Cyclone Amphan severely affected agricultural sector in southwestern parts of country

Tropical Cyclone Amphan hit the southwestern parts of Bangladesh on 20 May 2020, causing devastation, loss of lives and severe damage to the agriculture and fisheries sectors. The Khulna and Borphal divisions were the most affected. Although assessments are still ongoing, preliminary official estimates indicate that about 265,000 hectares of cropped land, including rice, vegetables, jute, sesame, mangoes and maize, have been adversely affected. Severe losses of livestock, poultry and fisheries in the most affected areas were also reported.

Output of 2020 “Boro” paddy crop estimated at average level

Harvesting of the 2020 main “Boro” paddy crop, which accounts for about 55 percent of the annual output, was completed at the end of May. The area harvested is estimated close to the five-year average, but the lowest level since 2017, as low domestic prices induced farmers to shift paddy land to more remunerative crops, including maize, vegetables and tobacco. The average yields are estimated at a near-record level, supported by favourable weather conditions, adequate supplies of high yielding seed varieties and fertilizers. Localized damages to standing crops were reported in the southwestern areas, due to strong winds, heavy rains and floods triggered by the passage of the tropical Cyclone Amphan. According to the Government early assessments, the impact of the cyclone on standing “Boro” crops was minimal as the harvest in the affected areas was almost completed when the cyclone hit the country. It is officially estimated that about 47,000 hectares of “Boro” land was damaged, accounting for less than 1 percent of the total planted...
area. Overall, the production of the 2020 “Boro” paddy crop is estimated at an average level.

The bulk of the 2020 minor “Aus” paddy crop, accounting for about 10 percent of the total annual output, was planted between March and mid-May. Overall, weather conditions and irrigation water availability have been near average, supporting planting operations and early crop development. According to official information, Cyclone Amphan caused localized damages to “Aus” seedbeds, but farmers were able to replant most of the affected areas. Production prospects for the 2020 “Aus” paddy crop are generally favourable. The planted areas is forecast at an above-average level, mostly reflecting remunerative prices at planting time.

Planting of the 2020 “Aman” paddy crop, which accounts for 35 percent of the annual output, has just started and will continue until end-September. The area planted with the “Aman” crop is expected to remain at an above-average level, driven by the current strong market prices.

The 2020 main season maize crop is expected to be harvested by the end of July. The output is forecast at a record high level, reflecting an expansion in the area sown, driven by robust demand from the feed industry and expectations of bumper yields as farmers increased the use of high-yielding seed varieties. The 2020 secondary season maize crop will be planted towards the end of the year.

The production of the 2020 winter wheat crop, harvested in April, is officially estimated at 1.25 million tonnes, close to the five-year average.

### Cereal imports in 2020/21 forecast close to five-year average

Wheat import requirements, which account for the largest share of the cereal imports, are estimated at a near-record level of 6.1 million tonnes in the 2020/21 marketing year (July/June), 10 percent above the previous five-year average, following a steady increasing trend since 2012/13. The strong demand for wheat largely reflects a shift in local diet preferences. Similarly, maize import requirements are expected to remain high, at 1.4 million tonnes, due to the sustained demand for feed. By contrast, rice imports in 2020 are forecast to be limited, at around 185,000 tonnes.

Overall, total cereal import requirements in 2020/21 are forecast to be close to the five-year average of 7.8 million tonnes.

### Prices of rice at high levels in May

Prices of rice declined seasonally in May, weighed down by improving supplies from the 2020 main “Boro” harvest. However, prices remained well above their year-earlier levels, after the increases registered in the previous three months and particularly in April, mostly reflecting an upsurge in domestic demand, with some pressure stemming from early concerns about shortages of labour to harvest the “Boro” season due to the COVID-19-related lockdown. In an attempt to support the vulnerable households, the Government increased the quantities supplied at subsidized prices through the various distribution schemes and to boost its food reserves and support farmers, it doubled the 2020 “Boro” paddy procurement target compared to the same season last year.
Prices of wheat, which is mostly imported, has been decreasing since the beginning of the year, reflecting adequate supplies.

**Food insecurity concerns exist for households affected by Cyclone Amphan. High levels of food insecurity persist for Rohingya refugees in Cox’s Bazar District**

Tropical Cyclone Amphan has severely affected the livelihoods of at least 1 million people, destroyed houses and infrastructure, including irrigation facilities. According to initial Government estimates, the overall damage to housing, infrastructure, fisheries, livestock and crops is set at BDT 11 billion (USD 130 million). The most affected areas are located in the southwestern parts of the country, including the districts of Khulna, Jessore, Satkhira, Bagerha and Pirojpur, Barguna, Patuakhali, Bhota and Noakhali.

As of mid-April 2020, about 915 000 Rohingya refugees from Myanmar reside in the country, mostly in the Cox’s Bazar District. Most refugees fled to Bangladesh following the resurgence of violence in Rakhine State in Myanmar in late August 2017. They reside in temporary settlements where they suffer from high level of food insecurity and require humanitarian assistance to cover their basic needs. In addition, the influx of refugees is putting strain on the already limited resources of the host communities.

**COVID-19 and measures adopted by the Government**

In response to the COVID-19 pandemic, starting from 23 March 2020, the Government has adopted several measures to prevent the spread of the disease, including tightening of controls of movement of people, the national closure of education and public institutions and the control on international flights. The Government has also introduced several fiscal measures to mitigate the impact of the outbreak. These include increased financial resources to the Open Market Sale programme to facilitate the purchase of rice for the most vulnerable households at subsidized prices. The Government will provide loans to companies to support the payment of salaries to about 4 million people for a three-month period. In addition, on 15 April 2020, the Government announced plans to allocate BDT 21.3 billion (USD 251 million) for a housing scheme for the homeless and BDT 7.6 billion (USD 89 million) for the poor people who lost their jobs due to the pandemic.

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Food Security Snapshot

- *Boro* paddy output in 2019 estimated at record high
- Cereal import requirements in 2019/20 forecast close to five-year average
- Prices of rice at low levels in July, after steady declines between September 2018 and April 2019
- Prices of wheat remained generally stable, so far, in 2019 and close to year-earlier level
- Severe floods in northern and eastern parts expected to affect households’ food security
- High levels of severe food insecurity persist in Cox’s Bazar District, where almost 1 million refugees reside

*Boro* paddy output in 2019 estimated at record high

Harvesting of the 2019 *Boro* paddy crop, which accounts for about 55 percent of the annual output, was completed in May. The output is estimated at a record high of 19.7 million tonnes. The large output reflects above-average plantings and high yields, following favourable weather conditions.

The 2019 minor *Aus* paddy crop, accounting for about 10 percent of the total annual output, is currently being harvested. Production is forecast to decrease compared to last year’s high level, mostly reflecting the contraction in plantings as farmers shifted from paddy to more profitable crops, including jute, maize and vegetables. In addition, some standing crops were lost to floods following heavy rainfall in June and the first half of July, mostly in the northern and eastern parts of the country.

Planting of the 2019 *Aman* paddy crop, which accounts for 35 percent of the annual output is ongoing and will continue until end-September. So far, the June-October monsoon season has been characterized by average to above-average precipitation, with an overall positive impact on planting operations and development of crops. Some replanting, due to flood damage, took place in the most affected areas. Overall, the *Aman* area planted is expected to decrease compared to last year’s high level, mostly owing to low market prices.

The 2019 main season maize crop was harvested by the end of July. The output is estimated at a record high level, reflecting an expansion in the area sown, driven by robust demand from the...
feed industry and bumper yields as farmers increased the use of high-yielding seed varieties. The 2019 secondary season maize crop will be planted towards the end of the year.

The production of the 2019 winter wheat crop, harvested in April, is officially estimated at 1.3 million tonnes, close to the five-year average.

Cereal imports in 2019/20 forecast close to five-year average

Wheat import requirements, which account for the largest share of the cereal imports, are estimated at a record of 5.7 million tonnes in the 2019/20 marketing year (July/June), 12 percent above the previous five-year average following steady increases since 2012/13. The strong demand for wheat largely reflects a shift in diet preferences. Similarly, maize import requirements are expected to increase to 1.8 million tonnes, 6 percent more than last year’s record level and the fifth consecutive annual increase due to sustained demand for feed. By contrast, the ample domestic supplies of rice following the record 2018 output have lowered import requirements and, consequently, rice imports are estimated at a well below-average level of 250,000 tonnes.

Overall, total cereal import requirements in 2019/20 are forecast close to the five-year average at 7.8 million tonnes.

Prices of rice at low levels in July, while those of wheat close to year-earlier levels

Domestic prices of rice in the capital, Dhaka, decreased by about 10 percent between January and April 2019, reflecting abundant supplies from the record harvests in 2018. However, since April, prices remained generally stable, reflecting a number of measures implemented by the Government that sought to halt the declining trend of the preceding months. These measures include larger procurement purchases of the Boro season rice crop compared with the same season last year and an increase in import duties now set at 55 percent from the previous 28 percent (FPMA Food Policies). Overall, in July 2019, prices of rice were about 20 percent below their year-earlier levels.

