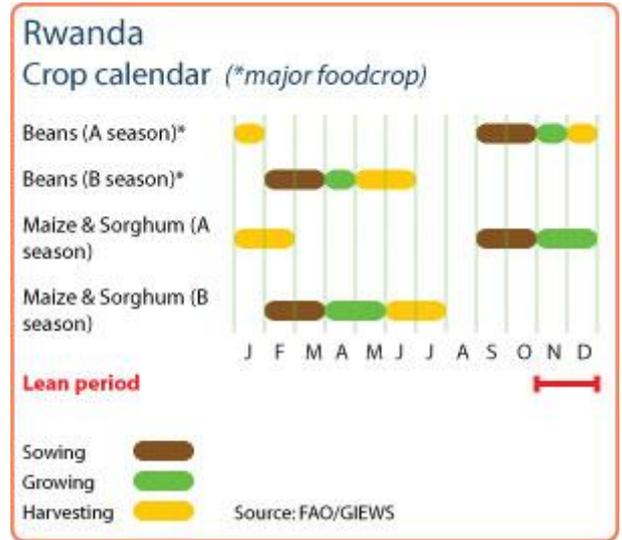
Planting of the 2017A has been completed at the end of October. After a timely onset at the end of September, seasonal rains have been erratic during the first two dekads of October, but they resumed by the end of the month, benefitting crop development in most agricultural areas. The 2017A season early forecast for crop production is at average levels as rainfall amounts for the remainder of the season are expected to be good, especially in western and central cropping areas. Lower production levels are likely in eastern and southern drought-prone areas, where rains might be less favourable.

Food prices on the increase

According to the National Statistics Institute of Rwanda, the Consumer Price Index (CPI) increased by about 3 percent between September and October 2016, when it was 9 percent higher than 12 months earlier. The increase in the CPI is mainly due to rising food prices, as the October year-on-year inflation rate for food and non-alcoholic beverages stood at 16.4 percent. In particular, prices of vegetables in October 2016 were 20 percent higher than 12 months earlier, while prices of bread and cereals increased by about 11 percent over the same period.

Food insecurity persists in eastern districts

Acute food insecurity persists in eastern districts of Kayonza and Nyagatare following a below-average 2016B output, harvested in June/July. In these areas, stocks have been quickly depleted and poor households started to rely on food markets earlier than usual. Although the recent planting activities have improved labour opportunities and provided some income, the lean season is expected to be long and harsh until early December, when first 2017A season crops will be available for local consumption.



Rwanda
Cereal production

	2011-2015 average	2015	2016 estimate	change 2016/2015
	000 tonnes			percent
Maize	559	550	580	5
Sorghum	148	145	150	3
Rice (paddy)	86	97	105	8
Others	84	77	77	0
Total	877	869	912	5

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

According to UNHCR, as of late September, about 82 000 refugees from Burundi are hosted in the Mahama (Kirehe District in the Eastern Province) and Kigali camps, and their food security is essentially guaranteed by continued humanitarian assistance.



GIEWS Country Brief Rwanda

Reference Date: 21-October-2016

FOOD SECURITY SNAPSHOT

- Favourable start of 2017A cropping season
- Food prices on the rise
- Acute food insecurity persists in some eastern districts
- Significant number of refugees from Burundi in need of humanitarian assistance

Favourable start of 2017A agricultural season

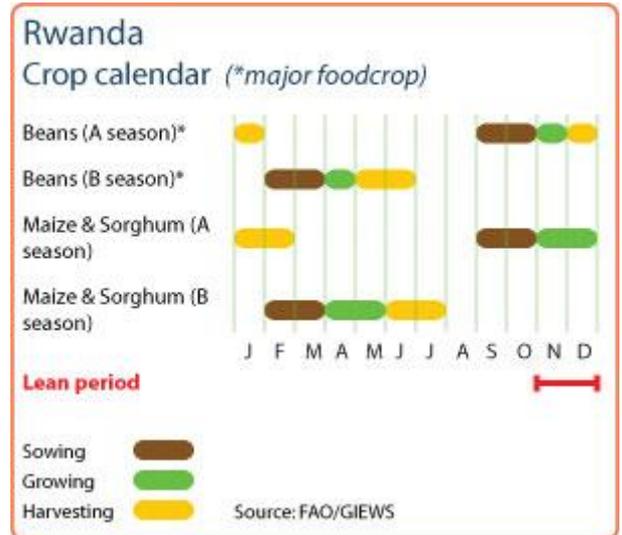
Planting of the 2017A season crops, normally harvested from December, started in August in paddy-growing areas and continued in September when the bulk of the planting of the major food crops took place. Seasonal rainfall had a timely onset during the second dekad of September and has been favourable so far, even in eastern semi-arid provinces, benefitting crop establishment and germination. Crop yields will depend on rainfall amount and distribution for the remainder of the season: the latest IGAD regional consensus climate outlook indicates an increased likelihood of below average rainfall over most of the country, with warmer-than-average temperatures. As a result, a close monitoring of weather-related variables is warranted.

Food prices on the increase

According to the National Statistics Institute of Rwanda, the Consumer Price Index (CPI) increased by about 2 percent between August and September 2016, when it was 7 percent higher than 12 months earlier. The increase in the CPI is mainly due to rising food prices, as the September year-on-year inflation rate for food and non-alcoholic beverages stood at 13.4 percent. In particular, prices of vegetables in September 2016 were 18.5 higher than 12 months earlier. Food price increases are mainly driven by tight domestic availabilities following the below-average 2016B season harvest in eastern districts and reduced imports from the United Republic of Tanzania.

Food insecurity persists in eastern districts

Acute food insecurity persists in eastern districts of Kayonza and Nyagatare following a below-average 2016B output, harvested in June/July. In these areas, stocks have been quickly depleted and poor households started to rely on food markets earlier than usual. Although the ongoing planting activities are improving labour opportunities and providing some income, the lean season is expected to be long and harsh until early December, when first 2017A season crops will be available for local consumption.



Rwanda Cereal production

	2011-2015 average	2015	2016 estimate	change 2016/2015
	000 tonnes			percent
Maize	559	550	580	5
Sorghum	148	145	150	3
Rice (paddy)	86	97	105	8
Others	84	77	77	0
Total	877	869	912	5

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

According to UNHCR, as of late September, about 82 000 refugees from Burundi are hosted in the Mahama (Kirehe District in the Eastern Province) and Kigali camps, and their food security is essentially guaranteed by continued humanitarian assistance.

Reference Date: 27-April-2016

FOOD SECURITY SNAPSHOT

- Favourable prospects for 2016B agricultural season
- Above-average production estimates for 2016A season
- Food prices declining in most markets as 2016A season crops increase supplies
- Significant number of refugees from Burundi in need of humanitarian assistance

Favourable prospects for 2016B agricultural season

Planting of the 2016B season crops, to be harvested by May, was completed in March and production prospects are favourable, especially in western and central highlands. Rains started at the beginning of February in most southern cropping areas and were well-established in the whole country by early March. Meteorological forecasts for the month of May indicate an increased likelihood of normal to above-normal rainfall, which are expected to have a favourable impact on 2016B season production.

Above-average output for 2016A season crops

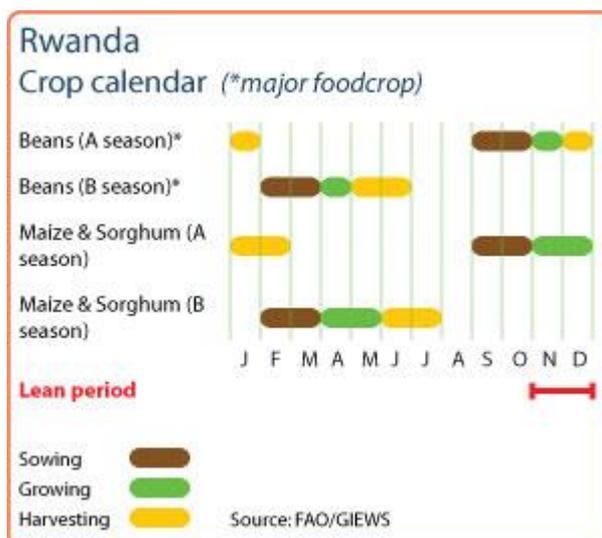
Harvesting of the 2016A season crops was finalized in February. The season's output is estimated at above-average levels due to abundant, well-distributed and prolonged "short-rains" between October and January which induced farmers to substantially increase area planted with maize, beans and cassava and benefited yields. However, production has been below average in some eastern cropping areas, especially in the districts of Kayonza, Kirehe and Nyagatare, due to erratic rains at the beginning of the season.

Staple food prices declining in most markets as 2016A season crops increase supplies

Prices of main staples, cassava flour, beans and maize, which were firm throughout 2015, significantly declined in early 2016 in most markets, as newly-harvested 2016A season crops increased supplies. In February 2016, beans were traded in the capital, Kigali, at RWA 400 per kg, nearly 40 percent less than in December 2015. However, higher prices were recorded in the markets located in some eastern districts where a below-average output was gathered. In the Nyagatare retail market, beans were traded in February at RWA 450 per kg, well above the price of RWA 300-350 per kg registered one year before.

Food security conditions are generally good

Food security conditions have improved since last December when the 2016A season crops started to be available for local consumption, ending the main lean season. Agricultural activities related to cultivation of the 2016B season crops are providing labour opportunities for poor households, improving their purchasing power and access to food. However, food security is deteriorating in some eastern districts as stocks have been depleted earlier than usual following the below-average 2016A production, and households rely more on markets to meet their food needs.



Rwanda
Cereal production

	2010-2014 average	2014	2015 estimate	change 2015/2014
	000 tonnes			percent
Maize	536	480	550	15
Sorghum	151	145	145	0
Rice (paddy)	86	73	97	33
Others	85	77	77	0
Total	858	775	869	12

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

According to UNHCR, as of end-March, about 75 700 refugees from Burundi are hosted in the Mahama (Kirehe district in the Eastern Province) and Kigali camps, and their food security is essentially guaranteed by continued humanitarian assistance.

Reference Date: 07-March-2016

FOOD SECURITY SNAPSHOT

- Favourable early prospects for 2016B agricultural season
- Above average production estimates for 2016A season
- Food prices declining in most markets as 2016A season crops increase supplies
- Significant number of refugees from Burundi in need of humanitarian assistance

Planting ongoing of 2016B season crops

Land preparation and planting of the 2016B season (February-July) crops is underway. Rains started at the beginning of February in most southern cropping areas, while the rest of the country is still generally dry. Meteorological forecasts for the March-May period indicate an increased likelihood of normal to above-normal rainfall, which are expected to have a favourable impact on 2016B season production.

Above average output for 2016A season crops

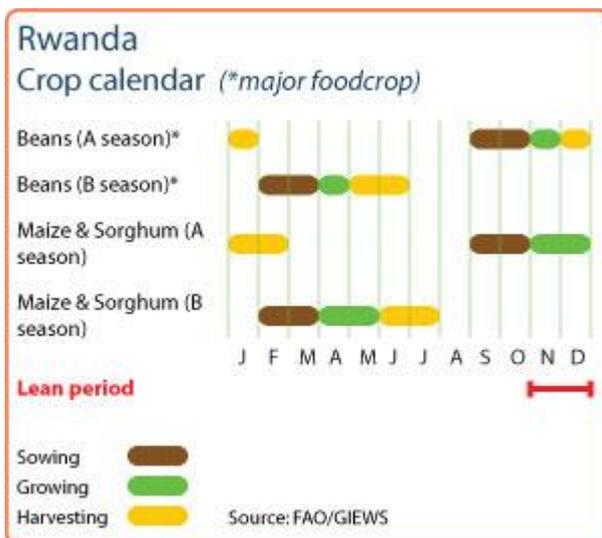
Harvesting of the 2016A season crops was finalized in February. The season's output is estimated at above-average levels due to abundant, well-distributed and prolonged "short-rains" between October and January which favoured yields and induced farmers to substantially increase area planted with maize, beans and cassava. However, production has been below average in some eastern cropping areas, especially in districts of Kayonza, Kirehe and Nyagatare, due to erratic rains at the beginning of the season.

Staple food prices declining in most markets as 2016A season crops increase supplies

Prices of main staples, cassava flour, beans and maize, which were firm throughout 2015, significantly declined in early 2016 in most markets as newly-harvested 2016A season crops increased supplies. In February 2016, beans were traded in Kigali at RWA 400 per kg, nearly 40 percent less than in December 2015. However, higher prices are recorded in the markets located in some eastern districts where a below-average output was gathered. For instance, in the Nyagatare retail market, beans were traded in February at RWA 450 per kg, well above the price of RWA 300-350 per kg registered one year before.

Satisfactory national supplies improve food security conditions

Food security conditions have improved since last December when the 2016A season crops started to be available for local consumption, ending the main lean season. Ongoing activities of land preparation and planting of 2016B season crops are providing labour opportunities for poor households, improving their purchase capacity and access to food. However, food security of households in Eastern districts that harvested below-average outputs are likely to deteriorate as stocks will be depleted earlier than usual during the April-June minor lean season and food prices are expected to remain high.



Rwanda
Cereal production

	2010-2014 average	2014	2015 estimate	change 2015/2014
	000 tonnes			percent
Maize	536	480	550	15
Sorghum	151	145	145	0
Rice (paddy)	86	73	97	33
Others	83	67	67	0
Total	856	765	859	12

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

According to UNHCR, as of end-February, about 74 000 refugees from Burundi are hosted in Mahama (Kirehe District in the East) and Kigali camps, and their food security is essentially guaranteed by continued humanitarian assistance.

Reference Date: 06-October-2015

FOOD SECURITY SNAPSHOT

- Satisfactory 2015B harvest except in some areas affected by below-average rainfall
- Prices of maize and beans on the rise
- Minimal levels of food insecurity, except in some southern and eastern parts

Satisfactory 2015B harvest except in some areas affected by below-average rainfall

Harvesting of 2015B season crops was concluded in July. After a timely onset of seasonal rains in February, a dry spell in the first two dekads of March had a negative impact on crop establishment and required some replanting of cereal and bean crops. Subsequently, rainfall resumed to above-average levels in April and May in several cropping areas and subsided later than usual, continuing into the second dekad of June. By contrast, in some southern, eastern and northern parts, precipitation was near average, and thus insufficient to erode the moisture deficits caused by the early season dryness. In these areas, according to remote sensing analysis (see Vegetation Health Index map), vegetation conditions in July were below-average.

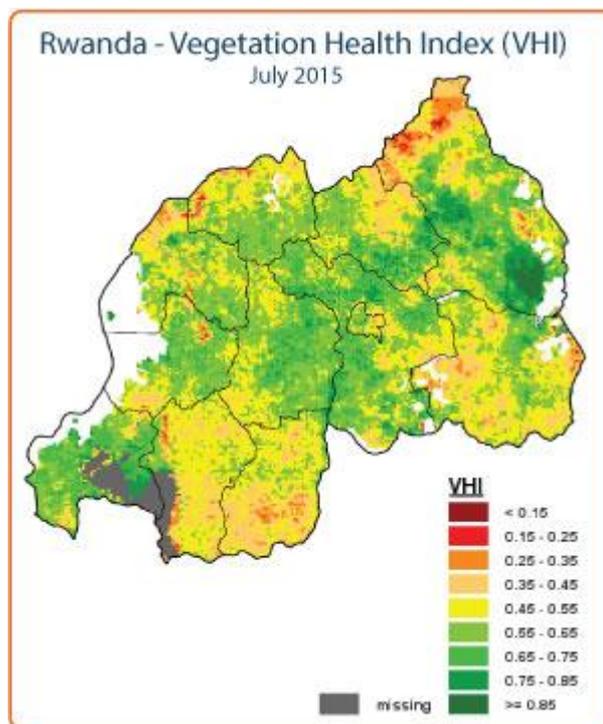
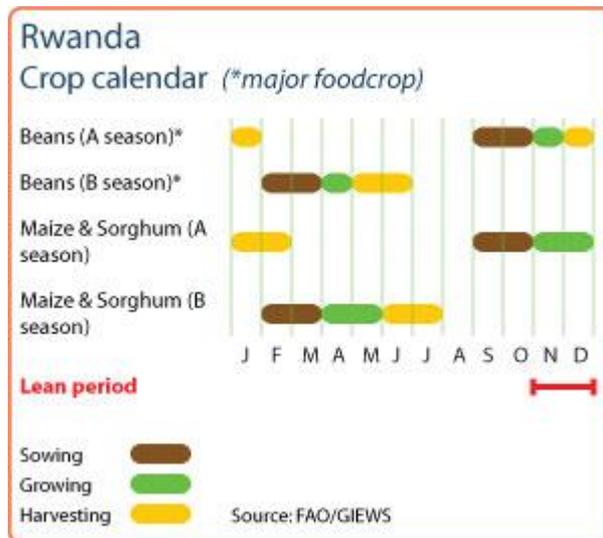
Harvesting of the minor 2015C season crops, which approximately accounts for 10-15 percent of annual food crop production, mainly potatoes and beans, has been recently concluded and the production outlook is favourable. Since the C season crops are usually grown in marshlands using residual moisture from the previous rainy season, current yields are estimated at above-average levels due to the later-than-usual conclusion of the 2015B rainy season.

