



## GIEWS Country Brief Nepal

Reference Date: 13-October-2023

### FOOD SECURITY SNAPSHOT

- Below-average cereal production forecast in 2023
- Cereal import requirements in 2023/24 marketing year forecast at above-average level
- Record high prices of most basic food products in August 2023
- Record high food prices negatively affect food access of most vulnerable households

### Below-average cereal production forecast in 2023

Harvesting of 2023 maize crops is nearing completion, while the bulk of the paddy harvest is expected to start in mid-October. Production is anticipated to be below the average, as erratic and insufficient seasonal rainfall in some important crop producing areas curtailed both sowings and yields. High prices of agricultural inputs resulted in low application rates of fertilizers and pesticides, with negative effects on yields. Rice and maize outputs are forecast at below-average levels of 5.3 million tonnes and 2.8 million tonnes, respectively. Production of wheat, harvested last June, is officially estimated at average level of 2.1 million tonnes.

According to weather forecasts, there will be a high likelihood of below-average precipitation between October and December 2023 in eastern parts of the country that may hinder planting operations and establishment of 2024 wheat crops. By contrast, precipitation is forecast to be above average in western parts of the country, with likely positive effects on crops.

### Cereal import requirements in 2023/24 marketing year forecast at above-average level

In the past five years, cereal imports, mostly rice, covered about 15 percent of the national consumption requirements and most imports were sourced from India. Cereal import requirements in the 2023/24 marketing year (July/June) are forecast at an above-average level of 1.75 million tonnes. Rice imports in calendar year 2024 are forecast to rise by 250 000 tonnes year-on-year to 950 000 million tonnes. Wheat import requirements are forecast at an above-average level of 300 000 tonnes, driven by the need to increase market availability mainly due to strong local demand and sharply reduced imports since the [export ban](#) by India in May 2022. Imports of maize are expected a near-average level of 500 000 tonnes.

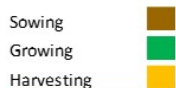
### Nepal

Crop Calendar

(\*major foodcrop)



Lean period



### Nepal

#### Cereal Production

	2018-2022 average	2022	2023 forecast	change 2023/2022
	000 tonnes			percent
Rice (paddy)	5 480	5 486	5 300	-3.4
Maize	2 931	3 000	2 800	-6.7
Wheat	2 082	2 145	2 090	-2.5
Others	354	361	367	1.8
<b>Total</b>	<b>10 847</b>	<b>10 992</b>	<b>10 557</b>	<b>-4.0</b>

Note: Percentage change calculated from unrounded data.

## Record high prices of most basic food products in August 2023

Retail prices of rice increased sharply in the first quarter of 2023, reflecting high domestic production and transport costs. After some declines, prices reached record levels in August due to expectations of a reduced 2023 domestic production.

Retail prices of wheat flour steadily increased in the second part of 2022 and reached record levels in January 2023, mostly driven by tight market availability ahead of the 2023 harvest and due to reduced imports since May 2022. High production and transport costs also supported prices. Prices declined seasonally in the first quarter of 2023 and, after a short-lived increase in July, they dropped by 5 percent month-on-month in August. The price softening followed the Indian government's [approval](#), on 21 June 2023 to export 300 000 tonnes of wheat until April 2024, in response to an earlier request by the Government of Nepal.

## Record food prices negatively affect food access of most vulnerable households

According to a [survey](#) conducted by the World Food Programme (WFP) in April 2023, about 4.26 million people<sup>1</sup> (14.6 percent of the total country's population) were not consuming an adequate diet, mainly due to record high food prices and reduced income linked to the slowdown of the national economy in 2022. For the remainder of 2023, concerns on the access to food persist as prices stand at high levels and purchasing power of the most vulnerable households is generally low, amid high inflation. According to the National Statistics Office, the food inflation rate was estimated at 9 percent in August 2023.

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This brief was prepared using the following data/tools:

FAO/GIEWS Country Cereal Balance Sheet (CCBS) <https://www.fao.org/giews/data-tools/en/>.

FAO/GIEWS Food Price Monitoring and Analysis (FPMA) Tool <https://fpma.fao.org/>.

FAO/GIEWS Earth Observation for Crop Monitoring <https://www.fao.org/giews/earthobservation/>.

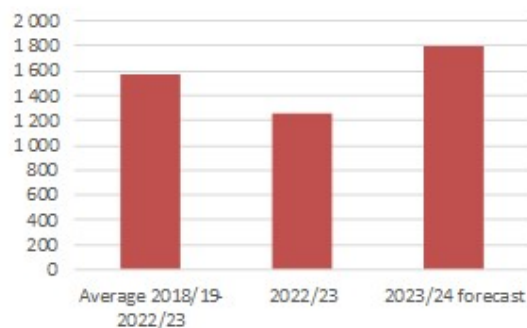
Integrated Food Security Phase Classification (IPC) <https://www.ipcinfo.org/>.

<sup>1</sup> This estimate is based on the Food Consumption Score (FCS) indicator which measures dietary diversity and food frequency. A household food consumption score is calculated according to the types of foods consumed during the previous seven days, the frequencies with which they are consumed and the relative nutritional weight of the different food groups.

## Nepal

### Cereals Imports

000 tonnes

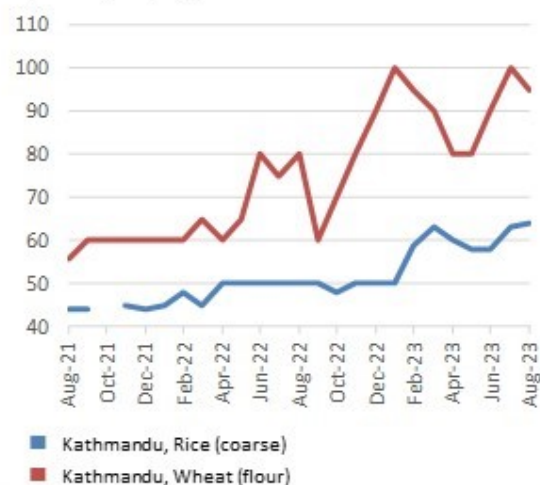


Notes: Includes rice in milled terms. Split years refer to individual crop marketing years (for rice, calendar year of second year shown).