Prices of wheat, which is mostly imported, were relatively stable between April and July 2019, reflecting adequate supplies from imports and the bumper 2019 harvest.

Severe floods expected to worsen food insecurity in northern and eastern parts

In June and early July, severe floods have affected about 5.3 million people, mostly in the northern and eastern parts of the country. The most affected districts are Lalmonirhat, Kurigram, Gaibandha, Sylhet and Sunamganj (located in the north) and some districts in the Dhaka and Chittagong divisions. Floods have deteriorated the already precarious living conditions and the food security situation of about 910,000 Rohingya refugees from Myanmar in the Cox Bazar District. Most refugees fled to Bangladesh following the resurgence of violence in Rakhine State in Myanmar in late August 2017. They reside in temporary settlements where they suffer from high level of food insecurity and require humanitarian assistance to cover their basic needs. In addition, the influx of refugees is putting strain on the already limited resources of the host communities.
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Paddy production in 2018 forecast at record level

Harvesting of the 2018 aman paddy crop, which accounts for about 40 percent of the annual output, started in early November and is expected to finalize in January. Production prospects are favourable reflecting an above average area planted, supported by remunerative producer prices at planting time and expectations of bumper yields following beneficial weather conditions. The 2018 boro and minor aus paddy crops were harvested earlier during the year and official estimates indicate record outputs reflecting the high level of plantings due to strong domestic prices and bumper yields due to favourable weather conditions. Overall, the 2018 aggregate paddy output is forecast at a record of 53.6 million tonnes.

The 2018 maize output, harvested in August, is estimated at 3.2 million tonnes, 6 percent above the previous year’s record level. The bumper output reflects a record area planted due to increasing demand in the feed sector and above average yields following the adoption of new hybrid seed varieties and favourable weather conditions.

The 2018 winter wheat crop, harvested in April, is estimated at 1.3 million tonnes, slightly below the five-year average due to a contraction in plantings as farmers preferred to shift to more remunerative crops as paddy.

Wheat import requirements in 2018/19 forecast at above average level

Wheat import requirements in 2018/19 are estimated at a record level of 6 million tonnes, 34 percent above the previous five-year average following steady increases since 2012/13. The strong demand for wheat reflects a shift in consumers’ diet preferences as well as the increased use as a substitute for more expensive rice. Similarly, maize import requirements are expected to increase to 1.7 million tonnes, 10 percent more than last year’s record due to sustained demand for feed. By contrast, rice import...
requirements are estimated at a well below-average level of 850 000 tonnes reflecting ample supplies from the record 2018 output.

Overall, cereal import requirements in the 2018/19 marketing year (July/June) are estimated at 8.6 million tonnes, almost 30 percent above the five-year average and 22 percent less than previous year’s unusual high level.

Rice prices declining, while prices of wheat stable
Domestic prices of rice in the capital, Dhaka, have decreased by 8 percent between July and November 2018, reflecting large market availabilities from the 2018 harvests, forecast at a record level. Overall, in November prices of rice were 7 percent below their year-earlier levels.

Prices of mostly imported wheat were stable in October and November, after moderate increases between July and September, reflecting adequate market supplies from above-average imports. Overall, in November wheat prices were 6 percent below the level of one year earlier.

Severe food insecurity affecting refugees in Cox’s Bazar District
According to the latest figures from the International Organization for Migration (IOM), as of October 2018, about 923 000 Rohingya refugees from Myanmar were sheltering in Bangladesh, mostly in the Cox’s Bazar District. Most refugees have fled to Bangladesh following the resurgence of violence in Rakhine State of Myanmar in late August 2017. They reside in temporary settlements where they suffer from high level of food insecurity and require humanitarian assistance to cover their basic needs. In addition, the influx of refugees is putting strain on the already limited resources of the host communities.

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Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.
Favourable production prospects for 2018 boro rice
Planting of the irrigated boro rice crop is ongoing and will be completed in February. Favorable weather conditions and adequate input and water supply have supported planting operations. In addition, plantings have also been boosted by attractive paddy prices. Assuming normal weather conditions over the coming months, prospects for the 2018 boro rice are positive.

Similarly, prospects are favourable for the 2018 winter wheat crop, which will be harvested from March.

Paddy production in 2017 estimated marginally below-average
FAO’s latest estimate puts the 2017 aggregate paddy production at 50.8 million tonnes, slightly below the five-year average. This is the result of the crop losses incurred to the three episodes of severe flash floods between April and August 2017, which affected northern districts, in particular.

Maize output in 2017 is estimated at 3 million tonnes, 6 percent above the high level reached in 2016, supported by an increase in plantings and yields. Similarly, the 2017 minor winter wheat crop is estimated at 1.4 million tonnes, showing a 6 percent increase year-on-year.

Cereal imports in 2017/18 marketing year forecast to remain at high level
Cereal imports in the current 2017/18 marketing year (July/June) are forecast at 8.3 million tonnes, 6 percent below last year’s record level and 60 percent above the five-year average. The decrease reflects the expectations of lower rice imports in calendar year 2018, forecast at 1.5 million tonnes, 40 percent below last year’s exceptionally high level, based on preliminary prospects of an output recovery in 2018.
Wheat imports in the 2017/18 marketing year (July/June) are forecast at 6 million tonnes, up 5 percent from last year’s high level owing to increased domestic demand for high-quality wheat for milling. Maize imports are anticipated to remain close to last year’s average level of 400 000 tonnes.

**Rice and wheat prices at higher year-on-year**

After some declines in October and November 2017, prices of rice in Dhaka increased since December 2017 and were more than 20 percent higher than a year earlier, mostly as a result of the production losses caused by the floods in 2017.

Prices of mostly imported wheat and wheat flour have increased strongly in recent months. In January 2018, they were well above their year-earlier levels mostly supported by increased domestic consumption as a substitute for rice. Expectations of a reduced 2018 wheat harvest, due to a contraction in plantings, also added to the upward pressure.

**Large number of people in northern parts affected by severe floods in 2017**

Recurrent floods in 2017 affected at least 8 million people, mainly concentrated in the northern parts of the country. Severe damage to housing and infrastructure, including roads and bridges as well as losses of stored food and livestock, were reported. In addition, higher year-on-year prices for rice, the country’s main staple, continue to negatively affect access to food of the most vulnerable households.

Since the resurgence of violence in August 2017 in Rakhine State of Myanmar, an estimated 688 000 people have fled to Bangladesh. According to UN/OCHA, as of mid-January 2018, more than 970 000 refugees were hosted in Bangladesh. Most of these people rely on humanitarian assistance to meet their basic needs.

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Purpose: GIEWS Country Brief

Bangladesh

Reference Date: 10-May-2017

FOOD SECURITY SNAPSHOT
- Rice production in 2017 forecast to increase, but floods dampen prospects for main “boro” crop
- Cereal imports in 2016/17 marketing year (July/June) forecast to increase to record levels
- Rice prices increasing and at near-record highs, while those of wheat decreasing

Flash floods dampen prospects for 2017 main “boro” paddy crop

Harvesting of the 2017 almost entirely irrigated “boro” paddy crop, accounting for some 55 percent of annual output, will be completed in June. Adequate irrigation water supplies and favourable weather conditions benefitted “boro” paddy development this season, although excess precipitation in late March and early April triggered localized flooding over northeastern producing areas. The inundations occurred just before harvest time, impacting crops in Sylhet, Dhaka and Mymensingh divisions in particular.

Planting of the minor “aus” paddy crop, which accounts for 7 percent of annual output, is currently ongoing and will be followed by the June start of “aman” plantings. Assuming normal growing conditions prevail, early prospects for these crops are favourable, on anticipation that attractive paddy prices will stimulate increases in plantings. As a result and pending assessments of “boro” damages incurred, FAO tentatively forecasts aggregate 2017 paddy production at 53.1 million tonnes, 1 percent above last year’s level.

Harvesting of the 2017 recently-completed minor winter wheat crop is estimated by FAO at 1.4 million tonnes, reflecting an increase in yields owing to favourable weather conditions.

Cereal imports in 2016/17 marketing year forecast to increase to record level

Cereal imports in the current 2016/17 marketing year (July/June) are forecast at 5.9 million tonnes, 11 percent above last year’s high level and a new record. The increase reflects larger wheat imports, which are officially forecast at 5.4 million tonnes, up 24 percent from last year’s level owing to increased domestic demand for high-quality wheat for milling. By contrast, rice imports in the 2016/17 marketing year (April/March), which
already concluded, are estimated at close to 115,000 tonnes, well below the 614,000 tonnes imported in 2015/16. Maize imports are anticipated to remain close to last year’s average level of 400,000 tonnes.

**Rice prices increasing, while those of wheat decreasing**

Retail and wholesale prices of rice have been increasing since February 2017 following seasonal trends. Prices were 35 percent higher than a year earlier, after steep increases registered in the second part of 2016 in response to lower imports and reduced 2016 main “boro” and “aus” outputs. Prices of mostly imported wheat and wheat flour have been generally stable during the last 12 months with a slight decrease in March, as a result of improved availabilities from the 2017 wheat harvest and increased imports in recent months. The continuing distribution of wheat flour by the Government through Open Market Sales (OMS) also contributes to keep prices at low levels.