Land preparation of the 2016A season, for harvest early next year, started in August in paddy-growing areas and continued during September when the bulk of the planting of the major food crops took place. After a timely onset of seasonal rainfall in early September, a dry spell in mid-September required some re-plantings of bean crops. Subsequently, rains resumed in late September. Above-average rainfall forecast for the remainder of the short rainy season (September-December) is expected to benefit crop performance.

The overall cereal production in 2015 is forecast at about 859 000 tonnes, 10 percent higher than the reduced output obtained in 2014 and equal to the last five-year average.

Prices of maize and beans on the increase

Despite the recent completion of the B season harvest, prices of maize and beans in the Kigali market increased between July and September by 20 and 23 percent, respectively, mainly due to the increase in demand following the influx of Burundian refugees and to the devaluation of the local currency against the US dollar. However, despite the recent increases, prices of both maize and beans in September were around the same levels of 12 months earlier, due to the availability of stocks from the satisfactory 2015 A harvest. Food prices are expected to continue to rise



during the main lean season (October-December), until crops of the 2016A season harvest become available for consumption at the beginning of next year.

Minimal levels of food insecurity, except in some southern and eastern parts

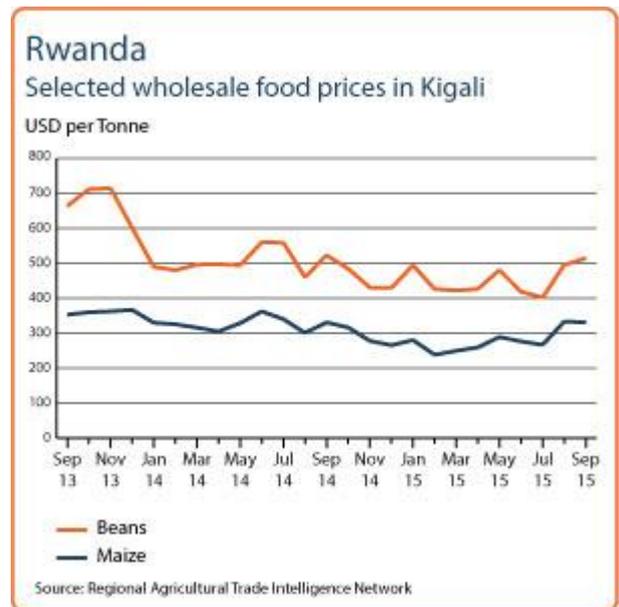
“Minimal” levels (IPC Phase: 1) of acute malnutrition are reported in most areas of the country. However, the lean season has already started one month earlier than usual for poor households in parts where cereal harvests have been below average due to erratic rainfall and cassava harvests have been negatively impacted by the Cassava Brown Streak Disease (CBSD), such as the Central Plateau Cassava and Coffee Zone in Southern Province and the Bugesera cassava zone in Eastern Province. As a result of reduced availabilities, compounded by access constraints due to increasing fuel and food prices, “Stressed” levels of food insecurity (IPC Phase: 2) will persist in the Bugesera Cassava Zone, where cassava harvests have been consistently low since December 2014 due to substantial disease-related losses, while household food insecurity is likely to deteriorate in October from “Minimal” (IPC Phase: 1) to “Stressed” (IPC Phase: 2) in the Central Plateau Cassava and Coffee Zone in Southern Province. In these areas, food security conditions are expected to improve by January 2016 with the beginning of the 2016A season harvest. However, the prevalence of Cassava Mosaic Disease (CMD) and current existence of the Cassava Brown Steak Disease (CBSD) implies that cassava-based production systems are under threat from various strains of Mosaic (viral) Disease. As a result, most households in the Bugesera district and Southern Province will still be vulnerable to production shortfalls and thus threatened in their food security.

The number of refugees from Burundi has recently declined; however, an estimated 69 400 Burundi refugees still resided in Rwanda as of mid-September, exerting pressure on the food and income sources of poor host households.

Rwanda
Cereal production

	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes			percent
Maize	536	480	550	15
Sorghum	151	145	145	0
Rice (paddy)	89	90	97	8
Others	83	67	67	0
Total	859	782	859	10

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



Reference Date: 28-April-2015

FOOD SECURITY SNAPSHOT

- Harvesting of 2015A season crops completed
- Prices of cereals and beans continue to decline
- Minimal levels of food insecurity in most areas of the country

Erratic rains affect start of 2015B season

Planting of the 2015B main season crops has just been completed in March and most crops are at the emerging/vegetative stage. The long rainy season (February to May) started on time, but rainfall amounts have been below average during the first half of March, requiring some replanting of cereal and bean crops. Although rains resumed during the last dekad of March with above-average amounts in northern and central districts, significant soil moisture deficits still persist in the Eastern Province. Close monitoring of rainfall amounts and distribution during the remainder of the season is warranted as they will determine the overall performance of the 2015B season crop production, to be harvested by early June.

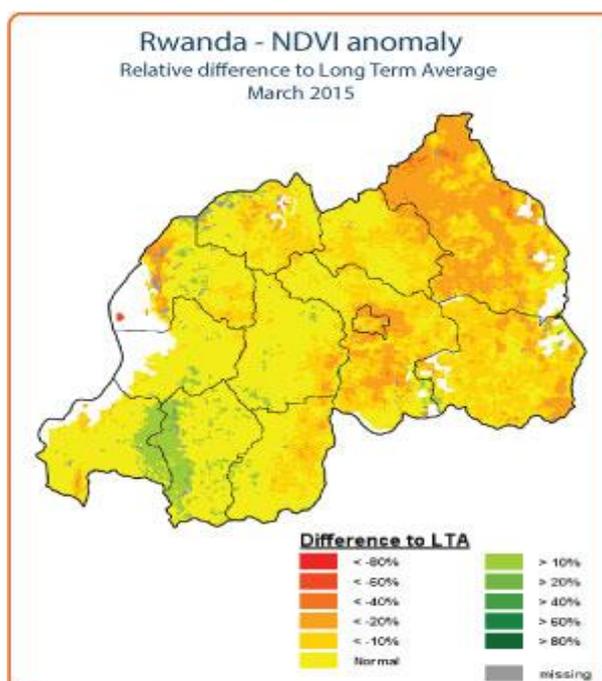
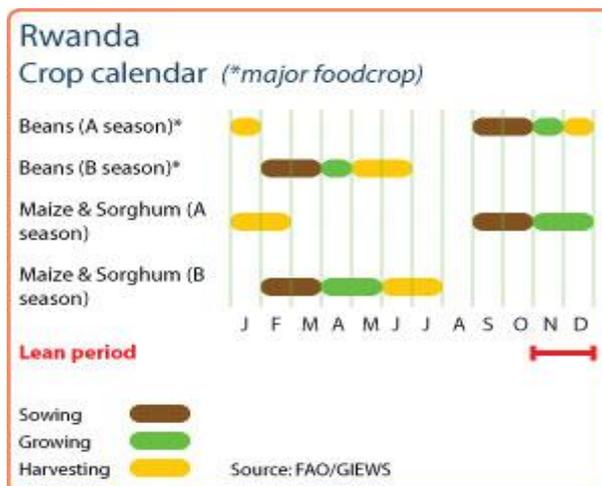
Harvesting of 2015A season crops (which represent about 30-40 percent of total crop production) was completed by the end of February and aggregate production is estimated at near-average level as the short season rains (September-December) have been generally favourable across the country. Below-average 2015A season production was, however, harvested in Gisara, Huye, Nyanza, Nyamagabe, Nyaruguru districts of Southern Province as well as in Bugusera district of Eastern Province due to unfavourable weather conditions.

Cereals and beans prices declining in main wholesale markets

Wholesale prices of cereals and beans have started to decline in February 2015, following the commercialization of the bulk of the 2015A season harvest and the sustained flow of imports from Uganda and the United Republic of Tanzania. In March 2015, beans and maize were traded in the Kigali wholesale market at about USD 430 and USD 255 per tonne, respectively, about 10-14 percent below the peak price of January 2015 and 14-20 percent below the level of one year earlier. Similarly, the average price of rice (about USD 860 per tonne) declined by 13 percent between January and March 2015.

Minimal levels of food insecurity in most areas of the country

Households' food security conditions have improved since mid-December 2014 as green crops from the 2015A season started to be available for local consumption. Currently, minimal levels (IPC Phase 1) of acute malnutrition are reported in most areas of the country. The situation is expected to deteriorate in April as household food stocks begin to gradually decline. Particular concern is for poor households in Gisara, Huye, Nyanza, Nyamagabe, Nyaruguru districts of Southern Province and Bugusera district of Eastern Province that experienced two consecutive below-average harvests (2014B and 2015A seasons).

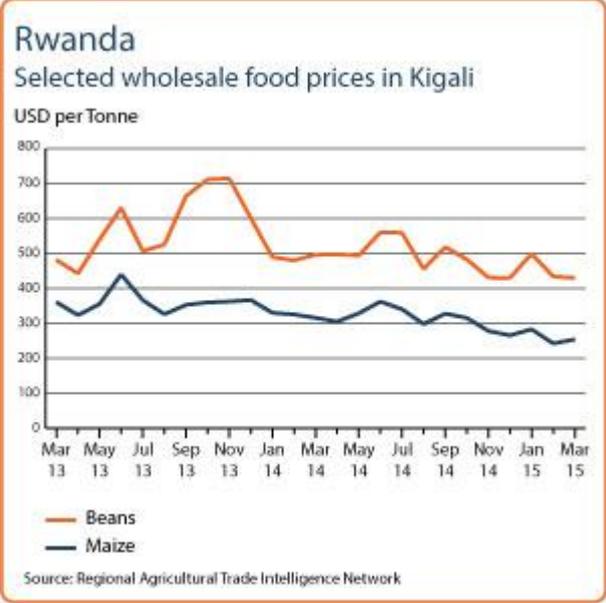


Rwanda
Cereal production

	2009-2013 average	2013	2014 estimate	change 2014/2013
	000 tonnes		percent	
Maize	497	668	480	-28
Sorghum	157	158	145	-8
Rice (paddy)	81	94	75	-20
Others	86	79	67	-15
Total	821	999	767	-23

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

Rwanda is hosting about 75 000 refugees, mainly from eastern Democratic Republic of Congo. They rely entirely on international food assistance to meet their nutritional needs as they have limited livelihood opportunities. Since last March, almost 21 000 people fled Burundi due to political tensions ahead of presidential, parliamentary and local elections scheduled between May and September 2015. They are currently hosted in two transit centres in Bugesera and Nyanza districts. However, due to the sharp increase in new arrivals at the end of April, the conditions in the two reception centres have become more and more congested and all refugees are expected to be relocated to a new camp in Mahama, Eastern Province.



Reference Date: 22-January-2015

FOOD SECURITY SNAPSHOT

- Harvesting of 2015A season crops almost finalized
- Maize and beans prices continue to decline in main markets
- Minimal levels of food insecurity in most areas of the country

Near-average production expected for 2015A season crops

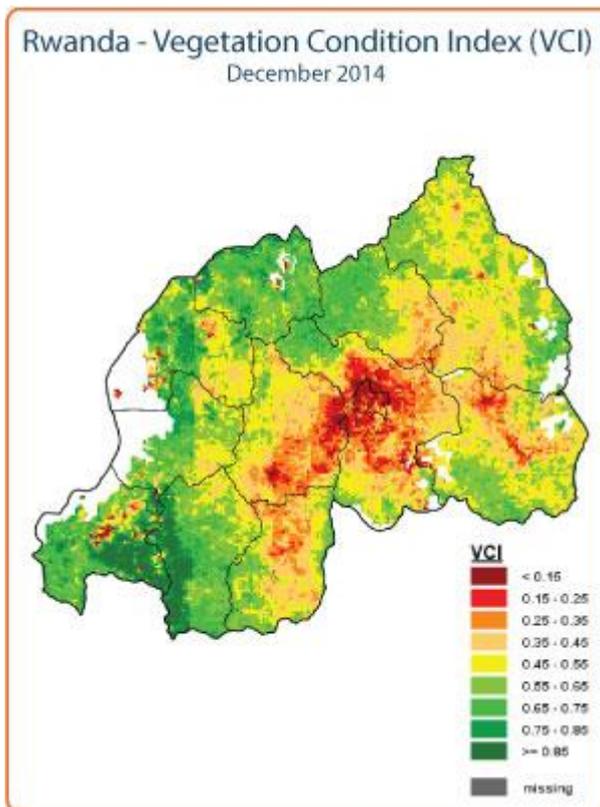
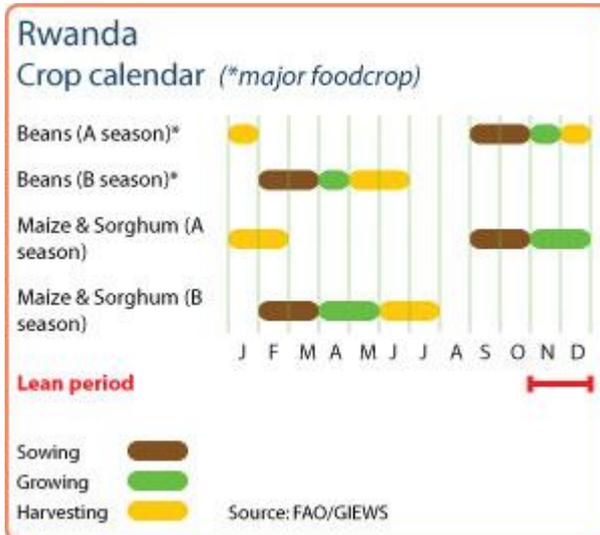
Harvesting of 2015A season crops (which represent about 30-40 percent of total crop production) is underway and will be completed by the end of February. Seasonal production of cereals and pulses is forecast at near-average level as short rains (September-December) have been generally favourable across the country. According to satellite image analyses, moderate levels of moisture stress were reported in December in some central highland areas, around the capital city Kigali, leading to relatively lower yields and declining pasture conditions. Reduced cassava production is expected in southern districts of Ruhango, Kamonyi and Muhanga where crops were significantly affected by the brown streak disease.

Maize and beans prices continue to decline in main wholesale markets

Wholesale prices of maize and beans have started to decline in October 2014, following the commercialization of the bulk of 2014B season harvest and an increasing flow of imports from Uganda and the United Republic of Tanzania. In December 2014, beans and maize were traded in the Kigali wholesale market at about USD 430 and USD 265 per tonne, respectively, about 18 percent the peak price of September 2014 and 28 percent below the level of one year earlier. Similarly, the average price of rice (about USD 850 per tonne) declined by 13 percent during the last three months.

Minimal levels of food insecurity in most areas of the country

Households' food security conditions have improved since mid-December as green crops, especially beans, from the 2015A season started to be available for local consumption. Currently, minimal levels (IPC phase 1) of acute malnutrition are reported in most areas of the country. The situation is expected to improve further as harvesting operations progress and food stocks are going to be replenished, reducing households' dependence on markets. Prices of staple food are expected to continue declining during the next months.



Rwanda

Cereal production

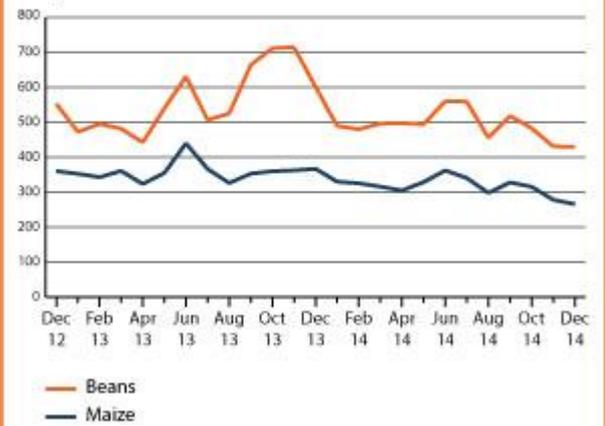
	2009-2013 average	2013	2014 estimate	change 2014/2013
	000 tonnes			percent
Maize	497	668	480	-28
Sorghum	157	158	145	-8
Rice (paddy)	81	94	75	-20
Others	86	79	67	-15
Total	821	999	767	-23

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

Rwanda

Selected wholesale food prices in Kigali

USD per Tonne



Source: Regional Agricultural Trade Intelligence Network

Reference Date: 28-October-2014

FOOD SECURITY SNAPSHOT

- Planting of 2015A season crops almost finalized
- Maize and beans prices continue to decline in main markets
- Minimal levels of food insecurity in most areas of the country

Planting of 2015A season crops is almost complete

Planting of the 2015A season crops (which represent about 30-40 percent of total crop production) started in August with the early onset of the short rainy season (September-December) and it is about to be completed. Reduction in the area planted with maize and beans is reported in some eastern agro-pastoral areas, where 2014B season crops have been affected by severe moisture deficits leading to shortage of local seeds. Despite a dry spell during the second dekad of September that delayed planting operations in some areas, rains have been generally favourable so far, benefitting germinating crops and improving pasture conditions as shown by positive NDVI anomalies. The whole country is forecast to receive average to above average rainfall amounts along the season.

