



GIEWS Country Brief Madagascar

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FOOD SECURITY SNAPSHOT

- Low cereal harvests in south, but at national level rice production forecast above-average in 2022
- National supplies of rice, country's key food staple, estimated satisfactory in 2022/23, but tight availabilities in droughtstricken southern regions
- Rice prices increased moderately, while food prices more broadly increased at faster pace
- Food insecurity foreseen to worsen in southern regions, amid low harvests, increased food prices and persisting high rates of poverty

Drought conditions kept cereal harvests in south at low levels in 2022

Drought conditions in the highly food-insecure southern regions, which have experienced five consecutive years of low food harvests (2016-2021), kept cereal production at average to below-average levels in 2022. With cereal crops already harvested by June, root and tuber crops will be harvested in August and production is also foreseen at reduced levels in southern and southwestern regions.

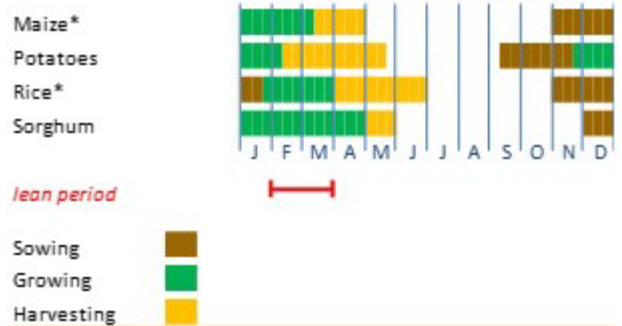
In southern regions of Androy, Anosy, Atsimo Atsinanana and Atsimo Andrefana, monthly rainfall amounts between the start of the planting period in October 2021 and the beginning of the harvest in March 2022 were consistently below the long-term average, curbing yields. These drier-than-average months were punctuated by a period of abundant rainfall in February 2022, caused by tropical cyclones Batsirai and Emnati. Despite some improvement in pasture and crop development, the abundant rains were too late to have a materially positive impact on crops and the intensity of the weather events also led to crop damage. The high levels of poverty and households' structural vulnerability severely limits farmers' ability to mitigate the adverse impact of extreme weather events on agricultural production, contributing to the current high levels of food insecurity. To help address these challenges, in cooperation with the government, FAO distributed sorghum seeds, a more drought-tolerant cereal compared to maize, to 50 000 farming households in five districts in Androy and Anosy. This intervention contributed to keeping the 2022 cereal production at near-average levels in the targeted areas.

Pending the release of official estimates, the 2022 national production of rice, the country's key food staple, is expected to remain above the five-year average. The overall good expectations reflect generally conducive weather conditions in the main

Madagascar

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Madagascar

Cereal Production

	2017-2021 average	2021	2022 forecast	change 2022/2021
	000 tonnes			percent
Rice (paddy)	3 766	4 318	4 500	4.2
Maize	235	232	215	-7.3
Wheat	3	1	2	100.0
Others	1	1	1	0.0
Total	4 005	4 552	4 718	3.6

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

paddy-producing central regions. However, damage caused by successive tropical cyclones and storms caused crop losses in eastern regions.

Adequate rice supplies foreseen at national level in 2022/23

Opening stocks of rice are estimated to be above average in the 2022/23 marketing year (April/March) and, based on an expected above-average harvest, national rice supplies are foreseen to be at satisfactory levels in 2022/23. Compared to the previous year, import requirements are estimated to decline moderately to a below-average level of 500 000 tonnes.

However, in southern rural areas, availabilities of rice and maize are expected to be tight due to the poor harvests in 2022 as well as in the preceding years.

Rice prices rose modestly, while food inflation expected to increase in second half of 2022

According to the latest data from the Institut National de la Statistique (INSTAT), prices of rice increased by 3 percent year on year in May 2022, lower than the 8 percent estimated for the food subcomponent of the national consumer price index. The comparatively subdued price increases of the country's main food staple reflects the generally adequate domestic supplies and low international benchmark prices, unlike prices of other key cereal commodities that have risen steeply since the onset of the war in Ukraine in February 2022.

However, food prices, including rice, are expected to come under increased inflationary pressure in the near-term, owing to the co-occurrence of an upward revision to fuel prices in July, reflecting high global prices and a depreciation of the national currency between June and July that will increase the spillover effects of the already elevated international prices of foods.

Worsening food security conditions in southern regions

According to the latest IPC analysis (May 2022), the prevalence of food insecurity in the southern regions of Androy, Anosy, Atsimo Atsinanana and Atsimo Andrefana is projected to peak at 2.1 million people by December 2022 until at least March 2023. This figure includes 1.8 million people that are anticipated to face IPC Phase 3 (Crisis) and nearly 0.3 people expected to be facing IPC Phase 4 (Emergency) conditions. Overall, the number of people requiring humanitarian assistance by the end of 2022 is expected to be about 30 percent higher compared to the peak number in 2021.

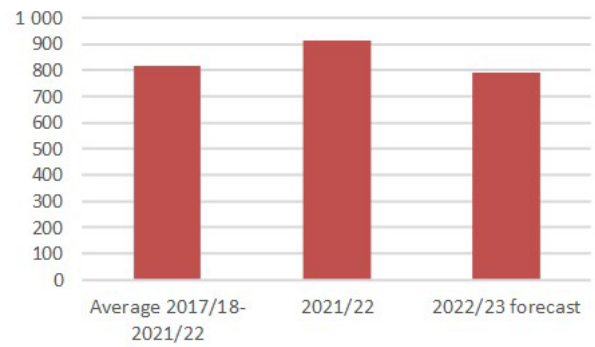
The poor food security situation is mainly the consequence of six consecutive poor agricultural seasons that cumulated in very tight food supplies for rural households and curbed incomes from crop sales. High rates of poverty and increased prices of essential food commodities, combined with a high reliance on market supplies due to low harvests for own consumption, are also contributing to the high rates of food insecurity across the southern regions.

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Madagascar

Cereals Imports

000 tonnes



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

Source: FAO/GIEWS Country Cereal Balance Sheets.