**Large number of people in northern and central parts affected by severe floods in 2016**

Heavy monsoon rains in July 2016 caused a series of localized floods and landslides, mostly concentrated in northern and central parts of the country, affecting at least 3.7 million people. The most affected districts include Kurigram, Gaibandha, Jamalpur, Lalmonirhat and Sirajganj, located in the north, and Tangail, Madaripur, Manikganj and Shariatpur, in the centre. Floods followed earlier tropical Cyclone Roanu which triggered strong winds, landslides and flooding over southern coastal areas in mid-May affecting at least 1.3 million people.

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Aggregate rice production in 2016 forecast slightly below last year’s record level

Harvesting of the 2016 “aman” season rice crop, accounting for 40 percent of the annual output, is expected to start in November and continue until January. Overall, favourable weather conditions during the cropping season benefited sowing activities and crop development. FAO currently forecasts the 2016 “aman” paddy production at 20.6 million tonnes, 2 percent above the 2015 record. This reflects an increase in the area planted, in response to a rebound in prices and continued Government support and higher yields due to favourable weather conditions. Harvesting of the 2016 “boro” and “aus” seasons rice were completed earlier in the year. The “boro” production is officially estimated at 28.4 million tonnes, slightly below the 2015 record, owing to a contraction in planted areas, mainly in response to low domestic prices at sowing time. Similarly, low prices were behind area cuts to the 2016 “aus” crop, which is estimated by FAO to reach 3.4 million tonnes, down 2 percent year-on-year. Overall, FAO forecasts the 2016 aggregate rice production at 52.3 million tonnes, marginally below the 2015 record level.

Harvesting of the 2016 maize crop is nearing completion and is forecast by FAO at 2.6 million tonnes, slightly above last year’s record. The 2016 minor winter wheat crop, harvested by April, is officially estimated to have increased marginally to 1.36 million tonnes.

Cereal imports in 2016/17 marketing year forecast to decrease from last year’s record

Cereal imports in the current 2016/17 marketing year (July/June) are forecast at 5.3 million tonnes, 6 percent down from last year’s record level. The decrease reflects lower rice imports which are forecast at 350 000 tonnes, nearly half the level of 2015/16, in line with expectations of sufficient local availabilities from a large 2016 crop and high carryover stocks. The successive increases of the import duty on rice, which in June 2016 was set to
25 percent, also trimmed down imports. This constituted the second duty increase since import tariffs were reintroduced in May 2015. Similarly, maize imports are set to decrease to 550 000 tonnes from the previous year’s high level. Wheat imports are anticipated to remain close to last year’s record at 4.4 million tonnes.

**Rice prices surged to record highs, while those of wheat are stable**

Retail and wholesale prices of rice reached record highs in September after strong increases since June as a result of tightening domestic supplies. Seasonal upward pressure was exacerbated by a reduced 2016 main boro and the smaller aus crops gathered earlier in the year and low imports in recent months. Ongoing Government procurement purchases, albeit not large, also provided some support. In order to make rice more affordable for the poor, the Government launched, in mid-September, a new social safety scheme which adds to several other safety net programmes already in place.

Prices of mostly imported wheat and wheat flour were stable in September and below their year-earlier levels due to record imports by the private sector and a bumper 2016 harvest. The continuing distribution of wheat flour by the Government through Open Market Sales (OMS) also keeps prices low.

**Severe floods affected large number of people in northern and central parts**

Heavy monsoon rains in July caused a series of localized floods and landslides, mostly concentrated in northern and central parts of the country, affecting at least 3.7 million people and damaging a total of 251 716 houses. The most affected districts include Kurigram, Gaibandha, Jamalpur, Lalmoinirhat and Sirajganj located in the north and Tangail, Madaripur, Manikganj and Shariatpur in the centre. The floods in July followed earlier tropical cyclone Roanu, which triggered strong winds, landslides and flooding over southern coastal areas in mid-May, affecting at least 1.3 million people.
**Rice production in 2016 forecast close to last year’s record level**

Harvesting of the 2016 main “boro” season rice crop has recently completed. FAO estimates this season’s output at 28.1 million tonnes, slightly below the corresponding season last year. The decrease is the result of a small contraction in plantings, in response to low domestic prices. Planting of the 2016 “aus” season was completed in mid-May under above-average rains, which facilitated land preparation and early crop development. Planting of the 2016 “aman” crop just started and will continue until August. Assuming that a good monsoon season and continued Government support will result in higher “aus” and “aman” crops, offsetting the slightly reduced “boro” output. FAO tentatively forecasts the 2016 aggregate rice production at 52.2 million tonnes, virtually unchanged from the 2015 record level.

**Cereal imports in 2015/16 marketing year forecast to decrease considerably from last year’s record**

Cereal imports in the current 2015/16 marketing year (July/June) are forecast at 4.2 million tonnes, 21 percent down from the last year’s record level. The decrease reflects lower rice imports, which are estimated at 615 000 tonnes from the 1.5 million tonnes of the previous year, in line with the record production in 2015 and large carryover stocks. Similarly, wheat imports are estimated to decrease to 3.5 million tonnes from previous year’s high level, due to high level of stocks.

**Rice and wheat prices on decrease and well below their year-earlier levels**

Domestic rice prices decreased since February, reflecting good availabilities from the 2015 output, estimated at a record level and from the recently-harvested 2016 main season crop. Similarly, prices of mostly imported wheat flour decreased further in April and were well below their year-earlier levels. The drop reflects good availabilities from the 2016 bumper output and strong imports this year. Continuing distribution by the Government through Open Market Sales (OMS) at prices lower than last year and now being extended beyond metropolitan areas to cover the whole country also added to the downward pressure on prices.
GIEWS Country Brief
Bangladesh

Reference Date: 28-October-2015

**FOOD SECURITY SNAPSHOT**
- Aggregate rice production in 2015 forecast at record level
- Cereal imports in 2015/16 marketing year (July/June) forecast to decrease considerably
- Rice and wheat prices well below their year-earlier levels
- Floods affect households in southern parts of the country

**Aggregate rice production in 2015 forecast at record level**
Harvesting of the 2015 “aman” season rice crop, accounting for some 40 percent of annual output, is expected to start in November and will continue until mid-December. Overall, widespread abundant rains during the cropping season were beneficial for crop development, although the passage of Cyclone “Komen” on 30 July reportedly triggered some localized floods across southeastern parts of the country, causing minor damage to crops. FAO currently forecasts the 2015 “aman” season rice production at 19.6 million tonnes, 1 percent below the 2014 record of the corresponding season. Increased yields are expected to partially offset a 2 percent contraction in the area planted, in response to low domestic prices at sowing time. Harvesting of 2015 “boro” and “aus” seasons rice crops were completed earlier in the year. The “boro” production is officially set at a record level of 28.8 million tonnes as a result of higher plantings and the “aus” output is estimated to remain close to last year’s level. Overall, FAO currently forecasts the 2015 aggregate rice production at 51.9 million tonnes, close to 2014 record level.

Latest official estimates for the 2015 minor winter wheat crop, harvested by April, indicate a 2 percent higher output of 1.35 million tonnes. This increase reflects a slight expansion in plantings, largely attributed to overall attractive prices.

**Cereal imports in 2015/16 marketing year forecast to decrease considerably from last year’s record**
In aggregate, the country’s cereal imports for the current 2015/16 marketing year (July/June) are forecast at 4.3 million tonnes, 19 percent down from last year’s record level. The decrease reflects lower rice imports in the 2015/16 marketing year (April/March), which are forecast to decline to 570 000 tonnes from the 1.5 million tonnes of the previous year, in line with the expected record production this year and large carryover stocks. Wheat imports are forecast to remain close to last year’s high level at 3.7 million tonnes, due to high domestic demand and based on the current expectations that the Government will continue its efforts to restore stocks for the public distribution programmes.

**Rice and wheat prices well below their year-earlier levels**
Domestic rice prices were stable for the fourth consecutive month in September and were well below their year-earlier levels, reflecting adequate supplies from the recently-completed “aus” harvest and large rice imports by the private sector in recent months. Prices of mostly...
imported wheat flour have been decreasing since the beginning of the year and were below their year-earlier levels as a result of a record crop this year coupled with high import volumes by the private sector since the beginning of the year. Continuing distribution by the Government through open market sales also put downward pressure on wheat prices.