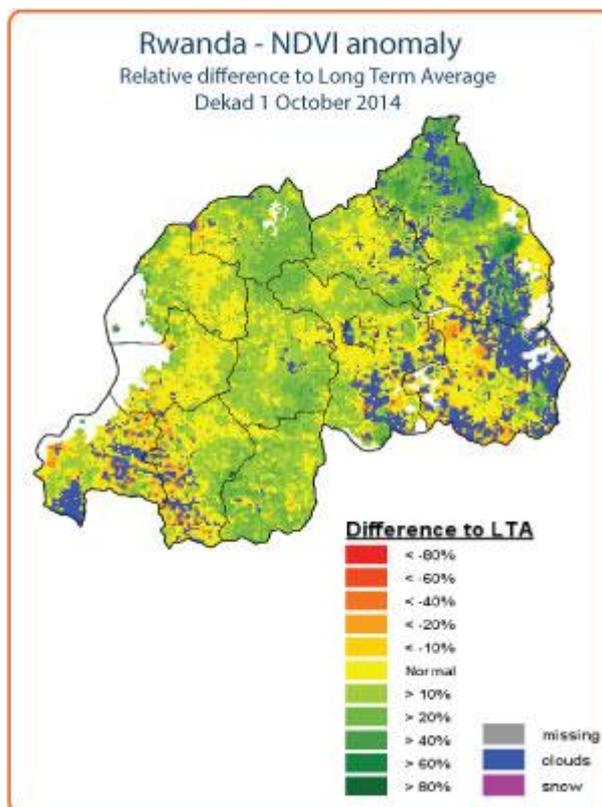
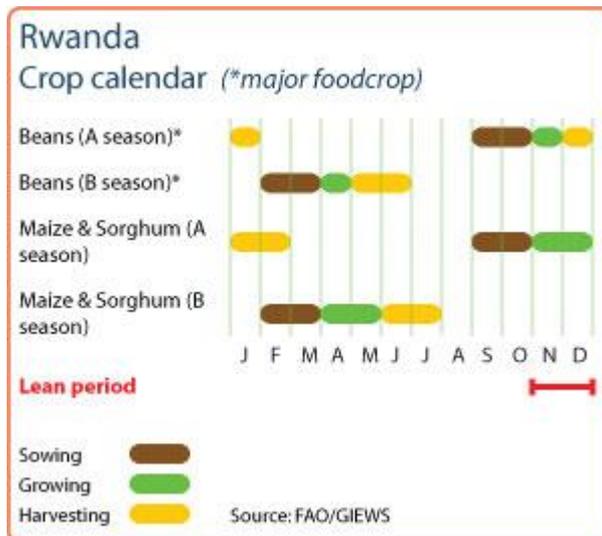
The overall cereal production in 2014 (including season A, B and the recently harvested minor C season) is forecast at about 786 000 tonnes, 21 percent below the bumper output obtained in 2013 and 4 percent below the last five-year average. The reduction is essentially due to unfavourable weather conditions that affected yields of both A and B season crops harvested last February and July, respectively.

Maize and beans prices continue to decline in Kigali wholesale market

After rising from May to June, prices of maize and beans have started to decline, following the 2014B season harvest and have been kept stable in recent months by increased imports from Uganda and the United Republic of Tanzania. In October 2014, beans were traded in the Kigali wholesale market at about USD 490 per tonne, about 32 percent below the price of one year earlier. Similarly, the average price of maize (USD 320 per tonne) declined by 12 percent during the last 12 months.

Minimal levels of food insecurity in most areas of the country

Minimal levels (IPC phase 1) of acute malnutrition are reported in most areas of the country. However, households affected by production shortfalls during the 2014B seasons are already facing stressed levels (IPC phase 2) of food insecurity as their food stocks have been depleted by September, increasing by one month the length of the main October-December lean season. Currently, these households are relying entirely on market purchases to meet their food needs, with the frequent adoption of negative coping strategies such as above-average sales of livestock. In these areas, food security conditions are expected to improve only by January 2015 with the beginning of the 2015A season harvest.



Rwanda

Cereal production

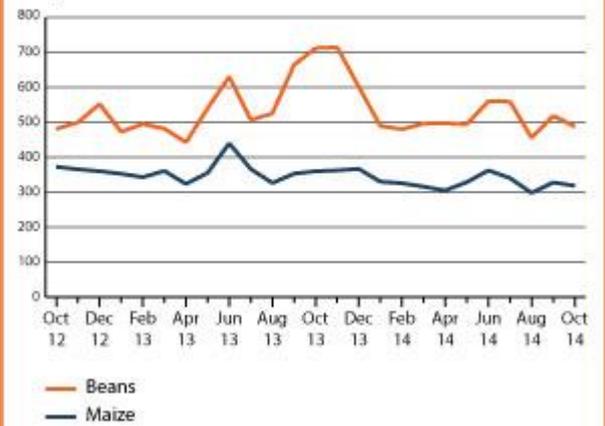
	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes			percent
Maize	497	668	480	-28
Sorghum	157	158	145	-8
Rice (paddy)	81	94	94	0
Others	86	79	67	-15
Total	821	999	786	-21

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

Rwanda

Selected wholesale food prices in Kigali

USD per Tonne



Source: Regional Agricultural Trade Intelligence Network

Reference Date: 15-September-2014

FOOD SECURITY SNAPSHOT

- Water deficit during 2014B season affected crop production and livestock body conditions, especially in eastern areas
- Declining maize and beans prices following the 2014B harvest
- Minimal levels of food insecurity in most areas of the country

Significant moisture deficit in eastern agro-pastoral areas affected 2014B season crops and livestock

Harvesting of 2014B season crops was concluded in July and production is estimated at below-average levels. In some eastern agro-pastoral areas, where moisture deficits have been significant, maize and beans output is reported to be about 50 percent below average. The erratic and short 2014B rainy season has also affected pasture and water resources, especially in southern areas of the Eastern and Southern Provinces (mainly in the districts of Kirehe, Bugesera, Ngoma, Gisagara and Nyaruguru, see map), with consequent deterioration of livestock body conditions.

Harvesting of the minor 2014C season, which represents about 10-15 percent of annual food crop production, mainly potatoes and beans, is ongoing and production is forecast at below-average levels. Since the C season crops are usually grown in marshlands using residual moisture from the previous rainy season, current yields are forecast at low levels due to the poor performance of the 2014B rainy season.

Land preparation of the 2015A season started in August in paddy-growing areas and will continue during September when the bulk of the planting of the major food crops is expected to take place. Above-average rains are forecast in this short rainy season (September-December) which is expected to benefit the 2015A season crops for harvest early next year.

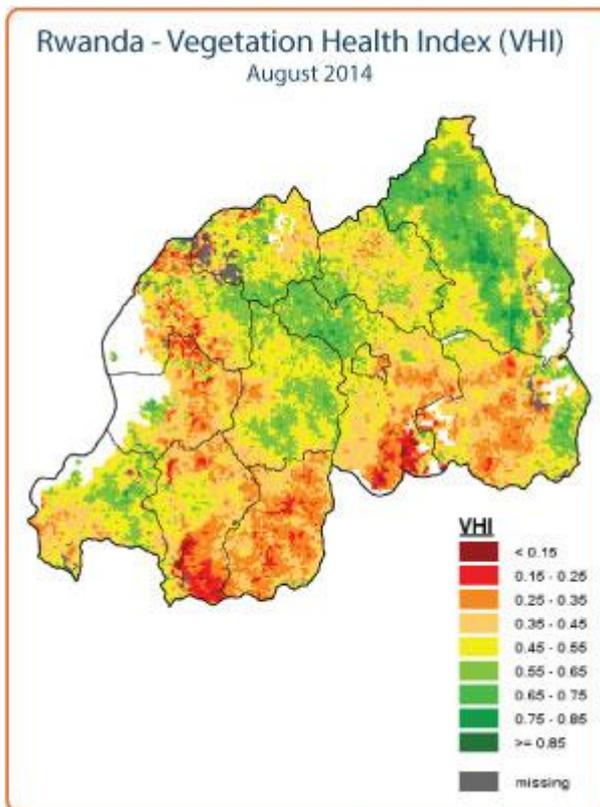
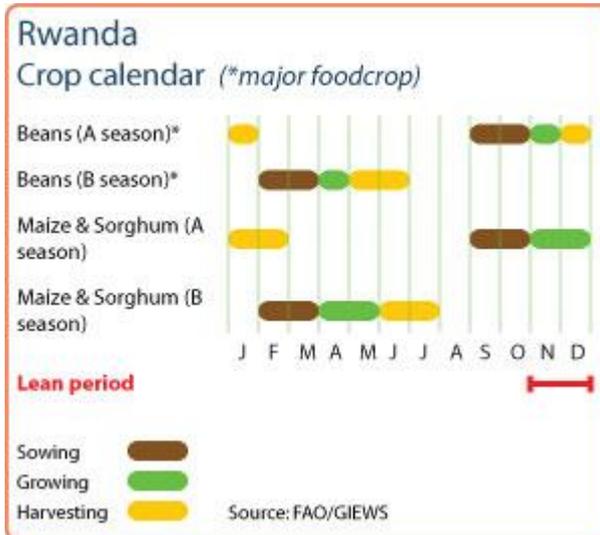
The overall cereal production in 2014 is forecast at about 767 000 tonnes, 23 percent below the bumper output obtained in 2013 and 7 percent below the last five-year average.

Maize and beans prices declined in July and August

After rising from May to June, prices of maize and beans have started to decline, following the 2014B season harvest. In August 2014, maize was traded in the Kigali market at about USD 300 per tonne, about 9 percent below the price of one year earlier. Similarly, the average price of beans (USD 455 per tonne) declined by 13 percent during the last 12 months. Given the below-average 2014B season crop production, food prices are expected to rise again during the main lean season (October-December), until crops of the 2015A season harvest become available for consumption at the beginning of next year.

Minimal levels of food insecurity in most areas of the country

Minimal levels (IPC phase 1) of acute malnutrition are reported in most areas of the country. However, households affected by production shortfalls during the 2014B seasons are expected to face stressed levels



(IPC phase 2) of food insecurity by September as their food stocks will be depleted at least one month earlier than usual. Since then, these households rely entirely on market purchases to meet their food needs, with the frequent adoption of negative coping strategies such as above-average sales of livestock. In these areas, food security conditions are expected to improve by January 2015 with the beginning of the 2015A season harvest.

Rwanda

Cereal production

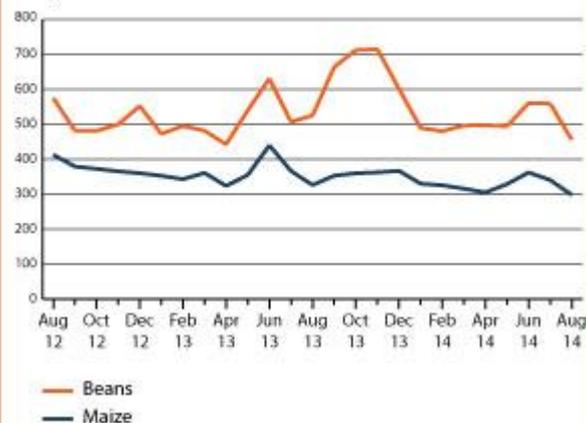
	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes			percent
Maize	497	668	480	-28
Sorghum	157	158	145	-8
Rice (paddy)	84	94	75	-20
Others	86	79	67	-15
Total	824	999	767	-23

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

Rwanda

Selected wholesale food prices in Kigali

USD per Tonne



Source: Regional Agricultural Trade Intelligence Network

Reference Date: 25-August-2014

FOOD SECURITY SNAPSHOT

- Water deficit during 2014B season affected crop production and livestock body conditions, especially in eastern areas
- Declining maize and beans prices following the 2014B harvest
- Minimal levels of food insecurity in most areas of the country

Significant moisture deficit in eastern agro-pastoral areas affected 2014B season crops and livestock

Harvesting of 2014B season crops was concluded in July and production is estimated at below average levels. In some eastern agro-pastoral areas, where moisture deficits have been significant, maize and beans output is reported to be about 50 percent below average. The erratic and short 2014B rainy season has also affected pasture and water resources, especially in south areas of the Eastern and Southern Provinces (mainly in the districts of Kirehe, Kayonza Ngoma and Gisagara, see map), with consequent deterioration of livestock body conditions.

Harvesting of the minor 2014C season, which represents about 10-15 percent of annual food crop production, mainly potatoes and beans, is expected to start at the beginning of September and production is forecast at below average levels. Since the C season crops are usually grown in marshlands using residual moisture from the previous rainy season, current yields are forecast at low levels due to the poor performance of the 2014B rainy season.

Land preparation of the 2015A season has just started in paddy growing areas and will continue in September when the bulk of planting of major food crops is expected to take place. Above-average rains are forecast in this short rainy season (September-December) which is expected to benefit the 2015A season crops for harvest early next year.

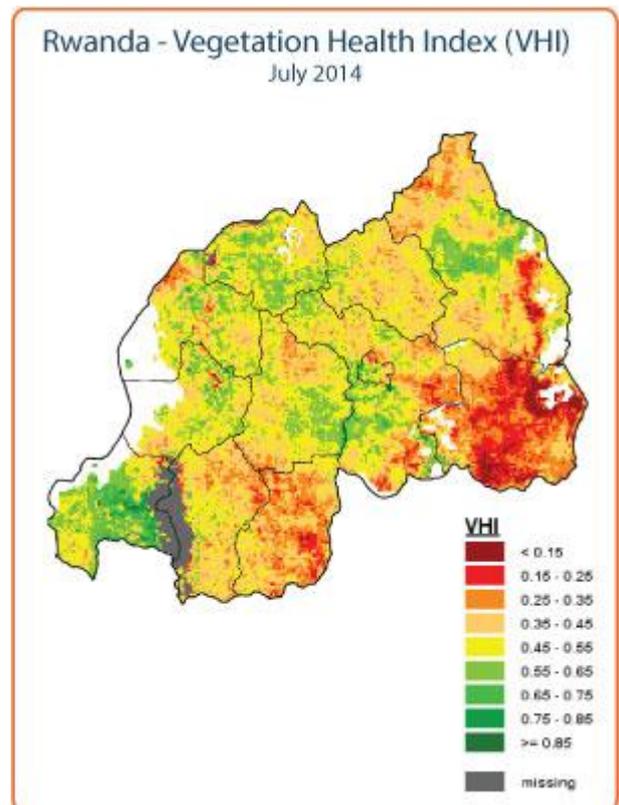
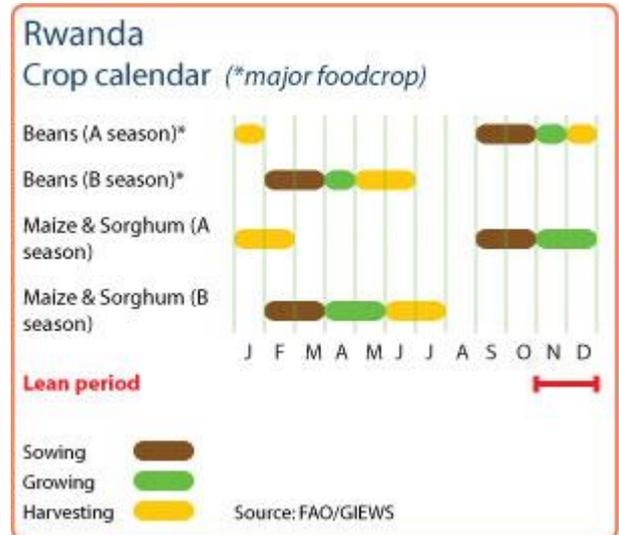
The overall cereal production in 2014 is forecast at about 767 000 tonnes, 23 percent below the bumper output obtained in 2013 and 7 percent below the last five-year average.

Maize and bean prices declined in July and August

After rising from May to June, prices of maize and beans have started to decline, following the 2014B season harvest. By early August 2014, maize was traded in the Kigali market at USD 295 per tonne, about 9 percent below the price of one year earlier. Similarly, the average price of beans (USD 455 per tonne) declined by 13 percent during last 12 months. Given the below-average 2014B season crop production, food prices are expected to rise again during the main lean season (October-December), until crops of the 2015A season harvest become available for consumption at the beginning of next year.

