



GIEWS Country Brief Madagascar

Reference Date: 06-June-2019

FOOD SECURITY SNAPSHOT

- Generally favourable weather conditions expected to result in larger paddy harvest in 2019, but output forecast to remain below average
- Imports of rice in 2019/20 marketing year foreseen to remain unchanged on yearly basis, enabling the country to buffer national availabilities and replenish stocks
- Prices of rice declined between January and May 2019, weighed down by good first season harvest and favourable production prospects for main season's output
- Small production increases in vulnerable southern provinces expected to help stabilize food security conditions that, however, still remain serious concern

Paddy production forecast to rise in 2019

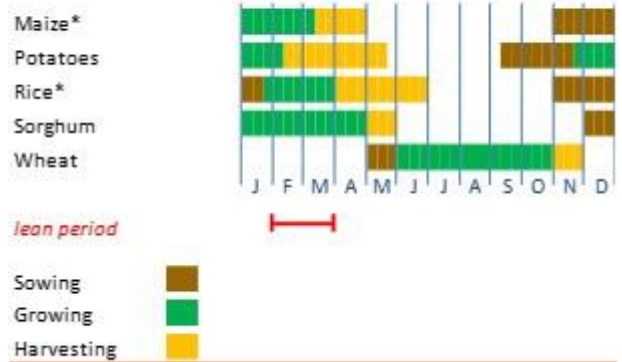
Harvesting of the 2019 main season paddy crop is underway and is expected to conclude in early July.

Rains were generally satisfactory over most of the country since the start of the cropping season in October 2018, positively impacting the production outlook for the 2019 cereal crop. Reflecting the rainfall patterns, vegetation conditions, based on remote sensing analysis, were mostly favourable in May in the main paddy-producing regions in the centre, inferring a likely increase in yields and the area harvested. In addition, in the southern regions, near-normal rainfall volumes, although unevenly distributed temporally, are anticipated to cause a minor increase in cereal production, following successive years of sharply reduced outputs. Infestations of Fall Armyworms were also reported to have caused yield losses in southern regions.

Overall, the national paddy production is expected to increase in 2019 for a second consecutive year and could reach a level close to the five-year average (2013-2017). However, underlying structural factors, including poor access to inputs, such as improved seed varieties and an inadequate irrigation system that continues to severely impede farmers' productive capacities, are expected to curtail the larger production gains.

Madagascar

Crop Calendar (*major foodcrop)



Source: FAO/GIEWS.

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Cereal Production

	2013-2017 average	2017	2018 estimate	change 2018/2017
	000 tonnes			percent
Rice (paddy)	3 645	3 101	3 328	7.3
Maize	335	281	215	-23.5
Wheat	5	5	5	0.0
Others	1	1	1	0.0
Total	3 986	3 388	3 549	4.8

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Import volumes likely to remain unchanged in 2019/20

Despite an expected increase in paddy production, the quantity of imported rice in the 2019/20 marketing year (April/March) is foreseen to remain unchanged on a yearly basis, as the country seeks to replenish stocks and buffer domestic availabilities following consecutive years of below average harvests. In the previous 2018/19 marketing year, rice imports were estimated at about 413 000 tonnes, an above average quantity but down from the high level of 730 000 tonnes imported in 2017/18 when domestic availabilities were significantly cut due to a sharp decline in paddy production.

Prices of rice declined, weighed by positive production prospects

Prices of rice, the main food staple, declined seasonally between January and May 2019, as new supplies from the first season harvest boosted market availabilities. Moreover, favourable production prospects for the main paddy harvest weighed on prices. Stable exchange rates and international prices have also contributed to easing pressure on prices of imported rice varieties.

Food security remains concern in southern regions

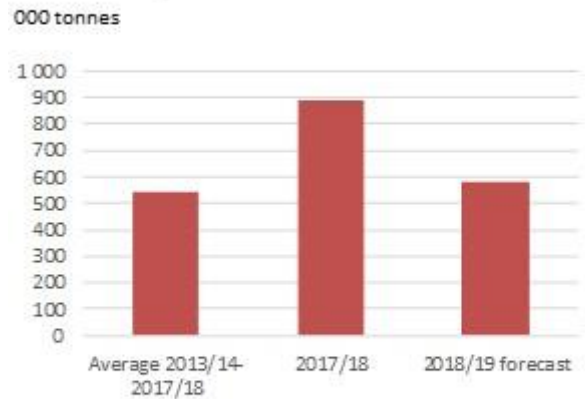
New supplies from the 2019 main harvest are expected to instigate seasonal improvements in food security conditions in the vulnerable southern regions of Androy and Anosy. Although the harvests in these areas are likely to be slightly higher than the previous year, they are still foreseen to remain well below average and consequently the prevalence of food insecurity is expected to remain high, compelling households to continue to adopt coping strategies.

During the first quarter of 2019, an estimated 0.5 million people in the two aforementioned regions were estimated to be food insecure, representing about 44 percent of the regions' population.

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Cereals Imports

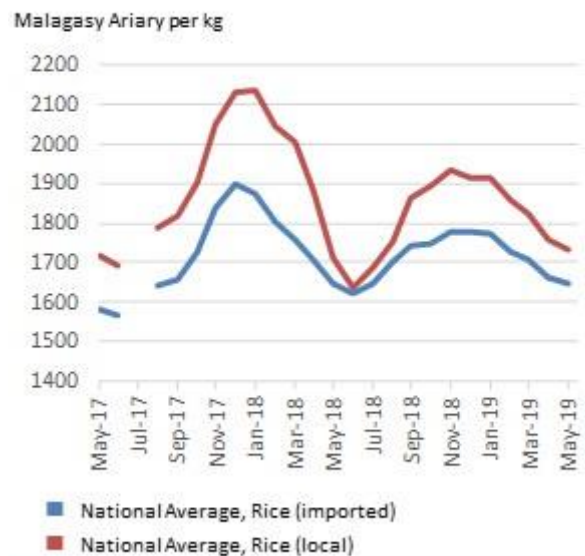


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Madagascar

Retail prices of rice



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