**Floods affect households in the southern parts of the country**

According to estimates of a Joint Needs Assessment conducted in cooperation with the Government of Bangladesh, representatives from UN agencies as well as NGOs, over 1.8 million people have been severely affected by the recent floods and the passage of Cyclone “Komen”. Severe damage to housing and infrastructure, including roads and bridges has also been reported. In addition, losses of stored food and livestock are likely to be high in the most affected areas, resulting in a deterioration of the food security situation of the affected population.
2014 aggregate rice production forecast to expand slightly to a record high

Harvesting of the 2014 Aman season rice crop is expected to start in early November and continue until mid-December. Overall, rainfall between June and mid-October has been near-average over the main rice-producing areas benefiting sowing activities and crop development. However, heavy rains during the second dekad of August over northwestern and northeastern parts of the country, coupled with onrush of water from upstream in India led to localized floods, resulting in some crop losses in some areas. In spite of this, the overall damage to the 2014 Aman season paddy crop is expected to be minimal. As a result, FAO’s preliminary forecast for this season stands at 19.7 million tonnes, slightly above last year’s same season bumper crop. This reflects an increase in the area planted, in response to high prices at sowing time, coupled with higher yields due to the good rains during the season and increased use of improved seeds. Under current expectations, FAO tentatively forecasts the 2014 aggregate rice production (including Aus, the ongoing Aman and forthcoming Boro seasons) at 52.5 million tonnes, up 2 percent from the 2013 output. On average, Aus, Aman and Boro seasons account for 7, 38 and 55 percent, respectively, of annual paddy production.

Harvesting of the 2014 maize crop in nearing completion. FAO’s latest forecast points to a maize crop of 2.3 million tonnes, slightly above last year’s record output.

FAO’s estimates the 2014 mostly irrigated small wheat crop, harvested by April, at 2 percent from last year’s good level to 1.4 million tonnes.

Cereal imports in 2014/15 marketing year forecast to decrease slightly

In aggregate, the country’s cereal imports for the current 2014/15 marketing year are forecast at 3.2 million tonnes, some 3 percent down from last year’s near-average level. The projected decrease mainly reflects lower rice imports, which are expected to decrease to 400 000 tonnes in 2015 from the 600 000 tonnes in 2014, based on an anticipated record 2014 production. By contrast, wheat imports are forecast to increase by 4 percent to 2.8 million tonnes from last year’s high level, based on the current expectations that the Government will continue its efforts to restore stocks for the public distribution programmes.

Rice prices stable, while those of wheat declined

Domestic rice prices were generally stable in September and similar to
last year’s level, with the downward pressure from good outputs of the Boro and Aus crops offset by the Government Boro rice procurement, which was extended until 15 October. The procurement started in May with a target of 1.1 million tonnes of rice. Rice was bought at BDT 31 (USD 0.40) per kg for parboiled rice, at BDT 30 (USD 0.39) per kg for white rice and at BDT 20 (USD 0.26) per kg for paddy. On the contrary, prices of wheat flour decreased further in September as a result of continuing distributions by the Government through open market sales.

While the official procurement price for the 2014 Aman season rice has not still been fixed by the Ministry of Agriculture, the production costs, which are the base of the procurement price, have been increased compared to last year’s same season. The production cost per kilogramme of milled rice has been increased by 10 percent to BDT 28 (USD 0.36) and that of paddy by 6 percent to BDT 18 (USD 0.23). The decision to increase the production cost reflects mainly higher prices of tilling, fertilizers, irrigation and labour.

According to the Bangladesh Bureau of Statistics the year-on-year CPI in September 2014 was recorded at 6.8 percent relative to the same period last year.

Localized food insecurity persists

Overall, food supply conditions are stable following consecutive years of relatively good harvests. However, frequent natural disasters, including the recent floods in the northern part of the country have further aggravated the food security situation of the affected households. According to the latest official assessments, as of mid-September, the floods displaced at least 275 000 people and adversely affected nearly 3 million. Severe damage to housing, infrastructure and agriculture is also reported. Similarly, the relatively high domestic rice prices are limiting access to food of low-income groups of the population.
GIEWS Country Brief
Bangladesh

Reference Date: 16-June-2014

FOOD SECURITY SNAPSHOT
- The 2014 wheat production estimated higher than last year
- The 2013 aggregate rice production officially estimated at a record level
- Sharp increase in cereal imports in 2013/14 marketing year (July/June)
- Rice and wheat prices decline slightly
- Localized food insecurity persists

The 2014 wheat production estimated higher than last year
Harvesting of the 2014 mostly irrigated small wheat crop was completed by April. FAO’s latest estimates point to a production increase of 2 percent from last year’s good level to 1.4 million tonnes. This reflects a slight expansion in area planted due to high prices at sowing time and improved yields, following adequate supplies of irrigation water.

Planting of the 2014 Aus season rice crop was completed by mid-May. According to remote-sensed data, rainfall from early March to early June over the main rice-producing areas has been above-average, facilitating land preparation and early crop development. FAO’s initial forecasts put this season’s output at 3.6 million tonnes, 3 percent above the corresponding season of last year. Assuming a good monsoon season and continued Government support to the rice sector, FAO tentatively forecasts the 2014 aggregate rice production (including the ongoing Aus, Aman and Boro seasons) at 52 million tonnes, similar to last year’s record output. On average, Aus, Aman and Boro seasons account for 7, 38 and 55 percent, respectively of annual paddy production.

The 2013 aggregate rice production officially estimated at a record level
Harvesting of the 2013/14 mostly irrigated main Boro rice crop has just been concluded. The output is officially estimated at a record level 28.5 million tonnes, slightly up on last year’s bumper output of the same season. In aggregate, 2013 rice production is officially estimated at a record level of 51.5 million tonnes, up 2 percent from the 2012 good output. This reflects a slight expansion in area planted and record yields, following favourable weather conditions during the cropping seasons and Government support to the rice sector, in form of seed, fertilizer and fuel subsidies.

Sharp increase in cereal imports in 2013/14 marketing year (July/June)
In aggregate, the country’s cereal imports for the current 2013/14 marketing year (July/June) are forecast at 3.2 million tonnes, almost 70 percent higher than last year’s below-average level. The projected increase mainly reflects higher wheat imports, which are expected to increase by 40 percent to 2.6 million tonnes from last year’s low level, reflecting Government efforts to restore stocks for the public distribution
programmes and stabilize domestic prices. Rice imports, mainly by private traders, are forecast to increase to 600,000 tonnes in 2014 from the 15,000 tonnes last year, prompted by lower prices in international market.

**Rice and wheat prices decline slightly**

Domestic rice prices decreased slightly in May with the start of the 2014 Boro season harvest and were higher than a year earlier. Rice prices are expected to decline further in the coming months when the bulk of the harvest will enter the markets. Similarly, wheat flour prices weakened in May, as a result of the record 2014 wheat harvest and continuing distributions by the Government through open market sales. However, the ongoing procurement programme, which is set to end in June, offset further price declines.

According to the Central Bank of Bangladesh the year-on-year CPI in April 2014 was recorded at 7.5 percent relative to the same period last year.

**Localized food insecurity persists**

The negative effects of frequent natural disasters, including localized floods during the 2013 cropping season have affected the food security of the vulnerable households. Similarly, the relatively high domestic rice prices are limiting access to food of low-income groups of the population.
The 2014 wheat production estimated higher than last year
Harvesting of the 2014 mostly irrigated small wheat crop was completed by April. FAO’s latest estimates point to a production increase of 2 percent from last year’s good level to 1.3 million tonnes. This reflects a slight expansion in area planted due to high prices at sowing time and improved yields, following adequate supplies of irrigation water.

Planting of the 2014 Aus season rice crop is nearing completion. According to remote-sensed data, rainfall from early March to mid-May over the main rice-producing areas has been above-average, facilitating land preparation and early crop development. FAO’s initial forecasts put this season’s output at 3.6 million tonnes, 3 percent above the corresponding season of last year. Assuming a good monsoon season and continued Government support to the rice sector, FAO tentatively forecasts the 2014 aggregate rice production (including the ongoing Aus, Aman and Boro seasons) at 52 million tonnes, similar to last year’s record output. On average, Aus, Aman and Boro seasons account for 7, 38 and 55 percent, respectively of annual paddy production.

The 2013 aggregate rice production officially estimated at a record level
Harvesting of the 2013/14 mostly irrigated main Boro rice crop has just been concluded. The output is officially estimated at a record level 28.5 million tonnes, slightly up on last year’s bumper output of the same season. In aggregate, 2013 rice production is officially estimated at a record level of 51.5 million tonnes, up 2 percent from the 2012 good output. This reflects a slight expansion in area planted and record yields, following favourable weather conditions during the cropping seasons and Government support to the rice sector, in form of seed, fertilizer and fuel subsidies.

Higher cereal imports in 2013/14 marketing year (July/June)
In aggregate, the country’s cereal imports for the current 2013/14 marketing year (July/June) are forecast at 3 million tonnes, almost 60 percent higher than last year’s below-average level. The projected increase mainly reflects higher wheat imports, which are expected to increase by 40 percent to 2.6 million tonnes from last year’s low level, reflecting Government efforts to restore stocks for the public distribution programmes and stabilize domestic prices. Rice imports, mainly by local production year.
private traders, are forecast to increase to 400,000 tonnes in 2014 from the 150,000 tonnes last year, prompted by lower prices in international market.