Minimal levels of food insecurity in most areas of the country

Minimal levels (IPC phase 1) of acute malnutrition are reported in most areas of the country. However, households affected by production shortfalls during the 2014B seasons are expected to face stressed levels (IPC phase 2) of food insecurity by September as their food stocks will be



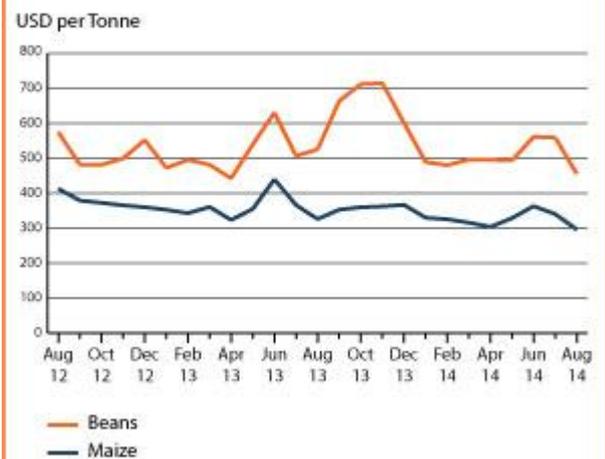
depleted at least one month earlier than usual. Since then, these households rely entirely on market purchases to meet their food needs, with frequent adoption of negative coping strategies such as above-average sales of livestock. In these areas, food security conditions are expected to improve by January 2015 with the beginning of the 2015A season harvest.

Rwanda Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes			percent
Maize	497	668	480	-28
Sorghum	157	158	145	-8
Rice (paddy)	84	94	75	-20
Others	86	79	67	-15
Total	824	999	767	-23

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

Rwanda Selected wholesale food prices in Kigali



Source: Regional Agricultural Trade Intelligence Network

Reference Date: 28-May-2014

FOOD SECURITY SNAPSHOT

- Water deficit in most cropping areas likely to affect yields of the 2014B season crops to be harvested by June
- Maize prices declined following the 2014A harvest and imports from Uganda and the United Republic of Tanzania
- Minimal levels of food insecurity in most areas of the country

Significant moisture deficit in most cropping areas of the country affects yields of 2014B season crops

Harvesting of the 2014B season (February-July) beans crops is underway, while the cereal harvest is scheduled to begin in June. The long rainy season (March-May) started on time in early March, but it has been characterized by erratic distribution and below average amounts since early April. By late April, the FAO Agricultural Stress Index (ASI) indicated significant moisture stress in Northern, Eastern and parts of Southern provinces with likely negative effects on yields of sorghum, cassava and sweet potatoes.

The production of the 2014A season crops, harvested in February, is estimated at below-average levels. Significant production shortfalls, up to 50 percent of average, have been reported among subsistence farmers in the highlands of the Western province as well as in agro-pastoral areas in the Eastern province due to adverse weather conditions in October and November 2013 and an above average prevalence of maize stalk borers and aphids. Maize production was also affected by late seed distribution by Government service providers as well as poor seed quality.

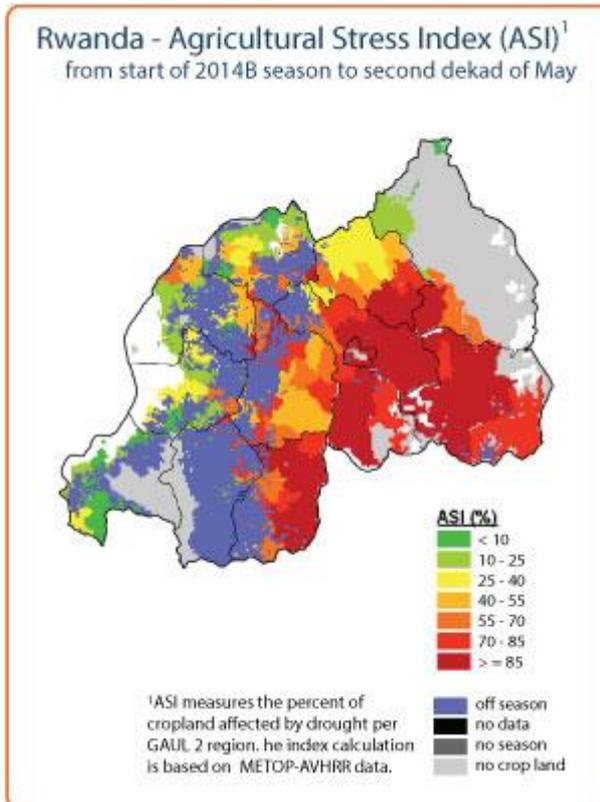
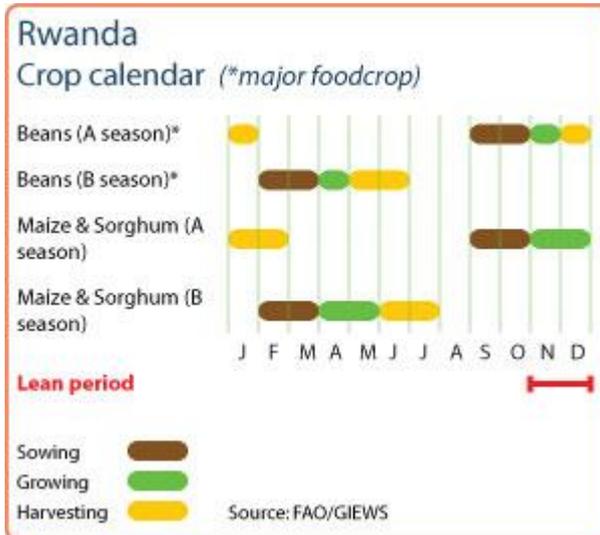
Accordingly, the overall cereal production in 2014 (including an average output of the minor 2014C season crops to be harvested between September and October) is tentatively forecast at about 760 000 tonnes, 7 percent below the last five-year average.

Maize prices declined due to improved availability

In the Kigali wholesale market, prices of maize slightly declined in recent months (-4 percent between February and April 2014), following the 2014A season harvest as well as the availability of imports from neighbouring Uganda and the United Republic of Tanzania. In April 2014, maize was traded in the Kigali market at about USD 310 per tonne, about 20 percent below the price of 12 months earlier. Prices of beans, the main staple, were quite stable during last two months, around USD 500 per tonne, well below the record level of over USD 700 per tonne registered at the end of last year.

Minimal levels of food insecurity in most areas of the country

Minimal levels (IPC phase 1) of acute malnutrition are reported in most areas of the country. However, households affected by production shortfalls during the 2014A season face stressed levels (IPC phase 2) of food insecurity as their food stocks were depleted by early March, about one month earlier than usual. Since then, these households rely entirely on market purchases to meet their food needs, with frequent adoption of negative coping strategies such as above-average sales of livestock. The



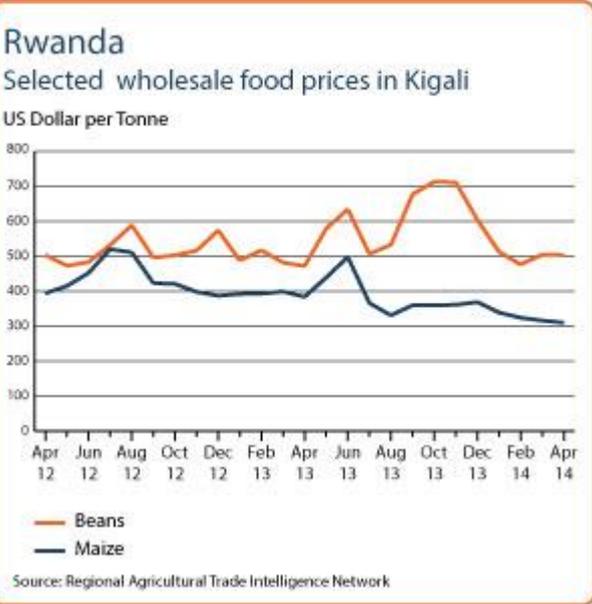
country's food security conditions are expected to improve by June with the beginning of the 2014B season harvest.

Rwanda

Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes			percent
Maize	464	500	460	-8
Sorghum	151	130	115	-12
Rice (paddy)	83	90	92	2
Others	87	88	83	-6
Total	786	808	750	-7

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



Reference Date: 11-February-2014

FOOD SECURITY SNAPSHOT

- The 2014 “A season” harvest forecast at average levels despite localized production shortfalls
- Food prices declining as newly harvested crops increase supplies
- Minimal levels of food insecurity, including in areas affected by production shortfalls

An average output expected from the 2014 “A season” cropping; some localized production shortfalls observed

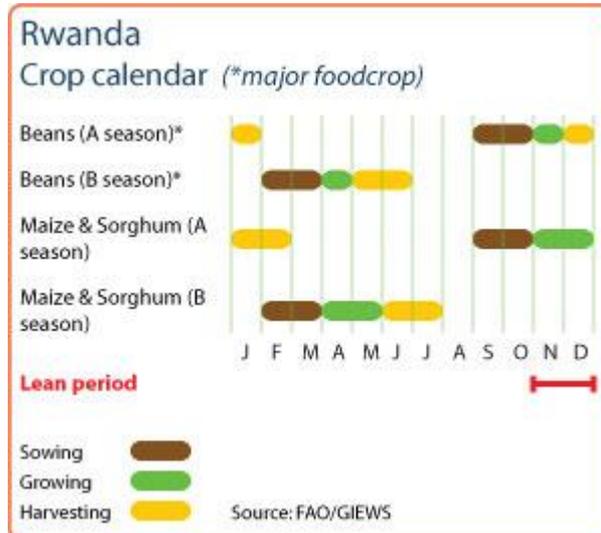
Harvesting of the 2014 “A season” (September-February) crops is currently underway. Production is expected at average levels, despite localized production shortfalls. In the Eastern Semi-Arid Agro-Pastoral zone, crops had to be replanted due to poor quality seeds, causing a delay in harvests and a decline in production levels. In addition, harvests are expected to be below average in parts of the Bugesera district in the Eastern Province and in some areas of the West Province, due to the effects of atypical dryness in October and November and an above-average prevalence of maize stalk borers and aphids.

Food prices declining as newly harvested crops increase supplies

Prices of beans, the main staple crop, after having peaked in October/November 2013, declined by 28 percent in December 2013 and January 2014 in Kigali’s wholesale market as the newly-harvested crops increased supplies. Currently, prices are at similar levels of twelve months earlier. Prices of maize decreased by 8 percent in January and currently they are below the levels of the same month of the previous year.

Minimal levels of food insecurity, including in areas affected by production shortfalls

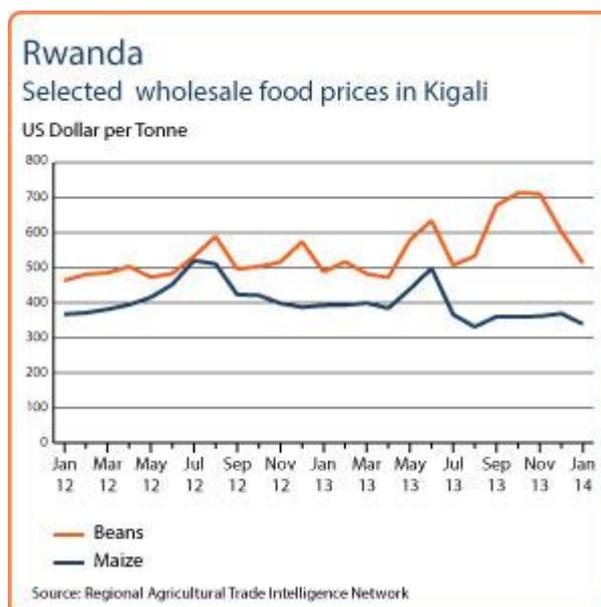
Most households will face minimal levels (IPC phase 1) of acute malnutrition until June 2014, when “B season” crops will be harvested. In the areas that were affected by production shortfalls, the reduction in the level of availabilities will not be sufficient to cause a significant deterioration of the food security situation.



Rwanda Cereal production

	2008-2012 average	2012	2013 estimate	change 2013/2012
	000 tonnes			percent
Maize	397	573	500	-13
Sorghum	154	139	120	-14
Rice (paddy)	82	84	90	7
Others	84	85	88	4
Total	717	881	798	-9

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



Reference Date: 01-October-2013

FOOD SECURITY SNAPSHOT

- Timely start of the short rainy season (September-December) observed
- Food prices increase due to low levels of food stocks
- Food security situation deteriorates in some areas that harvested well below 2013 B season crops in June/July

Planting of 2014 A season crops is underway

Harvesting of 2013 C season crops, which represents about 10 percent of annual production, is about to start and an average output is expected. Meanwhile, land preparation for planting 2014 A season crops (to be harvested from next January) is underway following the timely start of the short rainy season (September-December). Until the end of the year, rains are forecast at average to below average levels in eastern provinces, while better rainfall amounts are expected in the rest of the country.

Food prices on the rise due to early stock depletion

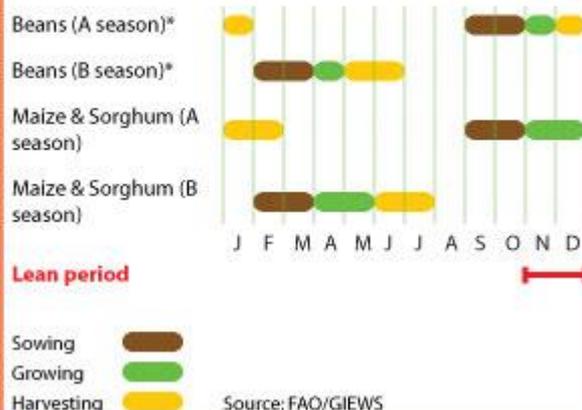
Prices of beans, the main staple crop, have increased by about 30 percent between July and September following the early depletion of stocks from the below average 2013 B season production harvested in June/July. In Kigali wholesale market, beans are currently traded at record price of about USD 650 per tonne. After having declined in July and August, wholesale prices of maize have also started to increase in September, but are still well below last year's level.

Deteriorating food security conditions in some agro-pastoral and subsistence farming areas

Currently, most households have minimal levels (IPC phase 1) of acute malnutrition. However, as food stocks dwindle and households increasingly access food through market purchases, food security conditions are expected to worsen until the end of the year. In particular, stressed levels (IPC phase 2) of acute malnutrition are expected in eastern semi-arid agro-pastoral livelihood zones and in eastern Congo Nile highland subsistence farming livelihood zone.

Rwanda

Crop calendar (*major foodcrop)



Rwanda

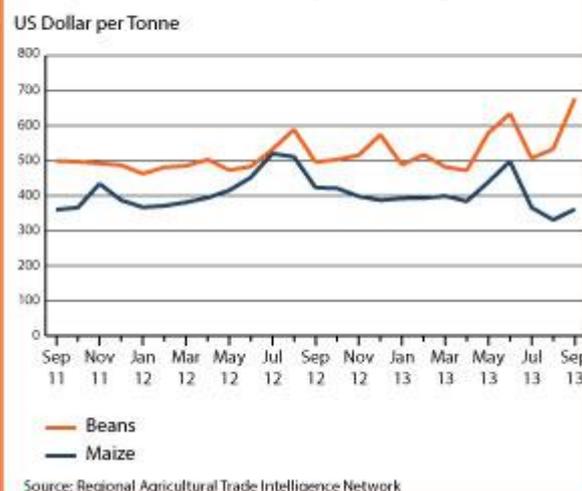
Cereal production

	2008-2012 average	2012	2013 forecast	change 2013/2012
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Maize	397	573	500	-13
Sorghum	154	139	120	-14
Rice (paddy)	82	85	90	6
Others	84	85	88	4
Total	717	882	798	-10

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

Rwanda

Selected wholesale food prices in Kigali



Reference Date: 20-March-2013

FOOD SECURITY SNAPSHOT

- Timely start of the 2013 B season rainfall
- Food prices decline in most markets
- Food security situation improves following the new harvest

Planting of 2013 B season crops is underway

Land preparation and planting for the 2013 B season (February-July) is underway. The long rainy season started on time by mid-February and rainfall amounts are forecast at average to above average levels along the season. Heavy rains during the last dekad of February have caused flash floods in some northern and western parts of the country and some damage to paddy and sugar cane fields was reported.

Well below average 2013 A season harvest in eastern districts

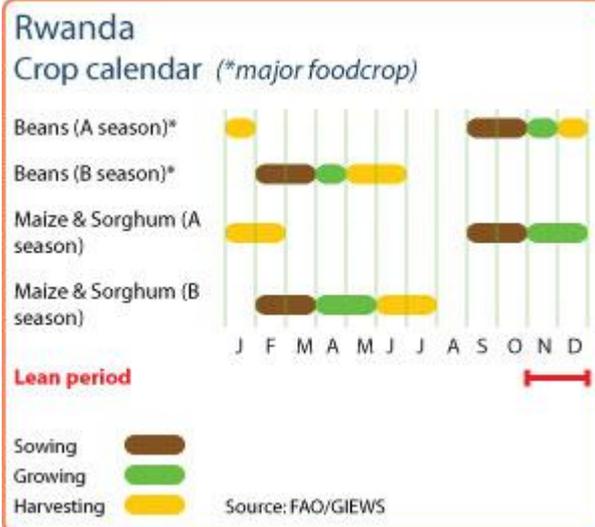
Harvesting of the 2013 A season (September-February) has recently been completed. Although official estimates are not yet available, the season's output is expected at below average levels. In particular, crop yields in eastern agro-pastoral districts have been severely affected by unfavourable A season rainfall. Erratic rains at the beginning of the season, followed by heavy rains and above average prevalence of crop diseases have also damaged crops in some subsistence farming highland areas in southern and western provinces.