## Nepal

### Retail prices of rice and wheat

Nepalese rupee per kg





# GIEWS Country Brief Nepal

Reference Date: 06-May-2022

## FOOD SECURITY SNAPSHOT

- Shortages and high prices of fertilizers and fuel raise concerns for performance of 2022 crops
- Average cereal production obtained in 2021
- Cereal import requirements in 2021/22 marketing year forecast at above-average level
- Food security improved after start of COVID-19 pandemic

## Shortages and high prices of fertilizers and fuel raise concerns for performance of 2022 crops

Harvesting of the 2022 mostly irrigated wheat crop is ongoing in the southern parts of the country, while in the north crops are still at grain filling stage and the harvest is expected to start in early May. Heavy rains in mid-October caused floods in western and eastern provinces, delaying planting activities by about two weeks. Weather conditions were generally favourable from November onwards and, together with adequate supplies of irrigation water, supported crop establishment and development. However, there are concerns on the final yields due to a reduced application of fertilizers (mostly imported), caused by their high prices and limited availability.

Planting operations of the 2022 maize crop are ongoing and will finalize in mid-May, while planting of the paddy crop, the country's main staple, will start at the end of May. Concerns exist that farmers' planting intentions may be negatively affected by the high prices of fertilizers and fuel.

## Average cereal production obtained in 2021

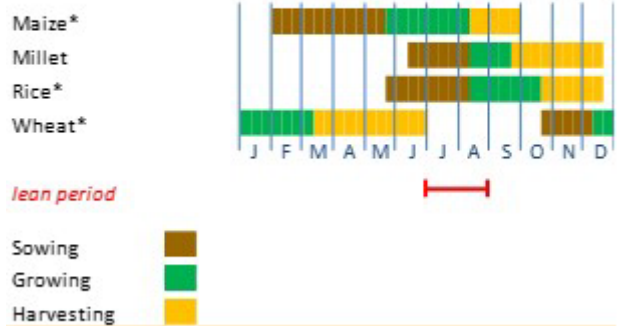
Harvesting of the 2021 season crops finalized last December and the aggregate cereal production is estimated at average of 10.3 million tonnes.

Paddy production, which accounts for the bulk of the country's cereal output, is estimated at 5.1 million tonnes, down 9 percent from the 2020 level, due to reduced yields following unseasonal rains and floods last October that affected crops almost ready to be harvested. The 2021 maize output is estimated at an above-average level of 2.7 million tonnes, reflecting extended plantings driven by the strong demand of the feed industry and above-average yields, supported by favourable weather conditions. The 2021 wheat output is estimated at a bumper level

## Nepal

Crop Calendar

(\*major foodcrop)



Source: FAO/GIEWS, FAO/WFP CFSAM 2007.

## Nepal

### Cereal Production

	2016-2020 average	2020	2021 estimate	change 2021/2020
	000 tonnes			percent
Rice (paddy)	5 433	5 622	5 131	-8.7
Maize	2 625	2 720	2 700	-0.7
Wheat	1 951	2 185	2 090	-4.4
Others	346	351	360	2.5
<b>Total</b>	<b>10 355</b>	<b>10 878</b>	<b>10 281</b>	<b>-5.5</b>

Note: Percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

of 2.1 million tonnes, owing to above-average levels of both area planted and yields.

## Cereal import requirements in 2021/22 marketing year forecast at above-average level

Cereal import requirements for the 2021/22 marketing year (July/June) are forecast at an above-average level of 2.3 million tonnes. Rice imports in calendar year 2022 are forecast at 1.35 million tonnes, up 13 percent from 2021 levels. Imports of maize are forecast close to average at 400 000 tonnes, while imports of wheat are expected to more than double the average levels at 500 000 tonnes due to the strong local demand for bread and bakery products.

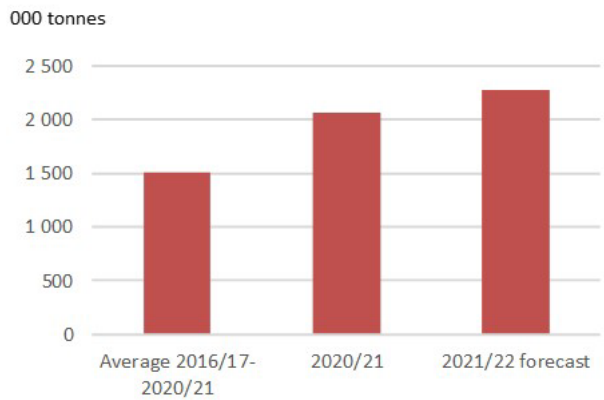
## Food security situation improved after start of COVID-19 pandemic

Since April 2020, WFP conducted five surveys to assess the impact of the COVID-19 pandemic on livelihoods and households' food insecurity in the country. According to the results of the latest [October 2021 survey](#), the overall food security conditions improved compared to 2020 and the first part of 2021. However, the limited economic growth will likely continue to negatively affect livelihoods and income generating activities. Food insecurity concerns exist for an estimated 2.8 million food insecure people, accounting for about 10 percent of the total population, mostly concentrated in the remote northern parts of far- and mid-western mountainous regions. These regions are characterized by low agricultural productivity and poorly functioning markets that limit access to food for the most vulnerable population. In addition, the expected decrease in agricultural output in 2022 is likely to affect farmers and casual labourers, due to a reduction of income and employment opportunities.

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## Nepal

### Cereals Imports



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.





# GIEWS Country Brief Nepal

Reference Date: 08-January-2021

## FOOD SECURITY SNAPSHOT

- Area planted with 2021 wheat crop estimated at above-average level
- Cereal production in 2020 close to record level
- Near-average cereal import requirements forecast for 2020/21 marketing year (July/June)
- Monsoon floods and COVID-19 pandemic heighten food insecurity

### Area planted with 2021 wheat crop estimated at above-average level

Planting of the 2021 mostly irrigated wheat crop, for harvest next March, has just concluded. Favourable weather conditions since the beginning of October and ample supplies of irrigation water, following above-average May to September monsoon rains, supported planting activities and benefitted crop germination. The area planted is estimated at an above-average level, driven by strong local demand.