**Rice prices stable but at high levels**

Domestic rice prices remained stable in April ahead of the 2013/14 Boro season harvest. Rice prices are expected to decline further in the coming months when the bulk of the harvest will enter the markets. Prices of wheat flour decreased slightly in April as a result of improved availabilities from the recently-completed 2014 wheat harvest as well as distributions by the Government through open market sales.

According to the Central Bank of Bangladesh the year-on-year CPI in April 2014 was recorded at 7.5 percent relative to the same period last year.

**Localized food insecurity persists**

The negative effects of frequent natural disasters, including localized floods during the 2013 cropping season have affected the food security of the vulnerable households. Similarly, the relatively high domestic rice prices are limiting access to food of low-income groups of the population.

### Bangladesh

**Retail cereal prices in Dhaka**

<table>
<thead>
<tr>
<th></th>
<th>Rice (coarse)</th>
<th>Wheat (flour)</th>
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<tbody>
<tr>
<td><strong>Source:</strong> Department of Agriculture Marketing (DAM), Bangladesh</td>
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<table>
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<th>Month</th>
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<tbody>
<tr>
<td>Price</td>
<td>28</td>
<td>29</td>
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</table>
Reference Date: 20-January-2014

**FOOD SECURITY SNAPSHOT**
- Sowing of the 2013/14 Boro rice crop on schedule with some delays in input supplies
- Record 2013 paddy harvest estimated
- Rice prices at near record levels
- Localized food insecurity persists

**Sowing of the 2013/14 Boro rice crop on schedule with some delays in input supplies**

Planting of the 2013/14 early season crops, almost entirely irrigated Boro rice and winter wheat, is almost complete. Reportedly, as of first week of January, some 4.78 million hectares have been planted under Boro paddy, similar to last year’s good level of the same season. However, the final outcome of the season is likely to be affected by the delays in input supplies, including fertilizer, diesel and water for irrigation, as well as the below-average rainfall during November and December over much of the country. The ongoing civil protests have caused transport problems and disruptions in market deliveries. These developments notwithstanding, the official target for this season production has been set at 18.9 million tonnes, slightly above last year’s record output.

For the 2013/14 winter wheat, early official targets indicate a two-percent higher output at 1.28 million tonnes, mainly reflecting some expansion in plantings.

**Record 2013 paddy harvest estimated**

Harvesting of the 2013 Aman paddy crop was completed by mid December and latest official estimates point to a record harvest of 19.7 million tonnes, up 2 percent on last year’s bumper output of the same season. The increase is mainly attributed to adequate availability of productive inputs, improved prices and favourable rainfall. In aggregate, including Aus, Aman and ongoing Boro seasons, the 2013/14 rice output is estimated at a record level of 51.5 million tonnes, some 1.5 percent up on the year before. On average, Aus, Aman and Boro seasons account for 7, 38 and 55 percent, respectively, of the annual paddy production.

Similarly, the 2013 winter wheat crop is officially estimated at a record level of 1.26 million tonnes, some 26 percent above the good level of 2012. The increase is mainly attributed to an estimated 16 percent expansion in plantings and higher yields following favourable weather conditions.

Overall, the cereal output for 2013 is estimated at 54.9 million tonnes, slightly above the previous year.

**Lower cereal imports in 2013/14 marketing year (July/June)**

Import requirements, for the current 2013/14 marketing year (July/June) are estimated at 1.3 million tonnes, some 32 percent lower than last year’s below-average level. The decrease reflects, in part, lower wheat

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**Bangladesh Crop calendar**

- Potatoes
- Rice (Aman)*
- Rice (Aus)*
- Rice (Boro)*
- Sorghum
- Wheat

**Bangladesh Cereal production**

<table>
<thead>
<tr>
<th></th>
<th>2008-2012 average</th>
<th>2012 forecast</th>
<th>2013 change</th>
<th>percent</th>
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<td>1,301</td>
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<tr>
<td>Wheat</td>
<td>988</td>
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<td>1,281</td>
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<tr>
<td>Others</td>
<td>61</td>
<td>76</td>
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<tr>
<td>Total</td>
<td>51,717</td>
<td>54,126</td>
<td>54,897</td>
<td>1</td>
</tr>
</tbody>
</table>

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

**Bangladesh Total cereal imports**

- Average
- 2008/09-2012/13: 3423
- 2012/13: 1971
- 2013/14 forecast: 1340

Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS/Country Cereal Balance Sheets
imports, following a record wheat production.

**Retail rice prices at near record levels**

Despite the favourable recent harvest of the 2013 Aman season, retail rice prices have been generally increasing since November 2012 and reached near record levels in December 2013. Prices were mainly affected by the transport problems and are supported by Government plans to procure 350,000 tonnes of Aman rice at price 3.4 percent above those of last season, starting 1 December 2013. Prices of wheat flour, which had steadily decreased between April 2013 and October 2013, increased for the two consecutive months, following the announcement that the Government’s open market sales will be suspended from 4 December.

In December 2013, the year-on-year CPI is estimated at 7.4 percent relative to the same period last year. The food component of the CPI stood at 9 percent.

**Localized food insecurity persists**

The negative effects of frequent natural disasters, including localized floods in June, July, and September. Furthermore, violent demonstrations and disturbances in some areas and other localized problems have raised the level of food insecurity of the affected households.
**FOOD SECURITY SNAPSHOT**
- Good performance for the 2012/13 early season crops
- Near record 2012 paddy harvest estimated
- Rice prices remain generally stable at relatively high levels while wheat prices stabilise after a steady increase
- Localized food insecurity persists

**Good performance for the 2012/13 early season crops - Boro rice and winter wheat**

Harvesting of the 2012 Boro paddy crop was completed by mid May and FAO latest estimates point to a near record harvest of 28 million tonnes. Harvesting of the mostly rainfed 2013 Aus paddy crop is about to start and will continue into August. According to remote sensing data, rainfall has been below average in March over large parts of the country, leading to a slow start of planting operations. Rains however, resumed normal pattern in April and early May, supporting late plantings and early crop development. In mid-May tropical cyclone Mahasen brought heavy rains to south-western coastal areas, flooding some cropped fields, particularly in Barguna, Bhola and Patuakhali districts of Barisal Division. The heavy rains however, also relieved areas that had experienced moisture deficits in preceding months, supporting planting of the Aman paddy crop, which commenced in late May and will continue into August.

Early official targets for the current cropping season indicate that the 2013 Aus paddy crop is expected to reach 3.6 million tonnes, some 12 percent above last year’s output of the same season, mainly reflecting a 10 percent expansion in plantings. FAO preliminarily forecasts the 2013 aggregate paddy output, including the ongoing Aus, Aman and Boro seasons, at a record level of 51.2 million tonnes.

Similarly, the 2013 winter wheat crop is estimated by FAO at a good level of 1.1 million tonnes slightly up on 1 million tonnes during 2012.

**Near record 2012 paddy harvest estimated**

In aggregate, the 2012 rice output is estimated at 50.6 million tonnes (equivalent to 33.7 million tonnes in milled terms), slightly below the record crop the year before. The slight decrease in total crop production is mainly attributed to a decrease in plantings of Aus and Boro paddy crops, following area diversions to more profitable crops for Aus and area contractions prompted by higher fuel costs for irrigation for Boro season. On average Aus, Aman and Boro seasons account for 7, 38 and 55 percent, respectively, of the annual paddy production.

Overall, the cereal output for 2012 is estimated at 53.7 million tonnes, slightly above the previous year.

Import requirements, for the current 2012/13 marketing year (July/June) are estimated at 2.4 million tonnes, some 23 percent higher than last year’s below-average level. The increase reflects, in part, higher wheat demand, since wheat constitutes the bulk of the imports.
Rice prices remain generally unchanged while wheat prices stabilise after a steady increase

Retail rice prices, which had increased between November 2012 and February 2013, have remained generally stable at relatively high levels since then. Downward pressure on prices from the main 2013 *Boro* harvest was partially offset by government procurement. Prices of wheat flour, which had steadily increased between July 2012 and February 2013, decreased for two consecutive months, following the price trend in the international markets. The retail wheat flour price in Dhaka in May 2013 was about 11 percent above the level of the same month a year earlier.

The year-on-year monthly food price inflation is estimated at 8.4 percent in May 2013, higher than the 7.9 percent general price inflation.

Localized food insecurity persists

The lingering effects of frequent natural disasters, including the floods at the end of June, mid-July, late September in 2012 and mid-May in 2013, violent demonstrations and disturbance in some areas and other localized problems have raised the level of food insecurity of the affected households. According to the official reports the recent floods in May 2013 affected around 1.5 million people, damaged agricultural infrastructure, water and sanitation facilities and suffered loss of assets including houses, grain stocks, poultry and livestock.
GIEWS Country Brief
Bangladesh

Reference Date: 14-December-2012

FOOD SECURITY SNAPSHOT
- Favourable weather at the start of the 2012/13 cropping season
- Record 2012 paddy harvest estimated
- Rice prices remain generally stable at low levels while wheat prices continue to rise
- Localized food insecurity persists

Favourable weather at the start of the 2012/13 cropping season
Planting of the 2012/13 country’s main crops, almost entirely irrigated Boro rice and winter wheat, is underway. Above-normal rainfall in early November over large parts of the country supplemented soil moisture and was generally favourable for planting. Early official targets for the current cropping season indicate that the Boro paddy crop is expected to reach 18.8 million tonnes, slightly above last year’s record crop.