Prices of main staple foods decline in most markets

In Kigali, wholesale prices of beans declined by 14 percent between December 2012 and early March 2013 with the arrival on markets of newly harvested 2012 A season crops. Currently, beans are traded at about USD 490 per tonne, similar to levels of March 2012. Similarly, wholesale prices of rice, which were firm at record levels in the second semester of 2012, declined by 20 percent between January and early March 2013, at USD 1 015 per tonne. Prices of maize also declined between January and early March 2013 by about 20 percent in Ruhengeri, located in a producing area in the northern province, while they remained stable at about USD 400 per tonne over the same period in the capital city due to the high local demand.

Improved food security situation following seasonal harvest

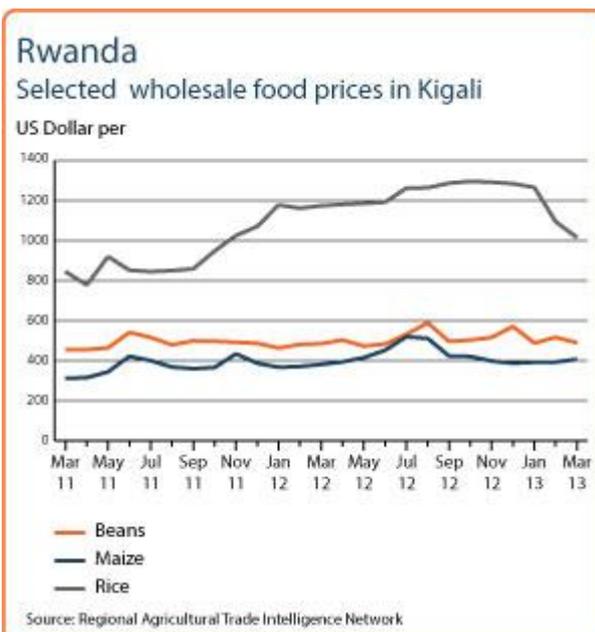
Generally stable food security situation prevail as household food stocks in most areas have been replenished by the newly harvested 2013 A season crops. However, several households in eastern agro-pastoral areas as well in subsistence farming highland areas in southern and western provinces that experienced a below average 2013 A season harvest are expected to face a long lean season as their meagre food stocks are quickly being depleted. Since end November 2012, an outbreak of foot-and-mouth disease in the Eastern Province induced local authorities to quarantine livestock within the infected districts. Cattle movements have been restricted and markets have been temporarily closed with negative consequences on the income of agro-pastoral households.



Rwanda Cereal production

	2007-2011 average	2011	2012 estimate	change 2012/2011
	000 tonnes			percent
Maize	299	508	203	-60
Sorghum	167	181	171	-6
Rice (paddy)	78	82	83	1
Others	72	92	103	12
Total	615	863	560	-35

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



Reference Date: 17-October-2012

FOOD SECURITY SNAPSHOT

- Planting of the 2013 A season crops is underway
- Maize, rice and beans prices remain at record high levels
- Food security situation likely to deteriorate in the coming months

Planting of 2013 A season crops is underway

The onset of the short rainy season (September-November) was 1-2 weeks earlier than usual, inducing farmers to start planting the 2013 A season crops (which represent about 30-40 percent of total crop production). The whole country is forecast to receive average to above average rainfall amounts along the season. However, some heavy rains may cause floods along riverbanks in some districts of Northern and Western provinces.

The 2012 cereal production is estimated at a below average 560 000 tonnes, about 35 percent less than the good output obtained in 2011. The reduction is due to unfavourable weather conditions that affected yields of both A and B season crops and to a significant shift in area planted from cereals to beans and tubers.

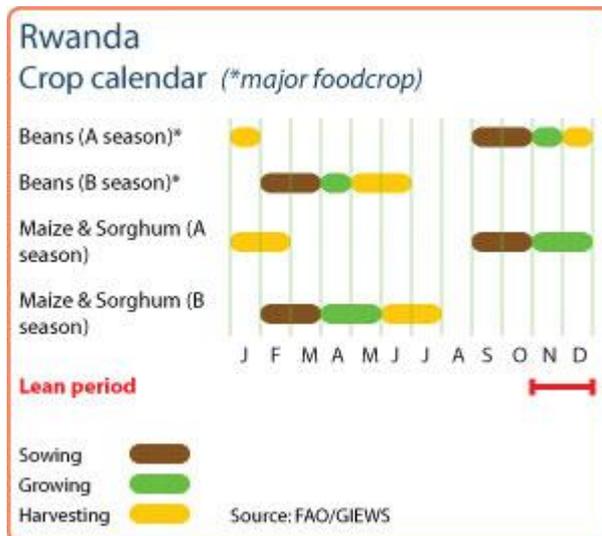
Prices of main staple foods at record high levels

In Kigali, since the beginning of the year, wholesale prices of rice have remained steady at record high levels. In July/August 2012, rice was traded at USD 1 265 per tonne, about 50 percent more than the previous year. Beans also reached record high levels in August 2012, at about USD 580 per tonne, registering a rise of about 25 percent during the last three months. After a steady rising trend since the beginning of the year, prices of maize slightly declined in August with the arrival on markets of newly harvested 2012 B season crops.

Food security conditions expected to worsen as the main lean season deepens

The ongoing lean season has increased food insecurity among poorer households is expected to continue until the start of the 2013 A season harvest in December. Food stocks are quickly running out following the below average crop production of 2012 B season harvested last June/July, especially in semi-arid agro-pastoral areas, and food prices are likely to remain at very high levels, eroding households' purchasing power.

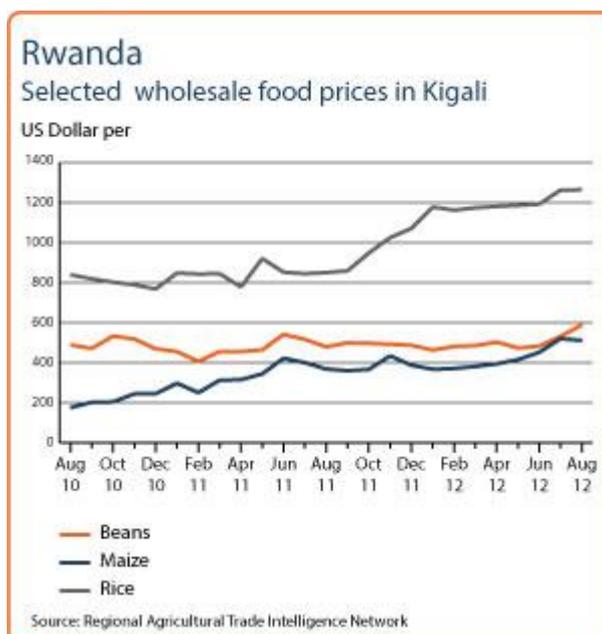
The country, which already hosts about 56 000 Congolese refugees, has received between April and August 2012 about 20 000 more people that fled from North Kivu region in the Democratic Republic of Congo. The new refugees are hosted in the Nkamira Transit Centre and in the Kigeme camp, with increasing needs for shelter, water and food.



Rwanda Cereal production

	2007-2011 average	2011	2012 forecast	change 2012/2011
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Others	72	92	103	12
Total	615	863	560	-35

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Source: FAO/GIEWS Country Cereal Balance Sheets



Reference Date: 30-July-2012

FOOD SECURITY SNAPSHOT

- Harvesting of the 2012 B season crops is almost complete
- Maize and rice prices remain at record levels
- Satisfactory food security conditions across the country

Favourable prospects for 2012 B season harvest

Harvesting of the 2012 B season crops is well advanced and production prospects are generally favourable. Following a delay of about 3 to 4 weeks to the onset of the rainy season, rainfall amounts were average to above average in April and May, improving soil moisture conditions and yields. Heavy rains in mid-April caused floods along riverbanks in some districts of Northern and Western provinces with damages to rice, beans and potatoes.

Rice and maize prices hit record levels

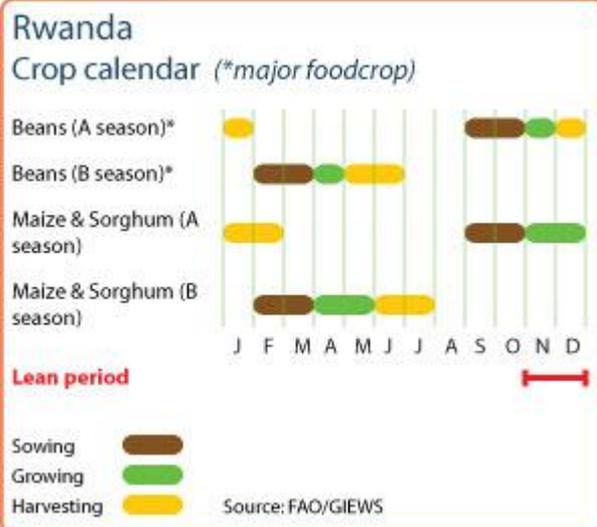
In Kigali, since the beginning of the year, wholesale prices of rice have remained steady at record high levels. In July 2012, rice prices reached USD 1 270 per tonne, about 50 percent higher than their levels of the previous year. On the other hand, maize prices have increased steadily since January 2012, registering a rise of about 32 percent to a record USD 484 per tonne in July 2012. Prices of beans increased by 11 percent during the last six months and are currently at the same level of one year ago.

Food security conditions generally stable, but high food prices remain a concern

Food security conditions are remaining favourable in most parts of the country with the arrival on markets of newly harvested crops of the 2012 B season. The situation has recently improved for subsistence farmers in highland areas whose access to food was limited by reduced labour opportunities at the beginning of the 2012 B season due to delayed rains. For these farmers a significant portion of their wage income is derived from working on better-off farms.

By contrast, the rising market prices are eroding households' purchasing power, particularly impacting vulnerable and low-income households, given their high reliance on markets.

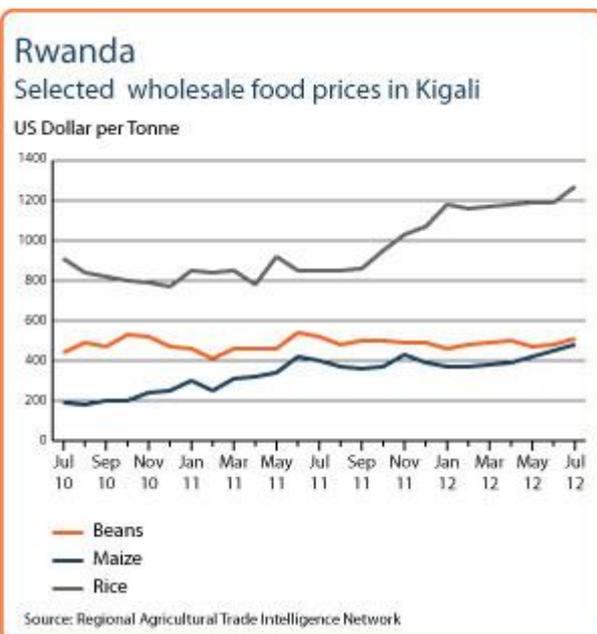
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Rwanda Cereal production

	2006-2010 average	2010	2011 estimate	change 2011/2010
	000 tonnes		percent	
Maize	218	441	526	19
Sorghum	168	163	152	-7
Rice (paddy)	74	67	81	21
Others	60	92	97	5
Total	520	763	856	12

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



Reference Date: 07-May-2012

FOOD SECURITY SNAPSHOT

- Heavy rains in April cause localised flooding
- Earlier, poor rains in February and March affected planting of the 2012 B season crops
- Increased crop production registered in the earlier 2012 A season
- Rice prices continue to strengthen

Heavy rains in April cause localised flooding

Harvesting of the 2012 B season crops is underway and is expected to be completed in July. Poor rains characterised much of the planting period in February and March, resulting in rainfall deficits across most of the country. This was followed by a period of intense rainfall in mid-April causing flooding in some districts in the Northern and Western provinces, affecting an estimated 11 000 people (Rwandan Red Cross Society) and damaging some cropped fields. Although, the full extent of the flood damage on the agricultural sector is not yet known, yields may be negatively affected in areas that experienced excessive rains. However, the heavier rains have also helped reduce the seasonal water deficits in parts.

Overall, production prospects remain uncertain given the generally erratic weather conditions so far in the 2012 B season.

Increased output for 2012 A season

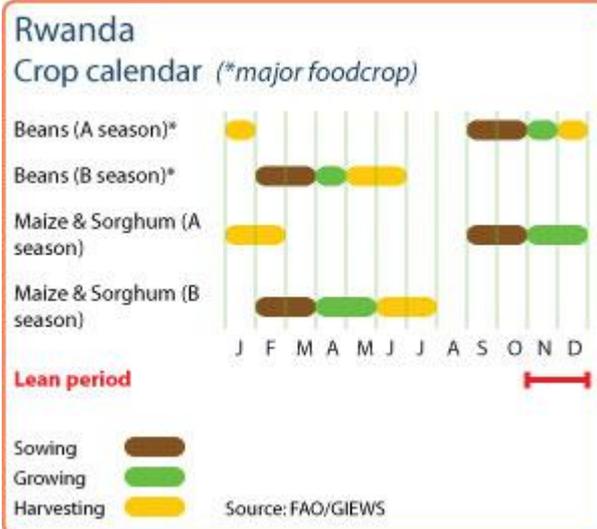
Harvesting of the 2012 A season's food crops was completed in February 2012. Continued support from the government's agriculture programme and beneficial rains during the growing season (October-December) supported a larger cereal output, estimated at about 460 000 tonnes, some 13 percent higher compared to the corresponding season in 2011. Maize production increased by 19 percent to over 400 000 tonnes, but wheat production declined by 71 percent, on account of reduced yields and plantings. Sorghum production grew by 58 percent and the rice output increased by 7 percent. Pulses and tuber production also registered increases.

Rice prices continue to increase

In Kigali, monthly prices of rice continued to increase, despite a slight drop in February coinciding with the harvest of the 2012 A season's crop. In April 2012, at USD 1.25 per kg, rice prices were 62 percent higher than their levels of the previous year. Maize and bean prices have exhibited more stable trends, remaining relatively firm since mid-2011; however, in April prices increased by 2 and 9 percent respectively.

Food security conditions generally stable, but high food prices remain a concern

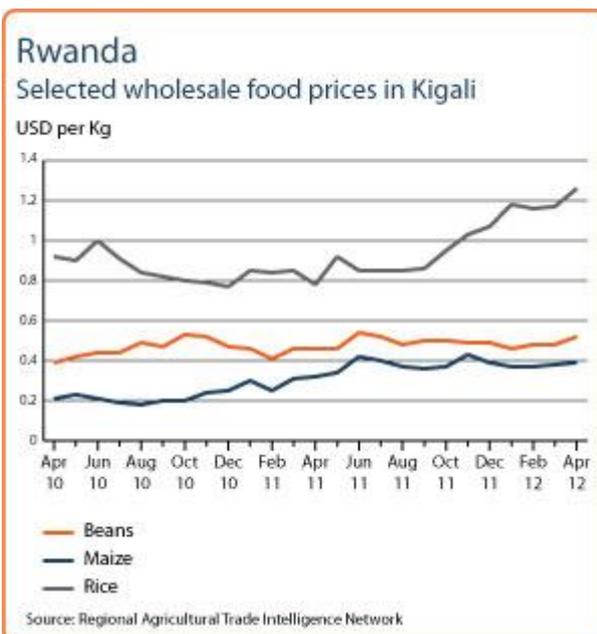
Food security conditions remain stable owing to the good production in 2011 and early 2012. New supplies from the 2012 B harvest are expected to enable households to replenish food stocks and supplement market supplies. However, the current high market prices are expected to erode households' purchasing power, particularly impacting vulnerable and low-income households, given their high reliance on markets. On



Rwanda Cereal production

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average, market supplies contribute about 52 percent to total annual household food consumption (CFSVA 2009). In addition, irregular rains and localised flooding during the 2012 B season may result in production short-falls, which could limit food availability, negatively impacting on food security conditions in the second half of 2012.

Reference Date: 14-March-2012

FOOD SECURITY SNAPSHOT

- Below-average rains recorded at the start of the 2012 B agricultural season
- Favourable production forecast for the 2012 A season
- Higher food prices persist

Below normal rainfall during 2012 B planting period

Land preparation and planting for the 2012 B season (February-July) is underway. Most of the country experienced poor rains at the start of the season in February and the first dekad of March, though some areas in the west received normal rains. Rainfall forecasts for the March-May period indicate an increased likelihood of normal to below normal rainfall, which could impact production for the 2012 B season.

