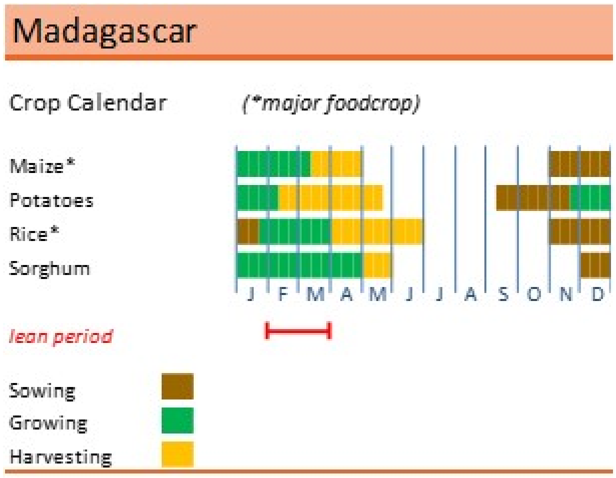
# GIEWS Country Brief
## Madagascar

**Reference Date: 10-July-2020**

**FOOD SECURITY SNAPSHOT**
- **Paddy production in 2020 is forecast at near-average level**
- **Cereal import requirements are estimated slightly above-average in 2020/21**
- **Prices of rice are currently slightly higher than year-earlier levels**
- **Over half a million people were estimated to be food insecure in southern regions during the first half of 2020, however this figure does not include analysis of the COVID-19 pandemic's impact on food security**



Source: FAO/GIEWS.

### Madagascar
**Cereal Production**

| | 2015-2019 average | 2019 | 2020 forecast | change 2020/2019 |
|---|---|---|---|---|
| | 000 tonnes | | | percent |
| Rice (paddy) | 3 564 | 3 911 | 3 720 | -4.9 |
| Maize | 272 | 220 | 205 | -6.8 |
| Wheat | 5 | 5 | 5 | 0.0 |
| Others | 1 | 1 | 1 | 0.0 |
| Total | 3 842 | 4 137 | 3 931 | -5.0 |

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheet.

## Paddy production in 2020 is forecast at a near-average level

Harvesting of the 2020 main paddy crop is nearly complete and the national output is preliminary forecast at a near-average level of 3.7 million tonnes, 8 percent below the previous year's bumper outturn. The expected production decline, which might be larger than initially anticipated due to pending revisions of crop loss estimates, reflects erratic and below-average cumulative rainfall that curtailed plantings and dampened yields in the southern regions of Anosy and Ihorombe as well as in parts of the central highlands and the western Menabe region. In most of the main paddy-producing northern regions, weather conditions were mostly beneficial. However, some localized crop losses were reported due to the impact of torrential rains in late December and early January, while rainfall shortages towards the end of the season are expected to have curbed yield potentials. Overall, average to above-average paddy harvests in the northern regions are anticipated to partially offset the reduced harvests in the south and centre, resulting in a near-average national output in 2020.

Harvesting of the 2020 maize crop concluded recently and the output is estimated at a well below-average level of 205 000 tonnes. The low output reflects localized crop losses in the north caused by floods in January and low crop productivity in the south, on account of significant rainfall deficits. An estimated contraction in the area sown with maize, reflecting farmers preference to plant alternative crops that were considered to be less susceptible to attacks by Fall Armyworms, further contributed to the reduced output in 2020.

## Cereal import requirements are estimated slightly above average in 2020/21

The aggregate import requirement of cereals in the 2020/21 marketing year (April/March) is estimates at

720 000 tonnes, slightly above the five-year average and similar to the previous year's level. Import requirements of rice, which account for the largest share of the expected import quantity, are estimated at 420 000 tonnes in 2020/21, slightly below the previous five-year average, reflecting sufficient supplies from the bumper harvest in 2019 and adequate stocks.

## Prices of rice rise slightly, but remain stable year on year

Prior to the first case of COVID-19 in the country and the implementation of lockdown measures to contain the spread of the virus in March, prices of rice were generally stable. This reflected an adequate supply situation following the 2019 bumper harvest as well as a generally firm exchange rate and stable international prices of rice that limited imported inflation. As part of measures to abate the impact of the COVID-19 movement restrictions on consumers, the Government introduced a ceiling price on rice products, set at MGA 1 800 per kg. Despite this introduction, there were modest increases in rice prices in the March-May period and prices were about 2 percent higher on a year basis.

## Prevalence of food insecurity is expected to remain high in southern regions during 2020

According to the last IPC analysis released in April 2020, an estimated 554 000 people were projected to be in IPC Phase 3: "Crisis" and Phase 4: "Emergency" during the April-July 2020 period in southern and southeastern regions, about 10 percent above the previous estimate. The higher prevalence of food insecurity mainly reflects the lower availability and access to food, owing to reduced crop production and limited income-earning opportunities for rural households in southern regions.

The likely impacts of the COVID-19 pandemic were not included in the latest estimation and, therefore, the food security situation is expected to be more severe. The containment measures are estimated to have caused disruptions in the food supply chain, adding pressure to food prices especially in the south, as well as constrained domestic migration to find employment outside of the agriculture sector. Due to the widespread reduction in economic activities, remittances from the urban centers to southern areas are also expected to have fallen.

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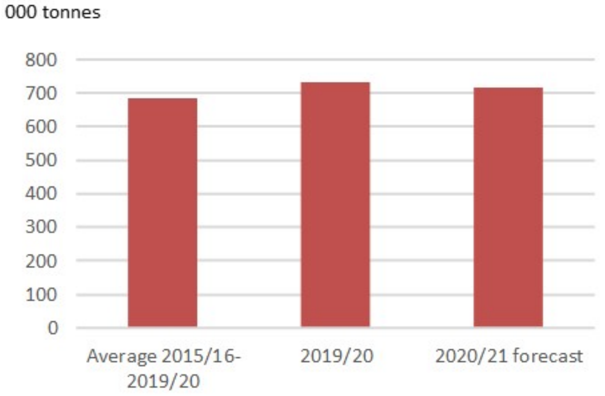
### Madagascar

Cereals Imports




Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).
Source: FAO/GIEWS Country Cereal Balance Sheets.