Record 2012 paddy harvest estimated
Harvesting of the 2012 Aman paddy crop is almost complete and latest estimates point to a record harvest of 13 million tonnes. In aggregate, including Aus, Aman and ongoing Boro seasons, the 2012 rice output is estimated at 51.3 million tonnes (equivalent to 34.2 million tonnes in milled terms), some 1.2 percent up on 2011. Generally favourable rainfall and continued government input assistance (i.e. high yielding seed varieties and fertilizers), are attributed to the increase in total crop production. However, dry weather in August and flash floods, particularly in north and south-western region at the time of planting, led to some localized crop losses to Aman crop. On average Aus, Aman and Boro seasons account for 7, 38 and 55 percent, respectively, of the annual paddy production.

Wheat production, officially estimated at about 1 million tonnes, showed a 4 percent increase compared to the previous year. A combination of favourable climatic conditions and high yielding variety seeds were the main factors responsible for the increase. Overall, the cereal output for 2012 is estimated at 54.5 million tonnes, 2 percent above the previous year.

Import requirements, for the current 2012/13 marketing year (July/June) are estimated at 3.2 million tonnes, some 44 percent higher than last year’s below-average level. The increase reflects, in part, higher wheat demand, since wheat constitutes the bulk of the imports.

Rice prices remain generally stable at low levels while wheat prices continue to rise
Rice prices have been generally stable at relatively low levels since December 2011, following satisfactory consecutive domestic harvests, sufficient domestic stocks and continuous public rice distribution through Open Market Sale (OMS) programme implemented by the Government. Rice prices in November were 6.4 percent below the high levels of a year ago.

On the other hand, prices of wheat flour have been increasing in recent
months, after a slowdown of wheat imports and due to rising international wheat prices (particularly in the region). The retail wheat flour price in Dhaka in November 2012 was about 19.5 percent above the level of the same month a year ago.

The year-on-year monthly food price inflation is estimated at 6.5 percent in November 2012, lower than the 7.4 percent general price inflation.

**Localized food insecurity persists**

The lingering effects of frequent natural disasters, including the floods at the end of June, mid-July and late September, combined with rodent and pig attacks on crops, communal conflicts in some areas such as the remote Chittagong Hill Tracts in south-eastern parts of the country and other localized problems have raised the level of food insecurity of the affected households. In 2012, the floods affected around 1.3 million people, damaged agricultural infrastructure, water and sanitation facilities.

Furthermore, the affected population suffered loss of assets including houses, grain stocks, poultry and livestock.
Mixed performance of 2012 Aus season, as good planting rains were followed by below average precipitation

Harvesting of the 2012 Aus paddy crop is just underway and is expected to continue until mid-August. The rainfall situation at the start of the Aus season was above average in the main producing areas, however, this was followed by below average rains in May. No official forecast is yet available but FAO preliminarily puts the expected harvest at the same level as last year’s record output.

According to the Bangladesh Meteorological Department the southwest monsoon began in mid June and is fairly active over the country and moderate to strong over North Bay. Accordingly planting of the Aman paddy crop commenced in May and will continue into August.

On average Aus, Aman and Boro seasons account for 7, 38 and 55 percent, respectively, of the annual paddy production. Although the performance of the monsoon rains will determine the final outcome, of the Aman season, FAO tentatively forecasts the aggregate paddy output for 2012 at 51.8 million tonnes, some 2 percent above the 2011 estimate.

Record level paddy crop production in 2011

Recently released production estimates, from the Bangladesh Bureau of Statistics (BBS), indicate that the Boro paddy production remained at 27.9 million tonnes, unchanged from the year before. High energy prices and power shortages which reportedly affected irrigation activities were partly responsible for the lack of growth in production. Similarly, the official estimates show virtually no change in the Aman harvest at 19.2 million tonnes, on account of the localized floods affecting many low-lying areas in the coastal south-west, south-central and the northern regions.

Overall, the national paddy output in 2011 is officially estimated at 50.6 million tonnes (equivalent 33.7 million tonnes in milled terms), a modest increase of 1 percent from the 2010 record level. The winter wheat production also is officially estimated to have remained steady at 970 000 tonnes from 2010 level.

Total commercial import requirements are estimated at 3.4 million tonnes for the nearly concluded 2011/12 marketing year (July/June), some 44 percent below the level recorded last year, reflecting, in part, cereal record harvests and large carryover stocks.

Wheat prices decline in recent months while rice

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GIEWS Country Brief

Bangladesh

Reference Date: 27-June-2012

FOOD SECURITY SNAPSHOT

- Mixed performance of 2012 Aus season
- Record level paddy crop production in 2011
- Wheat prices declined in the recent months while rice prices remained generally stable at low levels
- Localized food insecurity persists

Mixed performance of 2012 Aus season

Record level paddy crop production in 2011

Rice prices decline in recent months while rice prices remain ed generally stable at low levels
prices remain generally firm at low levels

Rice prices have been stable in recent months at relatively low levels, following the satisfactory paddy production, as well as release of stocks by traders. Government sales under various subsidy programs have also contributed to the price decline. Rice prices in first two weeks of June were 11 percent below the high levels of a year earlier. Prices of wheat flour also have been decreasing for the third consecutive month in June following the trend in international markets. However, the retail wheat flour price in Dhaka in June 2012 was about 15 percent above the level of the same month a year ago.

Lower cereal prices have contributed to the falling year-on-year monthly food price inflation, which was estimated at 7.5 percent in May 2012, lower than the 9.2 percent general price inflation.

Localized food insecurity persists

The lingering effects of frequent natural disasters, including the floods during July/August 2011, rodent and pig attacks on crops, communal conflicts in remote Chittagong Hill Tracts in south-eastern parts of the country and other localized problems have led to international appeals for food and agricultural assistance for the vulnerable populations, especially in Sajek and Remarkri Unions.

According to the local administration around 1.3 million people were severely affected and became homeless owing to the floods in 2011. About 26 709 hectares of standing crops were damaged in 18 of the 64 districts. Damage to poultry and livestock sector and agricultural infrastructure also occurred, with a loss of some 861 000 animals. Furthermore, the affected population suffered loss of assets including houses, grain stocks and agricultural infrastructure.
GIEWS Country Brief
Bangladesh

Reference Date: 13-February-2012

FOOD SECURITY SNAPSHOT
- Poor rains recorded during 2011/12 agricultural season
- Record harvests of 2011 Aman (main wet season) paddy is forecast
- Rice prices decreased in the recent months while wheat prices continue to rise
- Localized food insecurity persists

Poor rains recorded during 2011/12 agricultural season
Planting of the 2011/12 country’s main crop, irrigated Boro paddy planted in January and winter wheat crop planted during November to January is complete. The rainfall situation during the first two months of the 2011/12 agricultural season (November - December) was rather poor. Although rains picked-up in the first dekad of January, uneven distribution of rains was experienced from mid-January to early February.

Supplementary irrigation may require for high land Boro crop if dry weather continues.

Record harvests of 2011 paddy crop, Boro, Aus and Aman seasons, is estimated
In spite of the localized flooding which affected many low-lying areas in the coastal south-west, south-central and the northern regions, the 2011 Aman season production is forecast to reach record levels.

The Government has revised production forecast of the 2011 Aman season paddy crop to a new record at 31.8 million tonnes, an increase of about 4.0 percent over the previous year’s bumper harvest of the corresponding season. On average Boro, Aman and Aus seasons account for 56, 38 and 6 percent, respectively, of the annual paddy production. FAO puts the 2011 annual paddy output, including forecast output of Aman season, at a record level of about 51.9 million tonnes (equivalent to 34.6 million tonnes of milled rice), some 3.2 percent above last year’s another record output.

Similarly, wheat production, estimated at about 1.1 million tonnes showed a 13 percent increase compared to the previous year. A combination of a favourable climatic conditions and high yielding variety seeds were the main factors responsible for the increase.

According to the final FAO estimate, another record aggregate cereal production should be obtained in 2011 at 54.2 million tonnes. The record harvests are expected to reduce the total cereal import requirements during 2011/12 marketing year (July/June).

Rice prices decreased in the recent months while wheat prices continue to rise
Rice prices have been decreasing since September 2011, following the satisfactory Aman and Aus paddy production, as well as the release of stocks by traders. Government sales under various subsidy programs.
have also had an impact on the rice prices. Rice prices in January were 18 percent below the high levels of a year ago. In contrast, prices of wheat flour have been rising for the fifth consecutive month in January after a slowdown of imports by the private sector. Nonetheless, the retail wheat flour price in Dhaka in January 2012 was about 15 percent below the level of a year earlier.

