GIEWS Country Brief
Madagascar

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FOOD SECURITY SNAPSHOT
- Paddy production in 2020 forecast at near-average level
- Cereal import requirements estimated slightly above-average in 2019/20
- Prices of rice in last quarter of 2019 were lower than year-earlier levels due to larger national supplies
- Prevalence of food insecurity expected to remain high in southern regions during first half of 2020

Paddy production in 2020 expected at near-average level

Harvesting of the main 2020 season paddy crop began in April and national production is anticipated at a near-average level.

In most of northern and central regions, weather conditions from the start of the main season in October to early December 2019 generally favoured the development of paddy crops. However, torrential rains in late December in northern areas triggered floods and caused localized crop losses, while an uneven distribution of rainfall in January and February 2020 dampened yield expectations in some of the main paddy-producing areas in the central highlands. Minimal damage to crops was caused by the passage of Tropical Cyclone Herold in mid-March, which brought strong winds and heavy rains to northeastern regions and caused localized floods.

In southern regions, including the rainfed paddy-producing districts in Anosy and Ihorombe, rainfall has been erratic and seasonal totals have been well below average, hindering crop development. Consequently, paddy yields in these areas are forecast to be below average in 2020.

Harvesting of the 2020 maize crop is underway and the output is forecast at a below-average level. The expected low output reflects localized crop losses in the north caused by floods in January and a reduced area sown with maize, as farmers preferred to plant alternative crops that were considered to be less susceptible to attacks by Fall Armyworms.

Cereal import requirements estimated slightly above-average in 2019/20

The aggregate import requirements of cereals in the 2019/20 marketing year (April/March) are estimated at an above-average level of 820,000 tonnes. Despite the rebound in paddy production in
2019, import requirements of rice, which account for the largest share of cereal imports, are forecast at 450 000 tonnes in 2019/20, 15 percent above the average, as the country seeks to replenish its stocks and buffer domestic availabilities following two consecutive years of below-average paddy harvests.

**Prices of rice in last quarter of 2019 were lower than year-earlier levels due to larger national supplies**

In line with the seasonal trends, prices of imported and local rice varieties increased between July and November 2019 and remained stable in December when the new supplies from the 2020 minor first season harvest boosted market availabilities. In December, prices of imported and local rice were, on average, about 4 percent lower than one year before, reflecting the overall improved national supply situation following the 2019 bumper harvest. Stable exchange rates and international prices of rice contributed to limit imported inflation in 2019 and lessened the upward pressure on domestic rice prices.

**Prevalence of food insecurity projected to remain high in southern regions during first half of 2020**

The number of people experiencing acute food insecurity in early 2020 is estimated to have declined by almost 30 percent compared to the corresponding period of the previous year, mainly due to improved domestic availabilities of staple foods (rice, maize and cassava) and lower prices of cereals. However, according to the latest IPC acute food insecurity analysis, in southern and southeastern regions still an estimated 415 000 people were projected to be in IPC Phase 3: “Crisis” and Phase 4: “Emergency” during the April-June 2020 period. This localized high prevalence is mainly due to limited availability and access to food, owing to reduced cereal production and limited income-earning opportunities for rural households in southern regions.

The risk posed by the COVID-19 pandemic, both through the negative impacts associated with a reduction in economic activities and the potential adverse effects on localized supply levels, is an additional concern for food security across the country. An updated assessment of the food insecurity situation is expected to be available by the end of April and will provide estimates on the number of people assessed to be facing IPC Phases 3 and 4.
COVID-19 and measures adopted by the Government

In response to the COVID-19 pandemic, all national borders were closed for a period of 30 days from 19 March 2020 and quarantine restrictions were implemented in the two main cities of Antananarivo and Toamasina from 23 March and in Fianarantsoa from 5 April. These containment measures, however, have not been applied to individuals within the agriculture and food supply chains. For example, agricultural labourers are exempt from travel restrictions and the movement of food and agricultural inputs are permitted.

To temper the potential excessive price movements, a price ceiling has been established for rice products, set at MGA 1 800/kg. In addition, the Government has expanded a pre-existing food subsidy programme through the establishment of new distribution points that will increase the geographic coverage. Furthermore, a new food assistance initiative will distribute 240 000 baskets of basic food items to persons that have been assessed to be most vulnerable to the impact of quarantine measures.

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