### Cereal production in 2020 close to record level

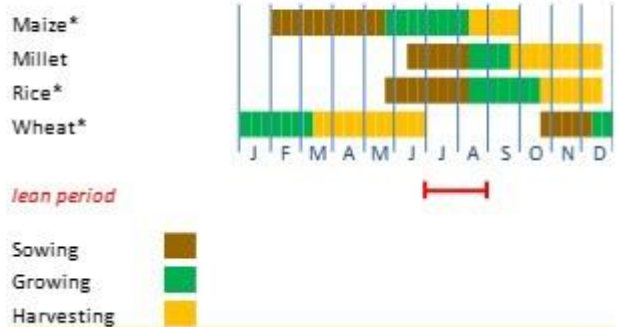
Harvesting of the 2020 main season crops, mostly rice and maize, has just concluded. The 2020 paddy production is estimated at a near-record level of 5.6 million tonnes, reflecting the high level of plantings. Localized damages to standing crops were reported in western and central parts of the country due to floods following heavy rains in June and late September. The 2020 maize output is estimated at a record level of 2.7 million tonnes, continuing the steady increase observed during the last eight consecutive years, supported by high level of plantings driven by strong demand of the feed industry. The 2020 wheat output, harvested in June, is estimated at a bumper level of 2.2 million tonnes, owing to above-average levels of both area planted and yields. Overall, the 2020 aggregate cereal production is estimated at about 10.8 million tonnes, similar to the 2019 record level.

### Near-average cereal import requirements forecast for 2020/21 marketing year

Cereal import requirements for the 2020/21 marketing year (July/June) are forecast at a near-average level. Rice (refers to calendar year 2021) and maize imports are expected to reach 740 000 and 400 000 tonnes, respectively. Wheat imports are forecast at 100 000 tonnes, well below the five-year average, reflecting bumper outputs for two consecutive years.

## Nepal

Crop Calendar (\*major foodcrop)



Source: FAO/GIEWS, FAO/WFP CFSAM 2007.

## Nepal

### Cereal Production

	2015-2019 average	2019	2020 estimate	change 2020/2019
	000 tonnes			percent
Rice (paddy)	5 168	5 551	5 621	1.3
Maize	2 483	2 650	2 700	1.9
Wheat	1 953	2 200	2 200	0.0
Others	344	352	352	0.0
<b>Total</b>	<b>9 948</b>	<b>10 753</b>	<b>10 873</b>	<b>1.1</b>

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

## Monsoon floods and COVID-19 pandemic heighten food insecurity

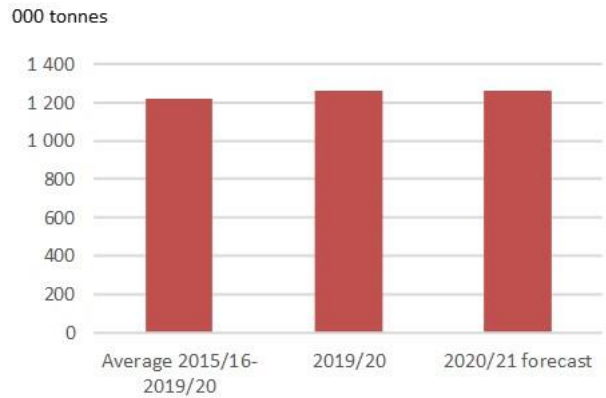
The overall food security situation is good, following four consecutive years of bumper harvests. Concerns remain for an estimated 2.8 million food insecure people, accounting for about 10 percent of the total population, mostly concentrated in the remote northern parts of far-western and mid-western mountainous regions. In these regions, generally low agricultural productivity and poorly functioning markets limit the access to food for the most vulnerable population. However, the number of food insecure people is on the rise due to income losses associated with the COVID-19-related economic downturn and a decrease in remittances. Since May 2020, UNICEF conducted several surveys, called “Child and Family Tracker”, to assess the impact of the COVID-19 pandemic on children and their families. According to the results of the August survey, over 60 percent of the interviewed households reported significant losses of income and 25 percent of the households had inadequate access to food.

Heavy monsoon rainfall in June and September 2020 caused flooding and landslides in few parts of the country, hitting particularly the Gandaki and Bagmati provinces. According to the Nepal Disaster Risk Reduction Portal, the floods and landslides affected about 65 000 families and caused losses of lives, damage to housing and infrastructure.

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## Nepal

### 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.



# GIEWS Country Brief Nepal

Reference Date: 23-December-2020

## FOOD SECURITY SNAPSHOT

- Area planted with 2021 wheat crop estimated at above-average level
- Cereal production in 2020 close to record level
- Near-average cereal import requirements forecast for 2020/21 marketing year (July/June)
- Monsoon floods and COVID-19 pandemic heighten food insecurity

### Area planted with 2021 wheat crop estimated at above-average level

Planting of the 2021 mostly irrigated wheat crop, for harvest next March, has just concluded. Favourable weather conditions since the beginning of October and ample supplies of irrigation water, following above-average May-September monsoon rains, supported planting activities and benefitted crop germination. The area planted is estimated at an above-average level, driven by strong local demand.

### Cereal production in 2020 close to record level

Harvesting of the 2020 main season crops, mostly rice and maize, has just concluded. The 2020 paddy production is estimated at a near-record level of 5.5 million tonnes, reflecting the high level of plantings. Localized damages to standing crops were reported in western and central parts of the country due to floods following heavy rains in June and late September. The 2020 maize output is estimated at a record level of 2.7 million tonnes, continuing the steady increase observed during the last eight consecutive years, supported by the high level of plantings driven by strong demand from the feed industry. The 2020 wheat output, harvested in June, is estimated at a bumper level of 2.2 million tonnes, owing to above-average levels of both area planted and yields. Overall, the 2020 aggregate cereal production is estimated at about 10.8 million tonnes, similar to the 2019 record level.