Good harvest estimated for 2012 A season

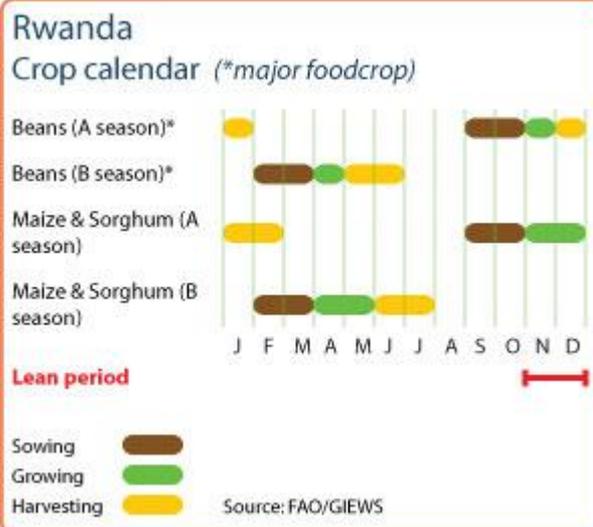
Harvesting of the 2012 A season was completed in February. Although official estimates are not yet available, the season's output is expected to be above the good harvest of the previous year, as a result of continued support from the government's agriculture programme and beneficial rains during the growing season (October-December).

Rice prices increase, but maize and bean prices remain stable at high levels

In Kigali, monthly prices of rice, which have been rising since September 2011, were about 40 percent higher in February 2012 than their levels of the previous year. Maize and bean prices are similarly higher than last year, but remained relatively firm since the mid-2011, having increased in early 2011. The higher prices are reflected in the cereal and bread sub-index of the national CPI, which recorded a year-on-year rise of about 18 percent in February 2012.

Satisfactory national supplies help to stabilise food security conditions

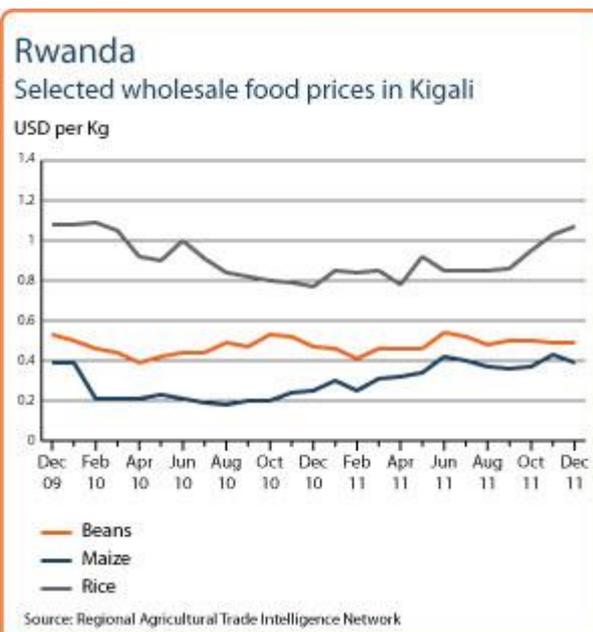
Food security conditions remain stable owing to the good production in 2011. New supplies from the 2012 A harvest are expected to further improve conditions, as households replenish food stocks and market supplies are augmented. However, the current high market prices are expected to erode households' purchasing power, particularly impacting vulnerable and low-income households, given their high reliance on markets. On average, market supplies contribute about 52 percent to total annual household food consumption (CFSVA 2009).



Rwanda Cereal production

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



Reference Date: 10-January-2012

FOOD SECURITY SNAPSHOT

- Favourable production prospects following good rains throughout the 2012 A agricultural season
- Cereal production in 2011 higher than previous year, supported by larger plantings
- Stable but high prices of maize and rice persist

Good crop prospects for 2012 A season

Harvesting of the 2012 A season's crop is well underway. Rainfall levels have been above average across much of the country during the main cropping period (September-December), benefiting crop development. As a result, production is expected to be similar or above the previous year's good crop.

Increased cereal production realised in 2011

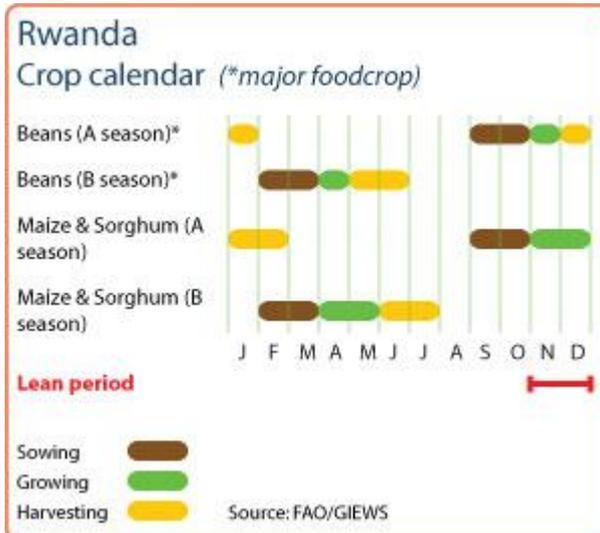
Aggregate cereal production in 2011 is estimated at 856 000 tonnes, 12 percent higher than in 2010. Maize and rice production registered the largest increases. Following erratic rains during the 2011 A season, precipitation levels improved for the 2011 B season across much of the country contributing to the increase in production.

Relatively stable but high maize prices observed in Kigali

In Kigali, monthly prices of maize and rice in December 2011 were about 60 and 40 percent above their levels of the previous year. The higher prices are reflected in an increase in the cereal and bread sub-index of the national CPI, which recorded a year-on-year rise of about 21 percent in November 2011. Bean prices, by contrast, which remained steady since August 2011, are at comparable levels to the previous year.

Satisfactory national supplies help to stabilise food security conditions

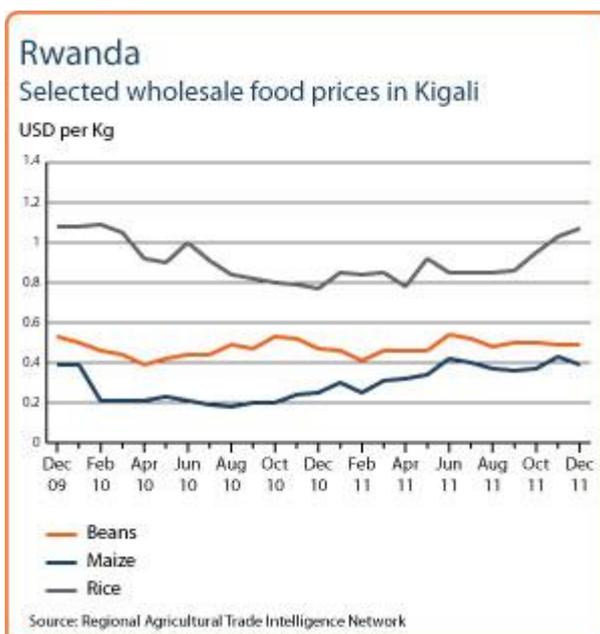
Food security conditions remain stable owing to the good production in 2011. New supplies from the 2012 A harvest are expected to further improve conditions, as households are able replenish food stocks and market supplies are augmented. However, the current high market prices are expected to erode households' purchasing power, particularly impacting vulnerable and low-income households, given their high reliance on markets. On average, market supplies contribute about 52 percent to total annual household food consumption (CFSVA 2009).



Rwanda
Cereal production

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Others	60	92	97	5
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Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Reference Date: 15-November-2011

FOOD SECURITY SNAPSHOT

- Favourable rains recorded during the start of the 2012 A season
- Expansion in cultivated area and good weather support improved 2011 B production
- Prices of maize and beans remain stable in recent months

Good rains received at start of 2012 A season

Planting of the 2012 A season's crops was completed in October, and benefited from favourable rainfall at the start of the current agricultural season (September-February). Rainfall forecasts point to a continuation of good rains until December 2011 across much of the country, except south-western regions where reduced rains are forecast.

Cereal production increases in 2011

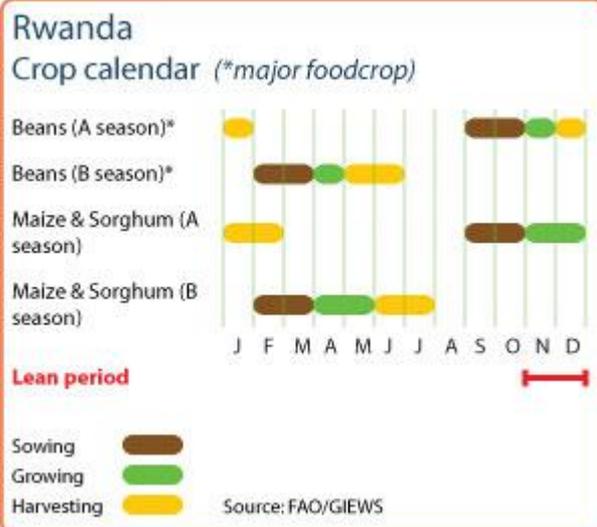
Overall, aggregate cereal production for 2011 is estimated at 856 000 tonnes, 12 percent higher than in 2010. Maize and rice production registered the largest increases. Following erratic rains during the earlier 2011 A season (September 2010 to February 2011), precipitation levels improved for the 2011 B season across much of the country; however towards the harvesting period, much of the country experienced heavy rains that negatively impacted on harvesting activities.

Relatively stable maize and bean prices observed in Kigali

The cereal and bread sub-index of the national CPI declined marginally between July (end of the 2011 B harvest) and October 2011, but remains over 20 percent higher than last year's level. Individual crop prices in Kigali have displayed similar trends over the last months, with the exception of rice, which has increased by 12 percent during the same period. The improved production levels this year, particularly of maize, have contributed to the decline. However, prices of rice and maize still remain above last year's low levels by 18 and 80 percent respectively.

Satisfactory national supplies help to stabilise food security conditions

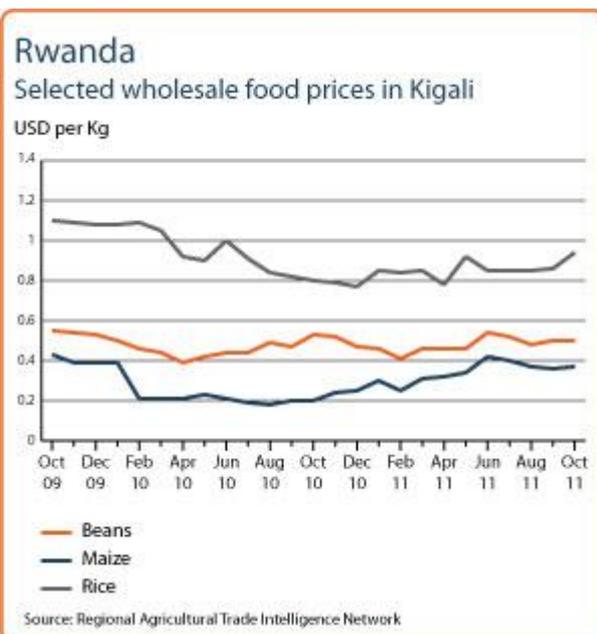
Food security conditions remain stable owing to the good production in 2011. However, as households' stocks dwindle, market purchases will become the main source of food supplies, contributing, on average, about 52 percent of total annual household food consumption (CFSVA 2009). Despite the recent decline, the higher price of some food crops and reliance on markets is expected to aggravate the food insecurity conditions of vulnerable and low-income households over the next months.



Rwanda Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes		percent	
Maize	218	441	526	19
Sorghum	168	163	152	-7
Rice (paddy)	74	67	81	21
Others	60	92	97	5
Total	520	763	856	12

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



Reference Date: 15-September-2011

FOOD SECURITY SNAPSHOT

- Favourable rains support improved 2011 B season harvest
- Despite erratic rains during the earlier 2011 A season, estimates indicate similar production to last year
- Prices of maize and beans strengthen during the first half of 2011, but decline in August

Improved rains support good 2011 B production

Harvesting of the 2011 B season was completed in July and preliminary estimates point to an improved harvest. Following erratic rains during the earlier 2011 A season (September to February), precipitation levels improved for the 2011 B season across much of the country, with higher rainfall amounts observed in eastern parts, while slight deficits were recorded in western portions of the country during April. Towards the harvesting period, much of the country experienced increased rainfall levels that impacted harvesting activities; however, concurrently, this also improved water availability for the minor C season's crops that are produced in marshland and low-lying land. Total cereal production for the 2011 B season is estimated at 441 000 tonnes, approximately 30 percent higher than last year's output. Overall, aggregate production for 2011 (not including the minor C season) is estimated at 856 000 tonnes, with maize and rice production registering the largest increases compared to 2010.

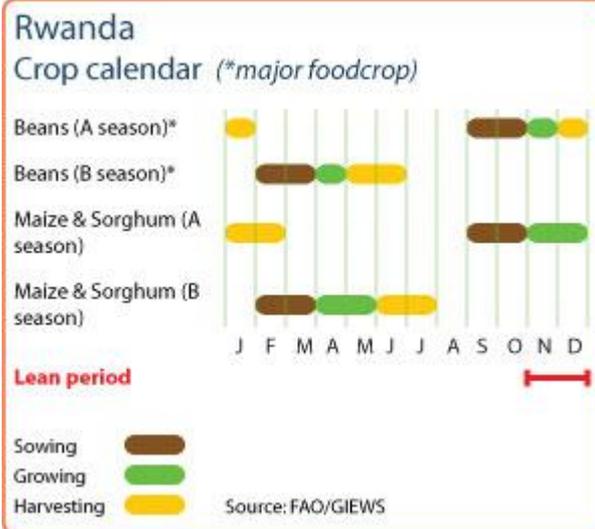
Land preparation and planting for the 2012 A season began in August/September. Rainfall forecasts point to increased likelihood of normal to above normal rainfall between September and December 2011, corresponding the beginning of the A season, in much of the country, apart from south-western regions where reduced rains are forecast.

Favourable maize supplies push prices down

Despite a temporary decline in February, reflecting new supplies from the 2011 A harvest, maize prices increased between March and July. Similarly, wholesale prices of beans (in US dollar terms) in Kigali have risen over the same period and were 23 percent up on their levels of July 2010. During August, prices of both commodities fell in response to improved market supplies from the just completed 2011 B harvest, but whereas bean prices were at a comparable level to last year, maize prices remain more than double their levels of 2010 for the same month.

New supplies from harvest 2011 B season help to stabilise food security conditions

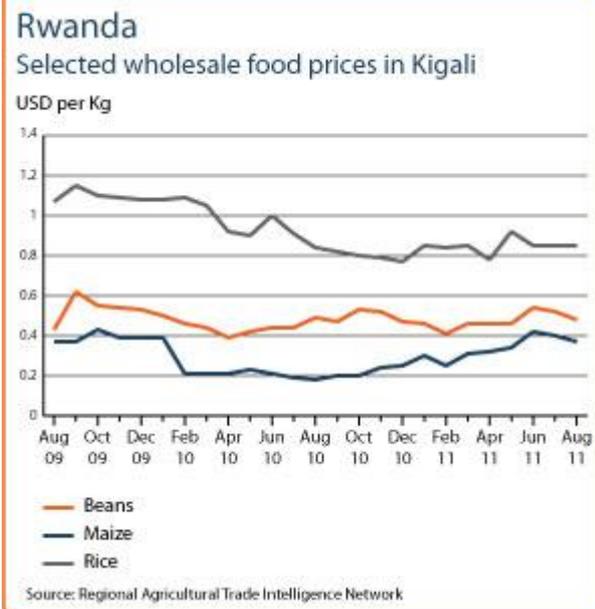
Food security conditions are anticipated to remain stable in the immediate period, as households replenish and augment their food stocks with supplies from the recent 2011 B harvest. However, given the small landholdings, households' stocks from own production are expected to last two to three months from August, with market purchases contributing, on average, about 52 percent to total household food consumption (CFSVA 2009). The higher prices of some food crops and reliance on markets is expected to aggravate the food insecurity conditions of vulnerable and low-income households as the lean season approaches towards the end of the year.



Rwanda Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
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Maize	218	441	526	19
Sorghum	168	163	152	-7
Rice (paddy)	74	67	81	21
Others	60	92	97	5
Total	520	763	856	12

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



Reference Date: 02-August-2011

FOOD SECURITY SNAPSHOT

- Favourable rainfall supports 2011 B season's crops
- Despite erratic rains during the 2011 A season, estimates indicate increased production compared to last year
- Prices of maize and beans strengthen during the first half of 2011

Improved rains support 2011 B crop production

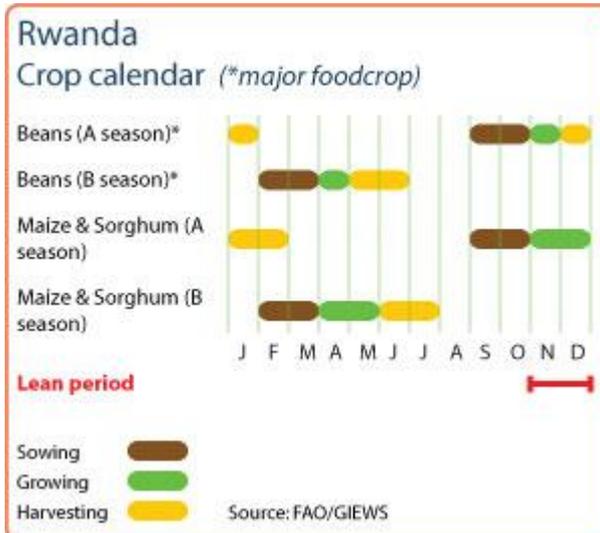
Harvesting of the 2011 B season is almost complete, with national production estimates anticipated to be above average. Following the erratic rains during the earlier 2011 A season (September to February), precipitation levels improved for the 2011 B season across much of the country, with higher rainfall amounts observed in eastern parts, while slight deficits were recorded in western portions of the country during April. Towards the harvesting period, much of the country experienced increased rainfall levels that may have had an impact on harvesting activities. As in previous seasons, farmers were provided with seeds and fertilisers at a subsidised rate as a means to improve crop productivity through the government's Crop Intensification Programme (CIP). Overall, current indications point to favourable crop production for 2011; however, official production figures are not yet available. Planting of the 2012 A crops is scheduled to begin in the following months.