The year-on-year monthly food price inflation is still quite high and was estimated at 10.9 percent in January which showed a small increase from the month earlier.

Localized food insecurity persists
According to the local administration around 1.3 million people were severely affected and became homeless owing to the floods. About 26 709 hectares of standing crops were damaged in 18 of the 64 districts. Reportedly, damage to poultry and livestock sector and agricultural infrastructure also occurred, with a loss of some 861 000 animals. Furthermore, the affected population has suffered loss of assets including houses, garden produce, grain stocks and agricultural infrastructure.

The deteriorating situation has lead to international appeals for food and agricultural assistance for the vulnerable population. The food security situation of the low income people has deteriorated with the high levels of staple food prices.
Record harvests of 2011 paddy crop, Boro, Aus and Aman seasons, is estimated

In spite of the localized flooding which affected many low-lying areas in the coastal south-west, south-central and the northern regions, the 2011 Aman season production is forecast to reach record levels. The Government has revised production forecast of the 2011 Aman season paddy crop to a new record at 31.8 million tonnes, an increase of about 4.0 percent over the previous year’s bumper harvest of the corresponding season. On average Boro, Aman and Aus seasons account for 56, 38 and 6 percent, respectively, of the annual paddy production. FAO puts the 2011 annual paddy output, including forecast output of Aman season, at a record level of about 51.9 million tonnes (equivalent to 34.6 million tonnes of milled rice), some 3.2 percent above last year’s another record output.

Similarly, wheat production, estimated at about 1.1 million tonnes showed a 13 percent increase compared to the previous year. A combination of a favourable climatic conditions and high yielding variety seeds were the main factors responsible for the increase.

According to the final FAO estimate, another record aggregate cereal production should be obtained in 2011 at 54.2 million tonnes. The record harvests are expected to reduce the total cereal import requirements during 2011/12 marketing year (July/June).

Rice prices decrease slightly in October while wheat prices continue to rise

Rice prices had remained unchanged in the past three month but declined slightly in October. The recent decrease in the domestic retail market could be explained by satisfactory Aman and Aus paddy production, as well as the release of stocks by traders in anticipation of a bumper harvest in November-December. Government sales under various subsidy programs have also had an impact on the rice prices. However, prices in October were only 9 percent below the peak of January 2011 and 2 percent below the high levels of a year ago. Prices of wheat flour increased for the second consecutive month in October after a slowdown of imports by the private sector. Nonetheless, the retail wheat flour price in Dhaka in October was about 2 percent below the level of a year earlier.

The year-on-year monthly food price inflation is still quite high and was estimated at 11.3 percent in August which showed a small decrease from the month earlier.

Localized food insecurity persists
According to the local administration around 1.3 million people were severely affected and became homeless owing to the floods. About 26 709 hectares of standing crops were damaged in 18 of the 64 districts. Reportedly, damage to poultry and livestock sector and agricultural infrastructure also occurred, with a loss of some 861 000 animals. Furthermore, the affected population has suffered loss of assets including houses, garden produce, grain stocks and agricultural infrastructure.

The deteriorating situation has lead to international appeals for food and agricultural assistance for the vulnerable population. The food security situation of the low income people has deteriorated with the high levels of staple food prices.

![Bangladesh Total cereal imports](chart)

**Bangladesh Total cereal imports**

- Bar chart showing total cereal imports in tonnes for the years 2006/07, 2010/11, and 2011/12 forecast.

- **Average 2006/07-2010/11**: 3953 tonnes
- **2010/11**: 5503 tonnes
- **2011/12 forecast**: 3259 tonnes

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

*Source: FAO/GIEWS Country Cereal Balance Sheets*

![Bangladesh Retail cereal prices in Dhaka](chart)

**Bangladesh Retail cereal prices in Dhaka**

- Line chart showing retail cereal prices in Dhaka from October 2009 to October 2011.

- **Rice (coarse)**
- **Wheat (flour)**

*Source: Department of Agriculture Marketing (DAM), Bangladesh*
GIEWS Country Brief

Bangladesh

Reference Date: 30-May-2011

FOOD SECURITY SNAPSHOT

- Good harvest of 2011 Boro paddy and winter wheat
- Rice and wheat prices have come down in recent months
- Localized food insecurity persists

Good harvests of 2011 Boro paddy and winter wheat estimated

The main crops currently harvested are the irrigated Boro rice and wheat. Boro is the main season for rice, accounting for about 50 percent of total annual production. This year’s Boro paddy harvest is estimated at a record level of about 19 million tonnes, some 1.6 percent above last year’s bumper output. Generally adequate irrigation supplies coupled with distribution of subsidized fertilizer, quality seeds, and electricity power and diesel for irrigation, were responsible for the increase. Similarly, winter wheat crop is also estimated at a good level of 1 million tonnes.

Record cereal production in 2010

According to the official statistics, another record aggregate cereal production was obtained in 2010 at 52.3 million tonnes including 50.3 million tonnes of paddy (or 33.5 million tonnes of milled rice). Total cereal increase of about 5 percent in 2010 over the year before is in line with a historical positive trend since 2001. Owing to good domestic production and some stock build-up, total cereal import requirements during 2011 are expected to be lower than the annual imports in previous five years.

Rice and wheat prices have come down since the beginning of 2011

National average price of coarse rice, that in February 2011 had surpassed the past peak achieved in July 2008, have been decreasing in the past three months following the arrival of the new crop into the markets. Despite the declines occurred in recent months, prices of rice in May remained 30 percent above their levels of a year ago. Similarly, prices of wheat have declined in the past few months following significant imports, but remain 20 percent up from their levels of May 2010.

Localized food insecurity persists

The lingering effects of frequent natural disasters including the drought during early 2010, rat infestation in remote Chittagong Hill Tracts in south-eastern parts of the country, cold wave during the winter months, and other localized problems have lead to international appeals for food and agricultural assistance for the vulnerable populations. The food security situation of the low income people has deteriorated with the high levels of staple food prices.
Bangladesh

Total cereal imports

000 tonnes

<table>
<thead>
<tr>
<th></th>
<th>2006/07-2010/11</th>
<th>2010/11</th>
<th>2011/12 forecast</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average</td>
<td>3670</td>
<td>4650</td>
<td>2750</td>
</tr>
</tbody>
</table>

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

Bangladesh

Retail cereal prices in Dhaka

Taka per kg

Source: Department of Agriculture Marketing (DAM), Bangladesh

GIEWS global information and early warning system on food and agriculture
GIEWS Country Brief

Bangladesh

Reference Date: 11-February-2011

Food Security Snapshot
- 2010 paddy and aggregate cereal harvests are estimated at record levels.
- In spite of bumper production cereal prices continue to rise.
- Localized food insecurity persists due to natural disasters and rising food price inflation.

Record cereal harvest in 2010
The paddy crop of the Aman season harvested in November-December is estimated at a record level of 18.8 million tonnes. Including the total harvest of the three seasons, the 2010 annual paddy production is estimated at a record level of 50.3 million tonnes, about 4 percent higher than the previous year's record crop. The 2010 severe hydrological drought notwithstanding, the adequate irrigation promoted by distribution of electricity and diesel coupled with availability of subsidized fertilizer and quality seeds resulted in the significant increase in the Boro season production. On average Boro paddy production accounts for about 57 percent of the annual output. The Aman and Aus seasons account for 38 and 5 percent, respectively. The 2010 winter wheat crop was also estimated at a good level of about 0.9 million tonnes, some 6 percent increase over the previous year.

Currently the 2011 country’s main crop, irrigated Boro paddy planted in January and winter wheat crop planted during November to January are growing under normal conditions.

As a result of the improved harvests in 2010, the cereal imports in 2010/11 marketing year (July/June) are expected to decline to by about 1 million tonnes from the 4.2 million tonne level of 2009/10.

Food prices continue their upward trends
In spite of a record cereal harvest the country remains a net importer of wheat and rice. Thus the domestic prices of these commodities are influenced by the international prices. Sharp price increases in rice and wheat are especially experienced since mid-2010. Prices have been also supported by low levels of public stocks as a result of reduced government procurements in the 2010 “Boro” season. In order to secure enough food stocks and to stabilize markets, Bangladesh announced plans to import nearly 900,000 tons of rice till June this year. Similar to rice, due to the the rising international prices, domestic prices of wheat have kept a general upward trend since August 2010. January 2011 prices of wheat and rice in Dhaka were about one-third higher than their corresponding levels a year ago. The wheat price is still 13 percent below the peak of July 2008 but rice price has almost reached the earlier peak.

Localized food supply and market access difficulties persist
The drought experienced during earlier in 2010 did not affect the overall national food production. It did, however, lead to severe drinking water shortages in many communities including in the capital city of Dhaka.