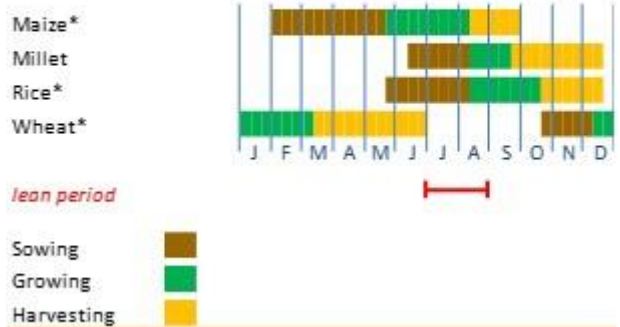
### Near-average cereal import requirements forecast for 2020/21 marketing year

Cereal import requirements in the 2020/21 marketing year (July/June) are forecast at a near-average level of 1.3 million tonnes. Rice (refers to calendar year 2021) and maize imports are expected to reach 740 000 and 400 000 tonnes, respectively.

## Nepal

Crop Calendar

(\*major foodcrop)



Source: FAO/GIEWS, FAO/WFP CFSAM 2007.

## Nepal

### Cereal Production

	2015-2019 average	2019	2020 estimate	change 2020/2019
	000 tonnes			percent
Rice (paddy)	5 168	5 551	5 500	-0.9
Maize	2 483	2 650	2 700	1.9
Wheat	1 953	2 200	2 200	0.0
Others	344	352	352	0.0
<b>Total</b>	<b>9 948</b>	<b>10 753</b>	<b>10 752</b>	<b>0.0</b>

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Wheat imports are forecast at 100 000 tonnes, well below the five-year average, reflecting bumper outputs for two consecutive years.

## Monsoon floods and COVID-19 pandemic heighten food insecurity

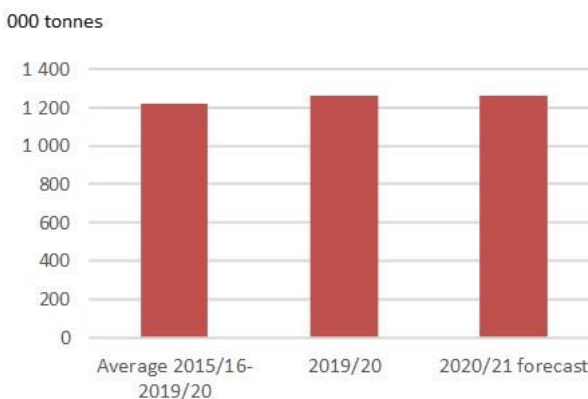
The overall food security situation is good, following four consecutive years of bumper harvests. Concerns remain for an estimated 2.8 million food insecure people, accounting for about 10 percent of the total population, mostly concentrated in the remote northern parts of Far-Western and Mid-Western mountainous regions. In these regions, generally low agricultural productivity and poorly functioning markets limit the access to food for the most vulnerable population. However, the number of food insecure people is on rise due to income losses associated with the COVID-19-related economic downturn and a strong decrease in remittances. Since May 2020, UNICEF conducted several surveys, called “Child and Family Tracker”, to assess the impact of the COVID-19 pandemic on children and their families. According to the results of the August survey, over 60 percent of the interviewed households reported significant losses of income and 25 percent of the households had inadequate access to food.

Heavy monsoon rains in June and September 2020 caused flooding and landslides in many parts of the country, hitting particularly hard the western and central provinces. According to official information, the floods and landslides, affected about 65 000 households throughout the country and caused losses of lives and damaged housing and infrastructure.

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## Nepal

### 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.





## GIEWS Country Brief Nepal

Reference Date: 13-May-2020

### FOOD SECURITY SNAPSHOT

- Favourable production prospects for the 2020 wheat crops
- Cereal production in 2019 estimated at a record level
- Near-average cereal import requirements forecast for 2019/20 marketing year (July/June)
- Overall, food security situation is good

### Prospects for 2020 wheat output favourable

Harvesting of the 2020 wheat crop started in March 2020 in the southern low-lying areas and is expected to finalize by the end of June in the northern hilly areas. Current prospects for the 2020 wheat crop are generally favourable. The area planted is estimated at an above-average level, driven by strong local demand. Since the beginning of the season in October, precipitation amounts have been above average in the southern plains (locally known as Terai Region), which account for more than 60 percent of the total annual wheat production. In the hills and mountains agro-ecological regions, snowfall was adequate during the winter months, protecting crops from freezing temperatures and providing soil moisture during the critical spring months. In addition, adequate supplies of high-yielding seed varieties and fertilizers increased productivity. As of late April, remote sensing data shows above-average vegetation conditions throughout the country (see VHI map), inferring generally favourable yield prospects for the wheat crops.

The 2020 maize crop, for harvest from August onwards, is growing under generally favourable weather conditions. The area planted is estimated at a high level, continuing the steady increase observed during the last eight consecutive years, reflecting the strong demand by the feed industry. Assuming average yields, the 2020 maize output is expected to reach a new record level.

### Cereal production in 2019 estimated at record level

The 2019 cropping season finalized in last December and the aggregate cereal output, including wheat, paddy rice and maize, is estimated at a record level of 10.8 million tonnes.

### Nepal

Crop Calendar

(\*major foodcrop)



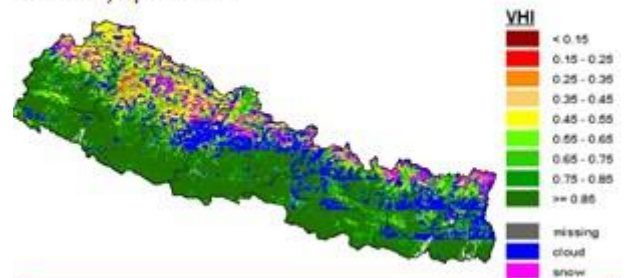
lean period

Sowing  
Growing  
Harvesting

Source: FAO/GIEWS, FAO/WFP CFSAM 2007.

### Nepal - Vegetation Health Index (VHI)

Dekad 3, April 2020



Source: FAO/GIEWS Earth Observation System.