Estimates indicate good 2011 A harvest, despite erratic rains

Harvesting of the 2011 A season was completed earlier in the year. With the exception of a period of favourable rainfall at the start of September and abundant rains at the beginning of November, precipitation levels were generally erratic during the short-rainy season. Despite the irregular precipitation, overall, food crop production is estimated to have increased by 5.4 percent relative to the output of the corresponding season in 2010. Favourable harvests for cereals and roots and tubers contributed to the increase and helped to compensate for lower bean production. Cereal production is estimated at about 430 000 tonnes for season A, primarily on account of an expansion in the area planted, with yield levels comparable to previous season. Production gains, in addition, were supported by government assistance through the CIP and a newly launched the Land Husbandry, Water Harvesting and Hillside Irrigation project (LWH) to promote increased productivity of high-value export crops.

Maize and bean prices increase during the first half of 2011

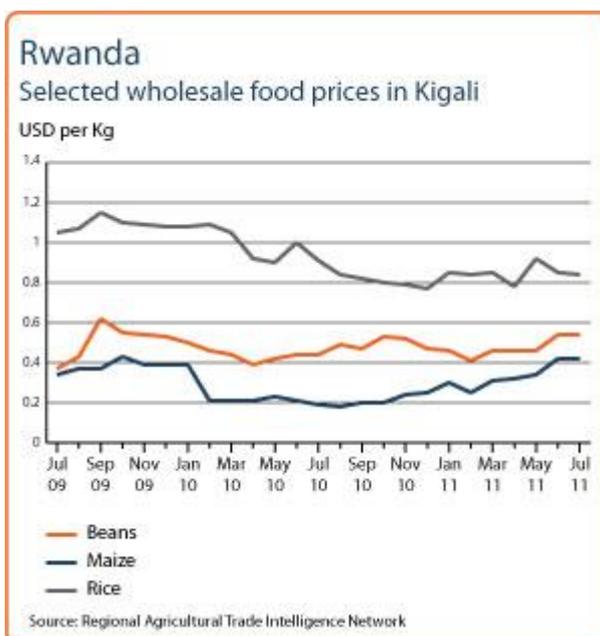
Despite a temporary decline in February, reflecting new supplies from the 2011 A harvest, maize prices increased between March and July, and are currently more than double their levels in the same month during 2010. Similarly, wholesale prices of beans (in US dollar terms) in Kigali have risen over the same period, but are only 23 percent up on their levels of July 2010. However, rice prices fell in both June and July and are 8 percent below the level last year. Overall, year-on-year food inflation in June was put at 6 percent, primarily attributable to increasing costs of cereals. New supplies from the recent harvest are expected to exert



Rwanda Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes		percent	
Maize	218	441	460	4
Sorghum	168	163	155	-5
Rice (paddy)	74	67	81	21
Others	174	169	161	-5
Total	520	763	794	4

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



some downward pressure on prices in the immediate period.

New supplies from harvest 2011 B season are expected to stabilise food security conditions

Food security conditions are anticipated to remain stable until the last quarter of 2011, as households replenish their food stocks with supplies from the recent 2011 B harvest. However, given the small landholdings, households' stocks from own production are expected to last two to three months, with market purchases contributing, on average, about 52 percent to total household food consumption (CFSVA 2009). The higher prices of some food crops and reliance on markets is expected to aggravate the food insecurity conditions of vulnerable and low-income households as the lean season approaches.

Reference Date: 20-May-2011

FOOD SECURITY SNAPSHOT

- Favourable rainfall improves prospects for 2011 B season's crops
- Erratic rains during the short-rainy season affected the minor 2011 A season crops
- Prices decline at the beginning of the year, but strengthen in the last few months

Favourable prospects for 2011 B season crops due to good rains

Harvesting of the 2011 B season (February to July) crop is currently underway. Following erratic rainfall during the earlier 2011 A season (September to February), precipitation levels improved for the 2011 B season across much of the country, with higher rainfall amounts observed in eastern parts. As in previous seasons, farmers were provided with seeds and fertiliser at a subsidised rate as a means to improve crop productivity, through the government's Crop Intensification Programme (CIP). Overall, current indications point to a favourable output for the B season crops.

Erratic rains affect 2011 A season's crop

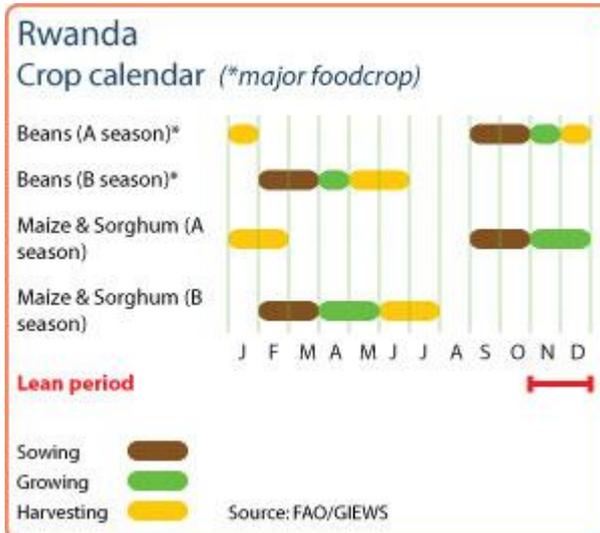
Harvesting of the minor 2011 A season was completed earlier in the year. With the exception of a period of favourable rainfall at the start of September and abundant rains at the beginning of November, precipitation levels were erratic during the short-rainy season. Crop production for the minor season is estimated to be similar or slightly below the output of the previous corresponding season. Prior to the start of the season the government launched the Land Husbandry, Water Harvesting and Hillside Irrigation project (LWH) to promote increased productivity of high-value export crops and also distributed 8 000 tonnes of seed through the CIP.

Rice prices decline, while bean and maize prices remain stable

Despite a temporary decline at the beginning of 2011 following new supplies from the 2011 A harvest, both bean and maize prices rose in March and remained steady through to May, reflecting the lower than expected production from the A season crops. Wholesale prices (in US dollar terms) of maize and beans in May 2011 are 40 and 10 percent above their levels in 2010 respectively. By contrast, rice prices have been declining since mid-2010 and reached their lowest level at the beginning of May at USD 759 per tonne, 16 percent below levels in May 2010.

Food security conditions improved, but refugees continue to need food assistance

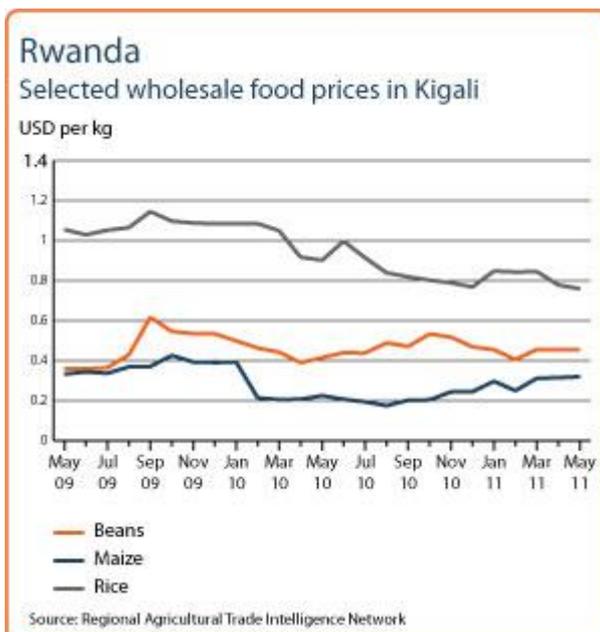
Food security conditions improved significantly in 2010 due to the second consecutive bumper harvest. However, a large number of refugees, mostly from the Democratic Republic of Congo, continue to reside in camps in Rwanda and require food assistance. Given the expected long duration of their stay, a Protracted Relief and Recovery Operation (PRRO) is being implemented to provide emergency food relief and help



Rwanda Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Sorghum	181	180	163	-9
Maize	149	287	441	54
Rice (paddy)	73	95	67	-29
Others	46	78	92	18
Total	450	640	763	19

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



improve nutrition and livelihoods of the most vulnerable groups, including both refugees and also Rwandan returnees. The higher prices of some food crops is also expected to aggravate the food insecurity conditions of vulnerable and low-income households, but the arrival of the new harvest may partly improve the situation.

Reference Date: 10-January-2010

FOOD SECURITY SNAPSHOT

- Erratic rains during the short-rainy season have affected the minor 2011A season crop
- But an overall good harvest in 2010, especially maize, has improved food security conditions and lowered food import needs
- Larger domestic supplies have contributed to lower staple food prices

Erratic rains impact 2011 minor season crops

Harvesting of the minor 2011A season is currently underway. With the exception of a period of favourable rainfall at the start of September and abundant rains at the beginning of November, precipitation levels have been erratic during the short-rainy season (September-November). The bean crop planted in late October and early November is reported to have been affected by the drier-than-normal conditions during the last dekad of November (precipitation levels were estimated to have been approximately one third of the long-term average), while heavy rains in December could have negatively impacted the early planted bean crops. In efforts to sustain agricultural growth, the government launched the Land Husbandry, Water Harvesting Hillside and Irrigation project (LWH), at the start of the 2011A season, to promote increased productivity of high-value export crops and also distributed 8 000 tonnes of seed through the Crop Intensification Programme (CIP).

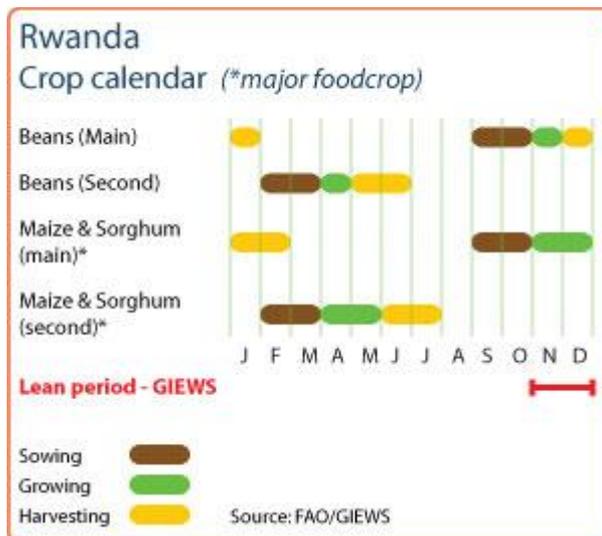
Large growth in 2010 harvest

The 2010 crop assessment indicated that there was a significant increase in total food production for the 2010B season. However, the production of pulses remained at a comparable level to last year, as the increase in bean yields was offset by a contraction in area planted. In regards to cereals, the 2010B maize harvest is estimated at 113 632 tonnes, 62 percent higher than in the previous year, attributed to a rise in yields and an expansion in acreage. In addition, the wheat harvest also increased; however, sorghum and rice production fell by 14 and 29 percent, respectively, compared to the corresponding season in 2009, reflecting a shift in acreage to maize and wheat. Overall, combining A, B and C seasons, total cereal production for 2010 is estimated at 763 000 tonnes, marking a substantial rise over the good output in 2009.

In addition, production of two key export crops, coffee and tea, expanded in 2010 by 23 and 11 percent, respectively, during the first nine months of 2010 compared to the same period in 2009. The growth of these cash crops is attributed to stronger international prices that attracted increased investment in the sector. By contrast, banana production decreased, as a result of the up-rooting of banana plantations that were infected by bacterial wilt, particularly in the Western Province.

Most staple food prices lower in December 2010 compared to one year earlier

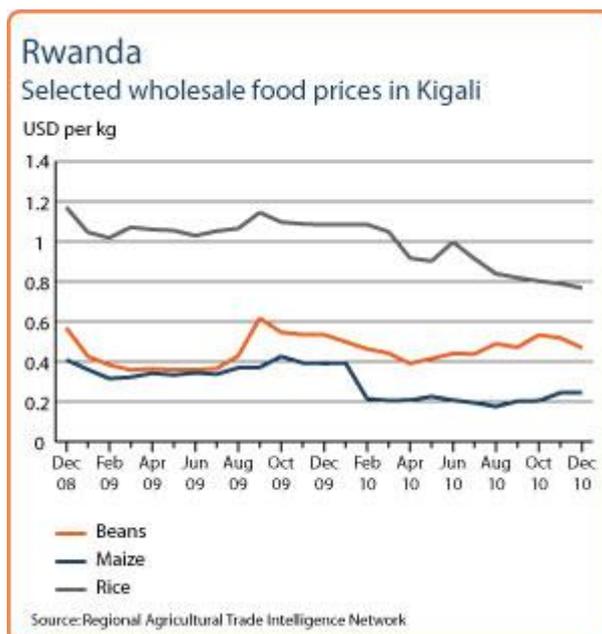
Improved crop production in 2010, and consequently an increase in



Rwanda Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Sorghum	181	180	163	-9
Maize	149	287	441	54
Rice (paddy)	73	95	67	-29
Others	46	78	92	18
Total	450	640	763	19

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



domestic supplies, has supported lower wholesale prices (US dollar terms) of most major staple foods throughout Rwanda. The average price of maize in 2010, for example, was approximately one third lower compared to 2009; however, maize prices have strengthened somewhat in recent months. Beans prices, that were on the rise since May, have declined in the last two months of 2010. Furthermore, in spite of the smaller rice harvest in 2010, prices have been declining since June and in December, at USD 768 per tonne; prices of rice were at their lowest level in the past two years.

Food security conditions improved, but refugees continue to need food assistance

Food security conditions improved significantly in 2010 due to the second consecutive bumper harvest. However, a large number of refugees, mostly from the Democratic Republic of Congo, continue to reside in camps in Rwanda and require food assistance. Given the expected long duration of their stay, a Protracted Relief and Recovery Operation (PRRO) is being implemented to provide emergency food relief and help improve nutrition and livelihoods of the most vulnerable groups, including both refugees and also Rwandan returnees.

Reference Date: 15-September-2010

FOOD SECURITY SNAPSHOT

- Substantial increase in 2010 crop production, with the cereal harvest reaching record highs
- Food security improved and food import needs are lower following a succession of good harvests
- Food prices have declined from their 2009 peaks across the country, due to increased market availability

Bumper cereal harvest for 2010

Planting of the cereal crops for minor 2011A season is currently underway in western Rwanda, while harvesting of the main 2010B crops was completed in July. A recently concluded crop assessment indicated that there was a significant increase in total food production for the 2010B season. Total 2010 cereal production for all seasons increased by 19 percent, while, similarly, roots and tuber production rose by 14 percent. The production of pulses remained at a comparable level to last year, as the increase in bean yields was off-set by a contraction in area planted. In the drought-prone zones of the Eastern Provinces heavy rains damaged some bean crops, but overall, rainfall for the season was average.

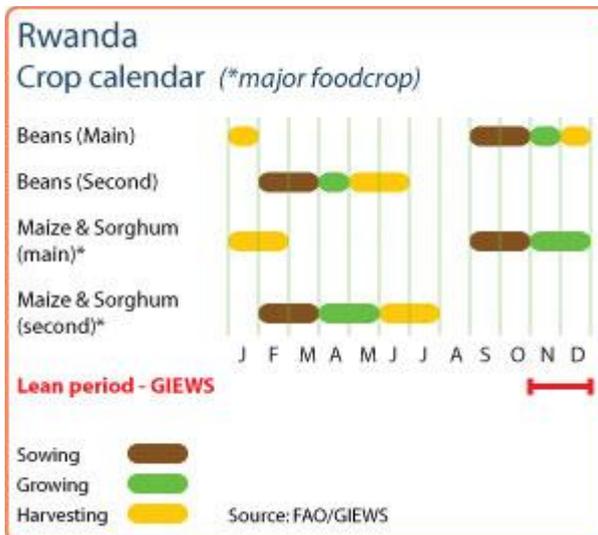
The Government's Crop Intensification Programme (CIP) supported an expansion in the area planted for maize for both the 2010 A and B seasons. In addition, the distribution of hybrid seeds and fertiliser, through auctions and voucher schemes, led to an increase in crop productivity, with average maize yields increasing to 1.85 tonnes per hectare for the 2010B season, up from 1.5 tonnes per hectare in the previous season. The 2010B maize harvest was estimated at 113 632 tonnes, 62 percent higher than one year earlier. In addition, the 2010B wheat harvest also increased; however, sorghum and rice production fell by 14 and 29 percent, respectively, compared to the corresponding season in 2009 reflecting a shift in acreage to maize and wheat.