GIEWS global information and early warning system on food and agriculture
Also, reportedly rat infestation in remote Chittagong Hill Tracts in southeastern Bangladesh has made more than 40,000 people food insecure. Cyclone Aila that hit south western coastal districts in May 2009 had affected more than 3.9 million people. The lingering effects of natural disasters including recent cold wave have lead to international appeals for food and agricultural assistance for the vulnerable populations. The food security situation of vulnerable groups could further deteriorate with the continuing escalation of staple food prices and needs to be monitored closely.
Good harvest of 2010 Boro and Aus paddy and winter wheat crops estimated

The country’s main crop, irrigated Boro paddy was harvested in April-May. The minor season Aus paddy has now been gathered as well. Including forecast of Aman paddy, just been planted, the 2010 forecast by FAO indicates a 3 percent increase in total paddy production. This is in line with the steady growth of past several years. On average Boro, Aus and Aman seasons account for 57, 5 and 38 percent, respectively, of the annual paddy production. In spite of the severe hydrological drought in the country, adequate irrigation supplies coupled with distribution of subsidized fertilizer, quality seeds, and electricity power and diesel for irrigation, were responsible for the increase in the Boro season production. Similarly, winter wheat crop is also estimated at a good level of about 1 million tonnes.

Cereal imports reached a highest level of 4 million tonnes in 2009/10 marketing year (July/June).

Rice prices increased sharply in the past months

Prices of staple food rice, that had been rising since September 2009 from pre-2008 food-crisis levels rose markedly since June. By mid-August, the national average price of coarse rice was quoted at 28.89 taka/kg, 12 percent higher than in May but still 10 percent below its peak of April 2008. Prices have been supported by the increase in the Government’s procurement price on 1st July (from 25 to 28 Tk/kg) as an incentive for millers to meet its procurement target of 1.2 million tonnes of milled rice from the 2010 Boro season.

Localized food supply and market access difficulties persist

The drought experienced during earlier this year did not affect the overall national food production. It did, however, lead to severe drinking water shortages in many communities including in the capital city of Dhaka. Also, reportedly rat infestation in remote Chittagong Hill Tracts in south-eastern Bangladesh has made more than 40 000 people food insecure. Cyclone Aila hit south western coastal districts of Bangladesh in May 2009, triggering tidal surges and floods. The cyclone affected more than 3.9 million people. Food and agricultural assistance are still needed. The food supply situation of vulnerable groups could further deteriorate with the recent increasing trend in food prices.
FOOD SECURITY SNAPSHOT

- Good harvest of 2010 Boro paddy and winter wheat crops estimated
- Food prices have been rising since late-2009 after having returned to pre-food crisis levels
- Localized food insecurity persist

Good harvest of 2010 Boro paddy and winter wheat crops estimated

The main crops currently harvested are the irrigated Boro rice and wheat. Boro is the main season for rice, accounting for about 50 percent of total annual production. This year’s output is estimated at about 28.5 million tonnes of paddy, some 3 percent above last year’s level. In spite of the severe hydrological drought in the country, adequate irrigation supplies coupled with distribution of subsidized fertilizer, quality seeds, and electricity power and diesel for irrigation, were responsible for the increase. Similarly, winter wheat crop is also estimated at a good level of 1 million tonnes.

Bumper paddy production in 2009

The aggregate output of paddy in 2009 is estimated at a record level of nearly 50 million tonnes and is in line with a historical positive trend. Good production notwithstanding, the rising population and increasing per capita cereal consumption is estimated to result in an increase of cereal imports for 2009/10 July/June marketing year.

Food prices have been rising since late-2009 after returning to pre-food price crisis level

Food staple prices have been steadily rising since October 2009 after reaching and stabilizing at the pre-2008 food crises levels. Low retail price of rice is a reflection of the subsidized distribution of rice in many targeted areas.

Localized food supply and market access difficulties persist

This year’s drought, although did not affect the overall national food production, has led to severe drinking water shortages in many communities including in the capital city of Dhaka. Also, reportedly rat infestation in remote Chittagong Hill Tracts in south-eastern Bangladesh has made more than 40 000 people food insecure. Cyclone Aila hit south western coastal districts of Bangladesh in May 2009, triggering tidal surges and floods. The cyclone affected more than 3.9 million people. Food and agricultural assistance are still needed. The food supply situation of vulnerable groups could further deteriorate with the recent increasing trend in food prices.
Bangladesh
Retail cereal prices
Taka per kg

Source: Management Information System and Monitoring
GIEWS Country Brief
Bangladesh

Reference Date: 14-January-2010

FOOD SECURITY SNAPSHOT
• Bumper cereal crop in 2009
• Good paddy crop expected from current Boro season
• Overall cereal supply situation satisfactory
• Grain prices declined to pre-2008 food-crisis levels although are on the increase in the past two months
• Localized food shortage persist

Bumper paddy crop gathered in 2009
Harvesting of the 2009 Aman monsoon paddy crop, planted in June/July was completed October. The output (in milled terms) is tentatively estimated at some 11.53 million tonnes, which is slightly below the record level of the previous year, but well above the five-year average. Harvesting of the Boro and Aus, were completed earlier in 2009. In aggregate the 2009 rice output is estimated at 30.83 million tonnes (milled terms), 1.6 percent below the record in the previous year, and 10.7 percent over the five-year average.

The 2009 wheat output harvested last April was estimated at 0.95 million tonnes, higher than the previous year’s average production of 0.92 million tonnes and similar to the past five year’s average level.

Good Boro paddy crop expected in 2010
The main crops currently in the ground are irrigated Boro rice and wheat crops. Boro is the main season for rice, accounting for about 50 percent of total annual production. This year’s output is forecast to increase from the good level of same season in 2009, reflecting the government support to ensure balanced fertilizer supply, distribution of quality seeds and uninterrupted power and diesel supply for irrigation.

Overall cereal supply situation satisfactory
The food supply situation at national level is satisfactory. The country had two bumper cereal outputs in 2008 and 2009, as a result of good weather and strong government support. The total cereal import requirement in marketing year 2009/10 is forecast at 2.35 million tonnes, compared to 3.35 million tonnes in the previous year.

Food prices returned to pre-food price crisis level
Food staple prices have declined to the pre-2008 food-crisis levels. The retail price of rice (national average) has increased slightly in the past three months reaching 24.71 Taka/kg in January 2010. However, at this level prices are 23 percent below their peak in April 2008 and 14 percent below that in January 2008. The retail price of wheat (national average) has also gone up slightly in recent months and by January 2010 was at 17.51 Taka/kg, 44 percent below the highest level of August 2008.

Localized food supply and market access difficulties persist
Cyclone Aila hit south western coastal districts of Bangladesh in May 2009, triggering tidal surges and floods. The cyclone has affected more
than 3.9 million people. Food and agricultural assistance are still needed. The food supply situation of vulnerable groups could further deteriorate with the recent increasing trend in food prices.
FOOD SECURITY SNAPSHOT

- Favourable 2009 crop prospects
- Overall cereal supply situation satisfactory
- Grain prices declined to the pre-2008 food-crises levels
- Localized food shortage persist

Record cereal crop forecast for 2009

The main crop currently in the ground is the rice aman/monsoon paddy crop, planted in June/July for harvest from October. The monsoon rains since 1 June have been close to average in most parts of the country. Harvesting of the aus crop, the smallest paddy crop, was completed in August and harvest of the boro crop was completed in May. Outputs were estimated above average. The 2009 aggregate paddy output is expected to reach a record level, mainly reflecting increased government input subsidies.

The 2009 wheat output harvested earlier this year is estimated at 0.95 million tonnes, higher than last year’s average production of 0.92 million tonnes and similar to the past five year’s average level.

Overall cereal supply situation satisfactory and grain prices fall to the pre-2008 food-crises levels

The food supply situation at national level is satisfactory. The country had a record cereal production of 33.3 million tonnes in 2008 and expects to have another bumper output in 2009, forecast at 33.5 million tonnes, reflecting good weather and strong government support. The total cereal import requirement in marketing year 2009/10 is forecast at 2.45 million tonnes, compared to 3.33 million tonnes in the previous marketing year. Bangladesh lifted the ban on exports of fine rice last September after the 2008 bumper harvest and a surge in domestic stocks.

Food prices return to pre-food price crisis level

Food staple prices have declined to the pre-2008 food-crises levels. The retail price of rice (national average) was 19 rupee/kg in September 2009, 40 percent below the peak in April 2008 and 12 percent below that in September 2007. The retail price of wheat flour (national average) was reported at 15.3 Rupee/kg in September 2009, 51 percent below that in September 2008 and 35 percent below the same month two years ago. Both rice and wheat prices are the levels close to those in 2006.
Localized food supply and market access difficulties persist

Bangladesh suffered from widespread monsoon floods, followed by the severe Cyclone Sidr, resulting in the loss of an estimated 1.4 million tonnes of Aman rice in 2007. Food and agricultural assistance are still needed in the worst affected areas. The food supply situation of vulnerable groups has been further adversely affected by soaring food prices last year.

Cyclone Aila hit parts of coastal Bangladesh and eastern India in late May this year, triggering tidal surges and floods. The destruction of around 220,000 mud and bamboo houses and damaged of another 300,000 was reported. Tens of thousands of acres of crops were also reportedly damaged.