## Near-average cereal import requirements forecast for 2019/20 marketing year

Cereal import requirements in the 2019/20 marketing year (July/June) are forecast at a near-average level of 1.1 million tonnes. Rice (refers to calendar year 2020) and maize imports are forecast at 570 000 and 400 000 tonnes, respectively. Wheat imports, normally accounting for minor quantities, are forecast at a five-year low, in line with the expected bumper output.

## Overall food security situation is good

The overall food security situation is good, following four consecutive years of bumper harvests. However, concerns remain for an estimated 4.6 million food insecure people, accounting for 15 percent of the total population, mostly concentrated in the remote northern parts of Far-Western and Mid-Western mountainous regions. In these regions, generally low agricultural productivity and poorly functioning markets limit the access to food for the most vulnerable population.

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

As of early May 2020, the number of confirmed positive cases of COVID-19 was minimal.

On 23 March 2020, as a measure to prevent the spread of the virus, the Government imposed a ban on domestic and international flights and closure of land border crossing as well as prohibited large gatherings of people and closed schools and universities. Transportation of goods and agricultural activities are authorized to continue in order to ensure adequate market availabilities.

On 30 March 2020, the Government set up several social support measures, including the provision of daily food rations for the most vulnerable households, subsidies for utility bills for low-usage customers and the extension of filing deadlines for taxes.

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## Nepal

### Cereal Production

	2014-2018 average	2018	2019 estimate	change 2019/2018
	000 tonnes			percent
Rice (paddy)	5 016	5 610	5 551	-1.1
Maize	2 382	2 640	2 650	0.4
Wheat	1 890	1 973	2 200	11.5
Others	342	342	352	2.9
<b>Total</b>	<b>9 629</b>	<b>10 565</b>	<b>10 753</b>	<b>1.8</b>

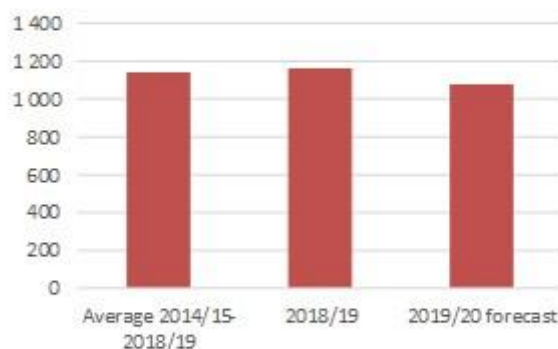
Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

## Nepal

### Cereals Imports

000 tonnes



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.



# GIEWS Country Brief Nepal

Reference Date: 04-June-2019

## FOOD SECURITY SNAPSHOT

- Prospects for 2019 wheat output favourable
- Near-average cereal import requirements forecast for 2019/20 marketing year (July/June)
- Overall, food security situation is good

## Prospects for 2019 wheat output favourable

Harvesting of the 2019 wheat crop is almost completed in the southern low-lying areas and is expected to finalize by the end of June in the northern hilly areas. Official forecasts indicate a record production of 2.2 million tonnes, mostly reflecting bumper yields supported by favourable weather conditions in the main producing areas. Between October and May, precipitations were above average in the southern plain (locally known as Terai Region), which accounts for more than 60 percent of the total annual wheat production. In the high altitude Hills and Mountains agro-ecological regions, snowfall was adequate during the winter months, protecting the wheat crops from freezing temperatures and after melting supported ample soil moisture content during the critical spring months. In addition, adequate supplies of high-yielding seed varieties, which covered nearly half of the planted area, and fertilizers increased productivity.

The 2019 maize crop, for harvest from August onwards, is growing under favourable weather conditions (see ASI map). The area planted is estimated at 942 079 hectares, slightly above last year's high level and continuing the steady increase for the seventh consecutive year, reflecting the high demand by the feed industry. Assuming average yields, the 2019 maize output is expected to surpass the 2018 record level.

Land preparation and planting of the 2019 paddy crop are progressing at a normal pace supported by above-average rains. The adequate supply of agricultural inputs and the effects of the official programmes promoting rice production are expected to keep the planted area close to the previous year's high level.

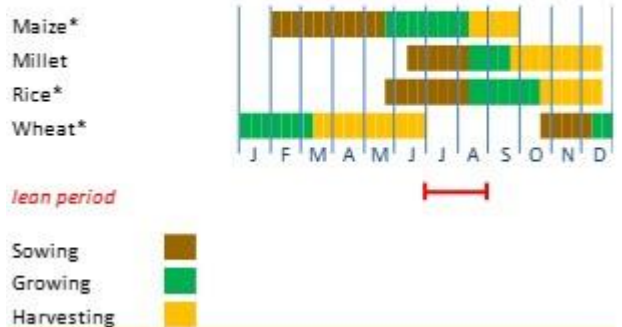
## Near-average cereal import requirements forecast for 2019/20 marketing year

Cereal import requirements in the 2019/20 marketing year (July/June) are forecast at a near-average level of 1.2 million tonnes. Rice imports in 2019 are forecast at 500 000 tonnes, 13 percent below the average level, reflecting expectations of a bumper output. Supported by sustained demand from the feed

## Nepal

Crop Calendar

(\*major foodcrop)



Source: FAO/GIEWS, FAO/WFP CFSAM 2007.

## Nepal

### Cereal Production

	2014-2018 average	2018	2019 forecast	change 2019/2018
	000 tonnes			percent
Rice (paddy)	4 976	5 340	5 400	1.1
Maize	2 382	2 640	2 650	0.4
Wheat	1 890	1 973	2 080	5.4
Others	342	342	354	3.5
<b>Total</b>	<b>9 589</b>	<b>10 295</b>	<b>10 484</b>	<b>1.8</b>

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

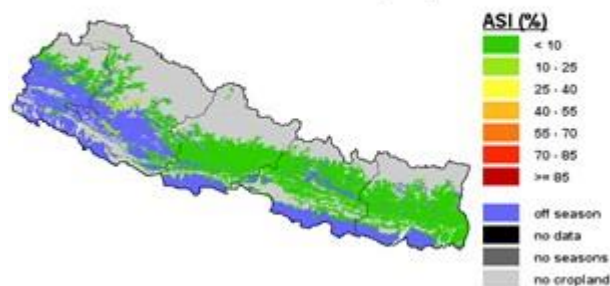
industry, import requirements for maize are expected to remain at an above-average level of 500 000 tonnes. Wheat imports, normally accounting for minor quantities, are forecast at a five-year low, in line with the forecast record output.

