FOOD SECURITY SNAPSHOT

- Favourable weather outlook boosts crop production prospects in 2022
- Despite widespread crop failure in southern regions due to drought conditions, 2021 paddy production estimated at above-average level
- Prices of domestic rice levelled off since April, but higher year on year
- Severe food insecurity conditions in southern regions due to drought and effects of COVID-19 pandemic

Favourable weather outlook boosts crop production expectations in 2022

Planting of the main 2022 season paddy and maize crops is expected to begin in November and the harvest will take place in the second quarter of next year. The minor 2022 season paddy crop, grown in eastern and southeastern areas, has been planted and is to be harvested in December.

Current weather forecasts point to a slightly higher-than-normal likelihood of average to above-average rainfall from October 2021 to March 2022, throughout most of the country, boosting 2022 crop production prospects. Support to agricultural households in southern regions must be scaled up and provided in advance of the start of the season in order to bolster their productive capacity after several years of well below-average harvests.

Small production decline nationally in 2021, widespread crop failure in south

Nationally, the 2021 paddy production is estimated at 4 million tonnes, about 6 percent lower year on year, but still 9 percent higher than the five-year average. The above-average national output reflects mostly favourable weather conditions in the main paddy producing central and northern regions, while adverse weather conditions affected yields in southern and eastern areas. In particular, widespread crop failure occurred in the southern regions of Androy, Anosy and Atsimo Andrefana due to significant seasonal rainfall deficits. The impact of the drought is illustrated by the negative anomalies in vegetation conditions in May 2021 (ASI map) and confirmed by field assessments prior to the harvest period that indicated poor crop conditions. Compared to the previous year, the area sown declined in 2021, owing to a poor start of the rainy
season and weak financial capacities of farmers underpinned by the effects of the COVID-19 pandemic on the economy.

Cereal import requirements to increase slightly in 2021/22

The aggregate import requirement of cereals in the 2021/22 marketing year (April/March) is estimated at about 790 000 tonnes, about 5 percent above both the previous year’s quantity and the five-year average. Import requirements of rice, which account for the largest share of the foreseen import amount, are estimated at 505 000 tonnes in 2021/22, about 4 percent above the previous five-year average. A drawdown in national rice stocks is forecast in 2021/22, limiting import requirements.

Prices of domestic rice stabilized, but at higher year on year levels 2021

Prices of domestic rice increased between November 2020 and March 2021, owing to seasonally tight supplies, but levelled off in the subsequent months. As of July 2021, on average, prices of domestic rice were about 8 percent above year-earlier levels, mainly reflecting the effects of the year-on-year decline of the 2021 output.

Severe acute food insecurity in southern regions

The prevalence and severity of food insecurity increased in 2021 in the southern regions of Androy, Anosy and Atsimo Andrefana, and conditions are projected to worsen by the end of the year. Between April and September 2021, an estimated 1.14 million people, about 43 percent of the analyzed population, are facing acute food insecurity (IPC Phase 3 [Crisis] and above). This number is projected to increase to 1.31 million (49 percent of the analyzed population) between October and December 2021, 24 percent higher on a yearly basis. The projection also indicates an increase in the number of people in the most severe food insecure categories, IPC Phase 4 (Emergency) and Phase 5 (Catastrophe). The population in these categories is currently estimated 0.4 million people, but this number is projected to increase to more than 0.5 million in the last quarter of 2021, of which about 28 000 people (twice the number between April and September 2021) would be in Phase 5 (Catastrophe). Households assessed to be in Phase 5 (Catastrophe) conditions are expected to face the complete lack of food, even after utilizing available coping strategies, and assistance is urgently required to save lives and avoid a collapse of livelihoods.

The primary reasons for the current dire situation and poor outlook are the low cereal harvest obtained in 2021, which cut households’ food availability and curbed incomes from crop sales, and the effects of the COVID-19 pandemic, primarily through a reduction in incomes. These effects have been exacerbated by the chronic high rates of poverty, particularly in southern regions.

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