Overall, combining both A, B and C seasons, total cereal production for 2010 is estimated at 763 000 tonnes. This marks a substantial rise over the good output in 2009.

Prices of staple food crops decline significantly from high levels at the end of 2009

As a result of more abundant supply situation, wholesale prices of all major staple foods are lower than the previous year throughout Rwanda. In Kigali, for example, the prices of rice and maize (US dollar terms) have decline between September/October 2009 and August 2010 by 28 and 59 percent, respectively. Beans prices have also fallen from their 2009 peaks but have risen somewhat in recent months.

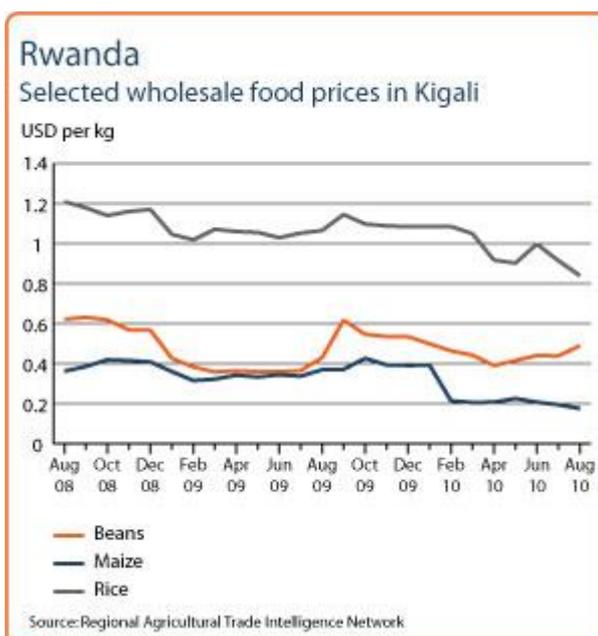
Increased crop production is expected to lead to a reduction in cereal imports for 2010. The recent implementation of the East African Community (EAC) common market protocol on 1 July 2010, which permits the free movement of goods, may facilitate greater regional trade in agricultural produce.



Rwanda Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Sorghum	181	180	163	-9
Maize	149	287	441	54
Rice (paddy)	73	95	67	-29
Others	46	78	92	18
Total	450	640	763	19

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



Refugees in need of food assistance

Owing to the bumper harvest, food security levels have improved. However, a large number of refugees from mostly from the Democratic Republic of Congo continue to reside in camps in Rwanda and require food assistance. Given the expected long duration of their stay, a Protracted Relief and Recovery Operation (PRRO) has been set-up to provide emergency food relief and help improve nutrition and livelihood of the most vulnerable groups, including both refugees and also Rwandan returnees.

Reference Date: 25-March-2010

FOOD SECURITY SNAPSHOT

- 2010A season crop much larger than last year
- Food security improved and food import need lower following a succession of good harvests
- Wholesale cereal and beans prices have declined in recent months

2010 A season crop better than last year

Contrary to earlier expectations, despite an uneven rainfall season in several areas, preliminary data from the Ministry of Agriculture (MINAGRI) crop assessment indicate that the 2010A cereal and beans production, harvested at the beginning of the year was better than the same season in 2009. Cereal production increased by 26 percent and pulses by 19 percent. By contrast there was a small decline by 3 percent in the production of tubers and bananas.

Plantings of the 2010B crops (about 50 percent of total) have benefited from above average rainfall so far. A production assessment will be conducted at harvest time in June.

Food security favourable due to a succession of good harvests since 2008

As a result of favourable weather and the Government's Crop Intensification Programme (CIP), production in 2009 was a record for many crops marking a second successive year of increased production. According to a report by the Rwanda Development Authority (RADA), maize production doubled in 2009 compared to the previous year, and cassava, Irish potatoes, rice and wheat increased by 55, 11, 16 and 7 percent respectively. Production of other basic foodcrops, mainly bananas, roots and tubers, was also good.

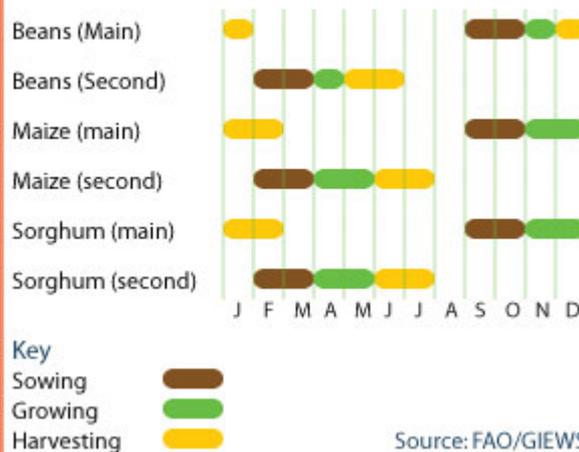
With the good output of the first crop for 2010 (A crop) and assuming that the 2010 B crop early good prospects materialize, a further improvement in the food security situation is likely in 2010.

The CIP programme began in 2007 with the objective of boosting agricultural production and food security and to reduce dependence on food imports. Cereal import requirements for 2009 are estimated by FAO to have fallen to about 127 000 tonnes, or 20 percent below the already reduced 2008 imports and are likely to be reduced further in 2010.

Prices of staple food crops decline

As a result of the larger availabilities, wholesale prices of maize, rice and beans have declined in recent months. For example, in March the price of maize in Kigali's central market was USD 211/tonne, 76 percent below the level of September and 52 percent below the price recorded a year earlier. Similarly, beans fell to around USD 455 /tonne in March, 35 percent below September level but remained above a year earlier levels. Rice prices fell less and in March they were 6 percent below September.

Crop calendar Rwanda



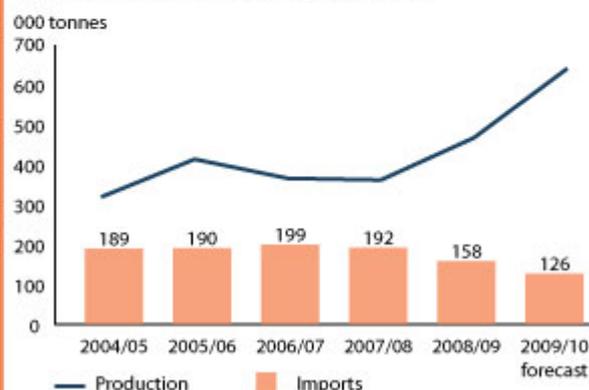
Rwanda

Cereal production

	2004-2008 average	2008	2009 estimate	change 2009/2008
	000 tonnes			percent
Sorghum	178	144	180	25
Maize	109	167	287	72
Rice (paddy)	63	82	95	16
Others	35	74	78	5
Total	385	467	640	37

Note: percentage change calculated from unrounded data.

Total cereal production and imports

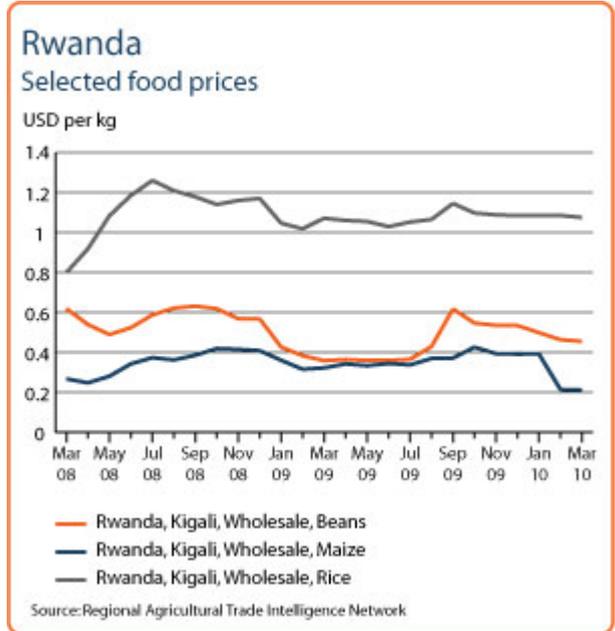


Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.

Source: FAO/GIEWS Country Cereal Balance Sheets

Refugees in need of food assistance

According to WFP about 45 000 refugees, mostly from Democratic Republic of Congo, continue to reside in camps in Rwanda. Given the expected long duration of the stay of these refugees, a Protracted Relief and Recovery Operation (PRRO) has been set up to provide emergency food relief and help improve nutrition and livelihood of the most vulnerable groups.



Reference Date: 11-January-2010

FOOD SECURITY SNAPSHOT

- Prospects for first season 2010A crops unfavourable
- Record cereal and other crops harvested in 2009. Food security improved and food import need lower
- Wholesale cereal and beans prices have declined in recent months

Prospects for 2010 A season crops unfavourable

Abundant rains in October and early November favoured planting of the secondary 2010A season crops (30 to 40 percent of total). However a sharp reduction of precipitation from mid-November through the second dekad of December has stressed beans and maize crops being harvested in the drought prone areas of Southern and Eastern Provinces. Bean crops planted in September in these provinces were not affected and have been already harvested. In the Western and Northern Provinces, the rainy season was normal and a normal harvest is expected. Overall production of the beans and cereal A season crops is expected to be below normal. A quantitative crop assessment is planned by Government for late January.

Record crop production in 2009

As a result of favourable weather and the Government's Crop Intensification Programme (CIP), production in 2009 was a record for many crops marking a second successive year of increased production. According to a newly released report by the Rwanda Development Authority (RADA), maize production doubled compared to the previous year, and cassava, Irish potatoes, rice and wheat increased by 55, 11, 16 and 7 percent respectively. Production of other basic foodcrops, mainly bananas, roots and tubers, was also good.

The CIP programme began in 2007 with the objective of boosting agricultural production and food security and to reduce dependence on food imports. Cereal import requirements for 2009 are estimated by FAO to have fallen to about 127 000 tonnes, or 20 percent below the already reduced 2008 imports.

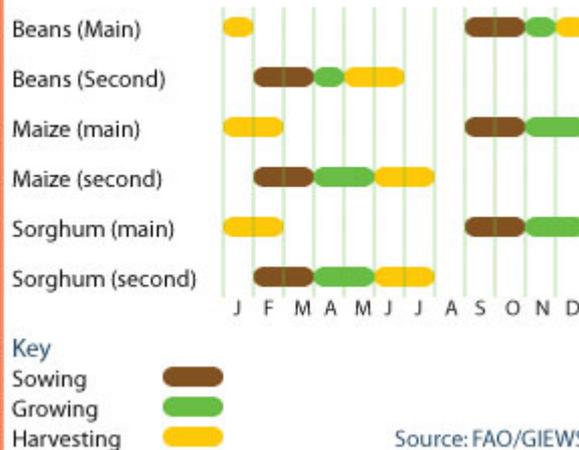
Prices of staple food crops decline

As a result of the larger availabilities of supplies from the 2009B crop, wholesale prices of maize, rice and beans have declined in recent months. For example, in December 2009 the price of maize in Kigali's central market was USD 391/tonne, 9 percent below the level of October and 4 percent below the price recorded a year earlier. Similarly, beans fell to around USD 1084/tonne in December 2009, 13 percent below September's level and 6 lower than a year ago. Rice prices fell also in line with other products and in December were 7 percent below a year earlier.

Refugees in need of food assistance

According to WFP about 45 000 refugees, mostly from Democratic Republic of Congo, continue to reside in camps in Rwanda. Given the expected long duration of the stay of these refugees a Protracted Relief and Recovery Operation (PRRO) has been set up to provide

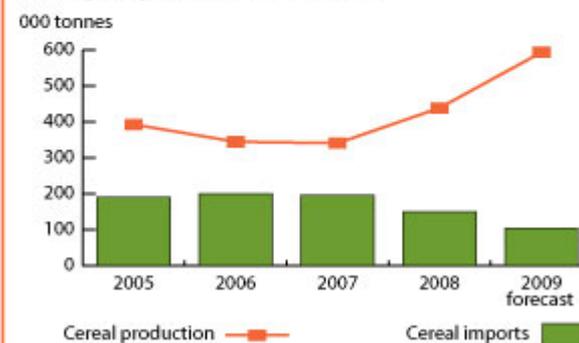
Crop calendar Rwanda



Rwanda Cereal production and imports

Cereal production	2004-2008	2008	2009	change*
	average		forecast	2009/2008
	000 tonnes		percent	
Sorghum	178	144	180	24.6%
Maize	109	167	287	71.9%
Rice (milled)	42	54	49	-9.8%
Other	24	74	78	6.3%
Total Cereals	364	439	594	35.3%

* Percentage change calculated from unrounded data.



Source: FAO/GIEWS Country Cereal Balance Sheets

emergency food relief and help improve nutrition and livelihood of the most vulnerable groups.



Reference Date: 09-September-2009

FOOD SECURITY SNAPSHOT

- Good rains result in a bumper harvest for 2009B season
- Declining, but above average, cereal prices recorded in Kigali

Good rains result in a bumper harvest for 2009B season

Planting of the cereal crops for secondary 2010A season is currently underway in western Rwanda, while harvesting of the main season (2009B) crops was completed in July. The rainfall this year was normal to above normal with heavy downpours in February causing flooding in some areas of the country. Heavy rains recorded in May also lead to production losses for beans and water-sensitive pulses. Overall, however, total cereal production for the 2009B season increased by 34 percent relative to 2008, owing to abundant and well distributed rains, coupled with improved use of inputs through the Crop Intensification Program. Total aggregate cereal output for 2009 (A and B cropping seasons) is estimated to be about 445 000 tonnes. On average, the main season (B) accounts for approximately 60 to 70 percent of annual cereal production, but its relative contribution have been decreasing over the years. Cereal import requirements for 2009 are forecast at 170 000 tonnes, or 16 percent more than the estimated 2008 imports. Production of the other food crops in the 2009B season, mainly bananas, roots and tubers, was also good.

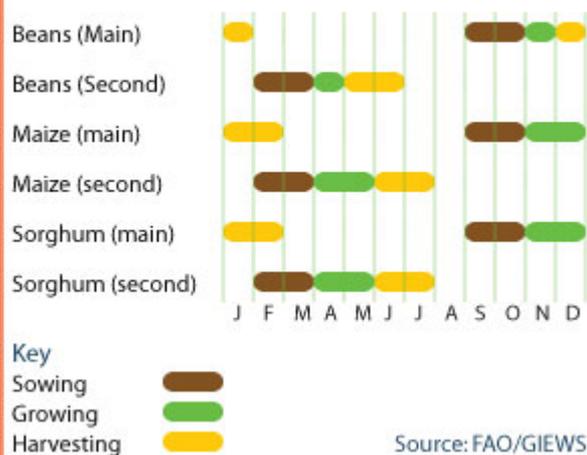
Prices of staple cereals remain high

Prices of maize, rice and beans have roughly followed a similar pattern, having declined recently but remaining higher than their customary levels during much of 2007. For example, in September 2009 the price of maize in Kigali's central market declined to USD 355/tonne, but was still 40 percent above the price recorded in 2007 for the same month. Similarly, the price of rice came down to around USD 1135/tonne in September 2009 since peaking in July 2008 at USD 1260/tonne. However, rice prices are still significantly higher than the level of USD 750/tonne during much of 2007.

Refugees in need of food assistance

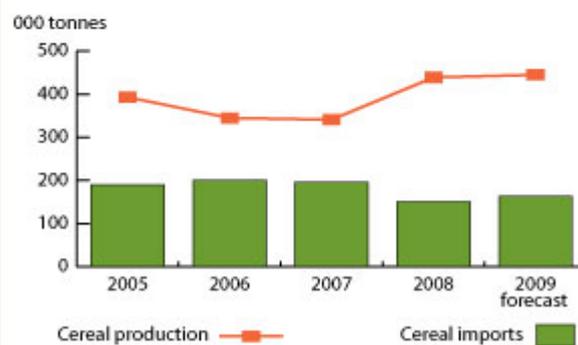
According to WFP about 45 000 refugees, mostly from Democratic Republic of Congo, continue to reside in camps in Rwanda. Given the expected long duration of the stay of these refugees a PRRO has been set up to provide emergency food relief and help improve nutrition and livelihood of the most vulnerable groups.

Crop calendar Rwanda



Cereal production and imports Rwanda

Cereal production	2004-2008	2008	2009	change
	average		forecast	
	000 tonnes		percent	
Sorghum	178	144	180	25%
Maize	109	167	160	-4.2%
Rice (milled)	42	54	49	-9.3%
Other	24	74	56	-24.3%
Total Cereals	364	439	445	1.4%



Source: FAO/GIEWS Country Cereal Balance Sheets