### Overall, food security situation is good

The overall food security situation is good, following three consecutive years of bumper harvests. However, concerns remain for an estimated 4.6 million food insecure people, accounting for 15 percent of the total population, mostly concentrated in the remote northern parts of Far-Western and Mid-Western mountainous regions. In these regions, generally low agricultural productivity and poorly functioning markets limit the access to food for most vulnerable population.

### Nepal - Agricultural Stress Index (ASI)

From start of season 1 to Dekad 3, May 2019

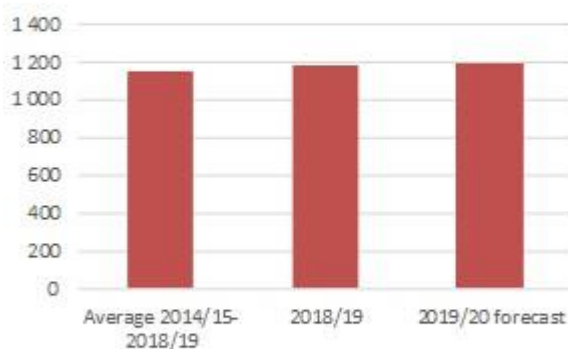


Source: FAO/GIEWS Earth Observation System.

### Nepal

#### Cereals Imports

000 tonnes



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.

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## GIEWS Country Brief Nepal

Reference Date: 07-March-2018

### FOOD SECURITY SNAPSHOT

- Current prospects for 2018 wheat output positive
- Above-average cereal harvest gathered in 2017
- Cereal import requirements in 2017/18 similar to previous year
- Pockets of severe food insecurity persist

### Current prospects for 2018 wheat output generally positive

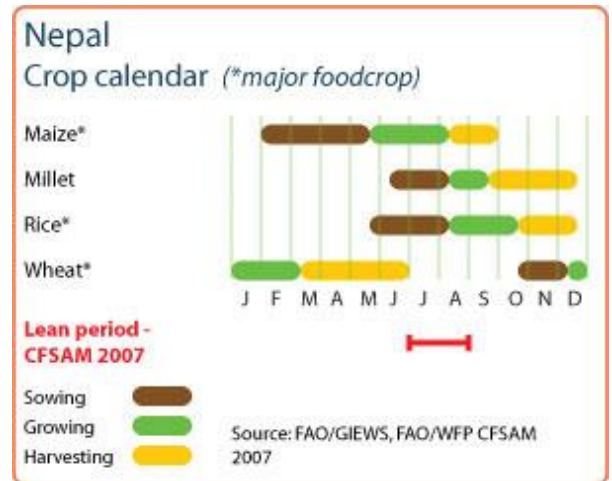
Harvesting of the 2018, mostly irrigated, winter wheat is expected to start by mid-March in southern low-lying areas and will continue until the end of June in the northern hilly areas. Overall, crops are in good condition throughout most of the country and production prospects are positive. Some concerns exist only for the wheat crops in central Terai plains, including the districts of Parsa, Bara and Rautahat, where water availability was limited by damages inflicted by last year's floods to the irrigation infrastructure.

### Above-average cereal harvest gathered in 2017

The 2017 national cereal output is estimated at about 9.5 million tonnes, slightly below 2016's record level but still above the five-year average. The overall decrease is the result of lower paddy production estimated at 4.8 million tonnes, 8 percent less than the 2016 record high, reflecting a combination of erratic monsoon rains between June and July and successive floods in August, which affected the crops in the southern Terai plains. By contrast, maize output for 2017 is officially estimated at 2.6 million tonnes, 9 percent above 2016's high level. The increase is the result of an expansion in plantings supported by strong demand from the feed industry and higher yields reflecting overall favourable weather conditions and adequate use of fertilizers. Similarly, the 2017 wheat output is estimated to have recovered from the 2016 reduced level and reached 1.8 million tonnes, close to the five-year average.

### Cereal import requirements in 2017/18 similar to previous year

In current 2017/18 marketing year (July/June), cereal import requirements, mainly rice, are forecast at about 930 000 tonnes, similar to the previous year's level and 12 percent above the five-year average. While imports of wheat and maize are anticipated to remain close to the 2016/17 level of 150 000 and 200 000



**Nepal**  
Cereal production

	2012-2016 average	2016	2017 forecast	change 2017/2016
	000 tonnes			percent
Rice (paddy)	4 774	5 230	4 800	-8
Maize	2 199	2 337	2 556	9
Wheat	1 841	1 737	1 834	6
Others	535	342	350	0
<b>Total</b>	<b>9 349</b>	<b>9 646</b>	<b>9 540</b>	<b>-3</b>

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



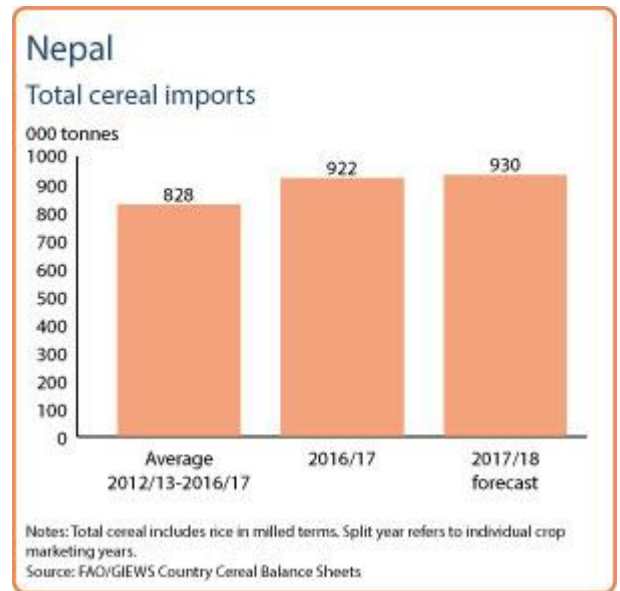
tonnes, respectively, rice imports are projected to increase by 5 percent in 2018 to 580 000 tonnes.

### Pockets of severe food insecurity persist

The overall food security situation is stable. However, there are some concerns for the most vulnerable households that live in remote northern parts of Far-Western and Mid-Western regions.

Severe floods in August 2017 affected 38 out of the country's 75 districts, mostly concentrated in the southern Terai plains. The floods displaced about 460 000 people and caused severe damage to housing and infrastructure, including irrigation canals, roads and bridges. Losses of food stocks and livestock were also reported. According to an official post-flood assessment, as of late September 2017, about 778 000 people were estimated to be food insecure (IPC Phase 4: "Emergency"), mostly in the districts of Bardiya, Dhanusa, Mahottari, Sarlahi and Rautahat.

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## GIEWS Country Brief Nepal

Reference Date: 07-June-2017

### FOOD SECURITY SNAPSHOT

- **Wheat production expected to rebound in 2017**
- **Cereal imports in 2017/18 (July/June) marketing year forecast to decrease from last year's average level**
- **Pockets of severe food insecurity persist**

### Wheat production to rebound in 2017

Harvesting of the 2017 winter wheat is nearing completion in southern low-lying areas and is expected to continue until the end of June in northern hilly areas. The 2017 wheat production is officially forecast to recover from last year's dry weather-affected output by 6 percent to 1.8 million tonnes. The increase mostly reflects expectations of a return to average yields, supported by favourable weather conditions and adequate input supplies, such as seeds, fertilizers and fuel.

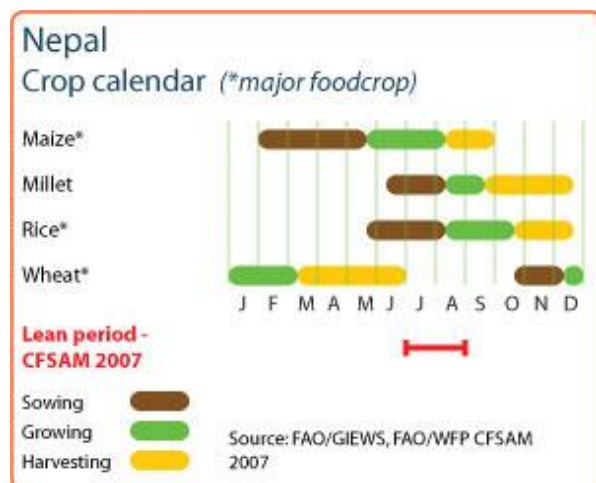
Planting of the 2017 maize is nearing completion, while that of rice just started and will continue until mid-August. Remote sensing data indicates favourable rainfall since early February, which benefited planting operations and early crop development for the maize crop. Assuming favourable weather for the remainder of the season, the 2017 maize output is forecast by FAO to increase slightly from last year's good level to 2.3 million tonnes. Mirroring expectations of an expansion in plantings, 2017 paddy production is projected to surpass last year's record by 2 percent to 5.4 million tonnes, although the outcome of the season will depend on the pattern of the monsoon rains.

### Cereal imports in 2017/18 marketing year (July/June) forecast at below average level

Consistent with expectations of a good 2017 cereal output, total cereal imports in the 2017/18 marketing year are forecast to decrease from last year's average level by 9 percent to 712 000 tonnes. Imports of wheat are forecast at 130 000 tonnes, a drop of 20 percent, while those of maize are anticipated to remain close to last year's level of 200 000 tonnes. Rice imports in the 2017 calendar year are projected at 440 000 tonnes, 17 percent below the 2016 high level.

### Pockets of severe food insecurity persist

Overall, the food security situation is gradually improving after the consequences of the April 2015 earthquake, which hit western, central and eastern regions of the country. Expectations of increased cereal production in 2017 and improved income from



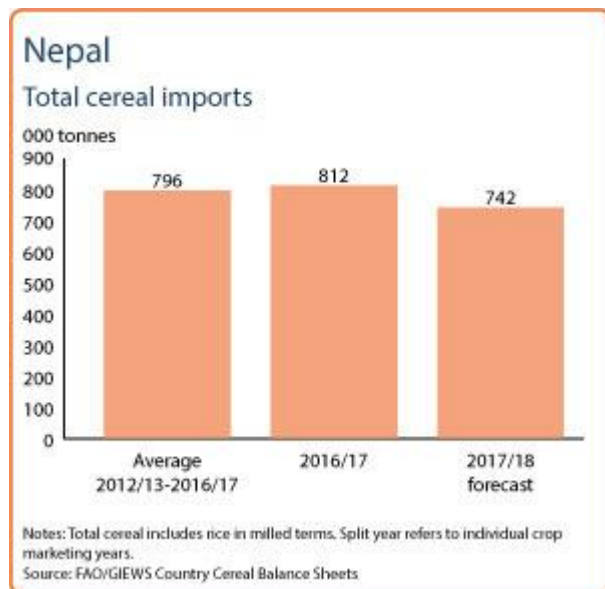
**Nepal**  
Cereal production

	2012-2016 average	2016	2017 forecast	change 2017/2016
	000 tonnes		percent	
Rice (paddy)	4,774	5,230	5,350	2
Maize	2,182	2,250	2,300	2
Wheat	1,841	1,737	1,834	6
Others	341	341	342	0
<b>Total</b>	<b>9,138</b>	<b>9,558</b>	<b>9,826</b>	<b>3</b>

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

agricultural activities are expected to further ameliorate the overall food security situation of the subsistence farmers in the most affected areas. However, authorities indicate that the food security situation remains of concern in remote northern parts of Far-Western and Mid-Western regions, as well as Gorkha and Dhading districts of western and in Central regions, respectively, due to a combination of localized cereal production shortfalls and reduced income from agricultural activities.

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# GIEWS Country Brief Nepal

Reference Date: 14-October-2016

## FOOD SECURITY SNAPSHOT

- Paddy production forecast to recover in 2016
- Cereal imports in 2016/17 (July/June) marketing year forecast at record level
- Pockets of severe food insecurity persist

## Paddy production forecast to recover in 2016

Harvesting of the 2016 summer (monsoon) paddy crop is about to start and will continue until mid-December. FAO forecasts the 2016 paddy output to recover to 4.8 million tonnes, up 13 percent from the reduced 2015 level. The favourable outlook reflects an estimated normal level of plantings and an expected return to normal yields following generally favourable weather and reportedly adequate input supplies. Heavy rains in July triggered some localized flooding and landslides in parts of Central and Western regions, but the impact on summer crops was limited.

The 2016 maize crop, recently harvested, is estimated by FAO at 2.2 million tonnes, close to last year's near-average level.

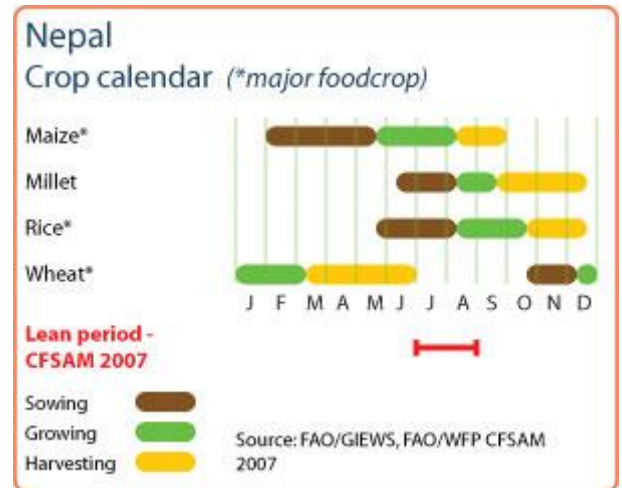
The 2016 wheat crop, gathered by June, is estimated at 1.4 million tonnes, 11 percent below the 2015 already reduced level. This was the result of both area and yield reductions due to poor rains during the growing season, coupled with reduced seed, fertilizer and fuel availability following the disruption of cross-border trade with India from September 2015 to February 2016.

## Cereal imports in 2016/17 marketing year (July/June) forecast at record level

Cereal imports in the 2016/17 marketing year (July/June) are forecast to reach a record level of 962 000 tonnes. Reflecting the lower wheat output in 2016, imports of wheat are expected to more than double to 250 000 tonnes. Similarly, rice imports are forecast to increase slightly to 550 000 tonnes in calendar year 2016 reflecting the reduced production in 2015. Maize imports are anticipated to remain close to last year's level of 200 000 tonnes.

## Pockets of severe food insecurity persist

According to official reports, as of July 2016, large numbers of people, mostly concentrated in the districts of Gorkha (Western Region) and Dhading, Nuwakot and Sindhupalchowk (northern parts of Central Region) remain highly food insecure following the

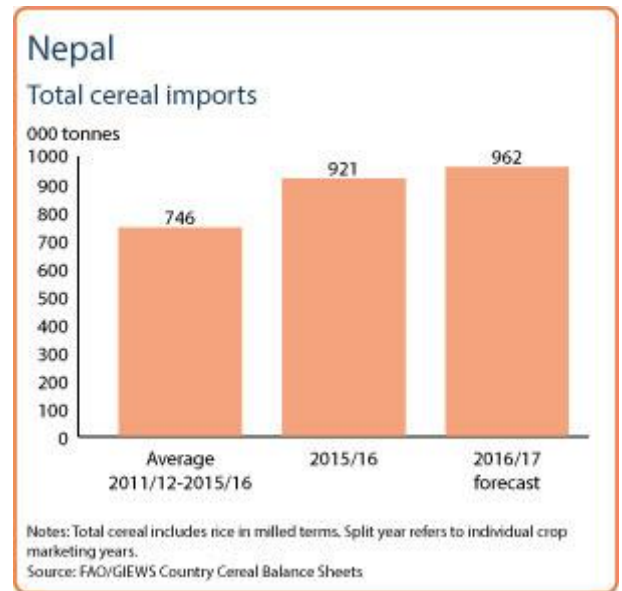


**Nepal**  
Cereal production

	2011-2015	2015	2016	change
	average		forecast	2016/2015
	000 tonnes			percent
Rice (paddy)	4 742	4 299	4 840	13
Maize	2 167	2 230	2 250	1
Wheat	1 805	1 571	1 400	-11
Others	342	336	345	3
<b>Total</b>	<b>9 056</b>	<b>8 436</b>	<b>8 835</b>	<b>5</b>

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

widespread devastation caused by the major earthquake in April 2015 that resulted in at least 9 000 deaths. Authorities indicate a significant deterioration of the food security situation in remote areas, particularly in northern parts of Far-Western and Mid-Western regions due to a combination of cereal production shortfalls and reduced income from agricultural activities. Furthermore, floods and landslides in July negatively affected a large number of people particularly in the northern parts of Western and Central regions as well as southern areas of Eastern Region.







# GIEWS Country Brief Nepal

Reference Date: 29-July-2016

## FOOD SECURITY SNAPSHOT

- Paddy production forecast to recover in 2016
- Cereal imports in 2016/17 (July/June) marketing year to reach record level
- Pockets of severe food insecurity persist

## Paddy production forecast to recover in 2016

Planting of the 2016 summer (monsoon) crops, mostly paddy, is ongoing. Rains have been above average over most of the country since mid-May, benefitting transplanting activities. Excessive precipitation triggered localized flooding and landslides in parts of Central and Western Regions, but the impact on early-planted crop is expected to be minimal. Assuming normal weather prevails and given reported adequate fertilizer supplies, FAO forecasts the 2016 paddy output to recover to 4.8 million tonnes, up 13 percent from the reduced 2015 level.

The 2016 maize crop is currently in the late development stages. FAO forecasts the 2016 maize output to remain close to last year's near-average level.

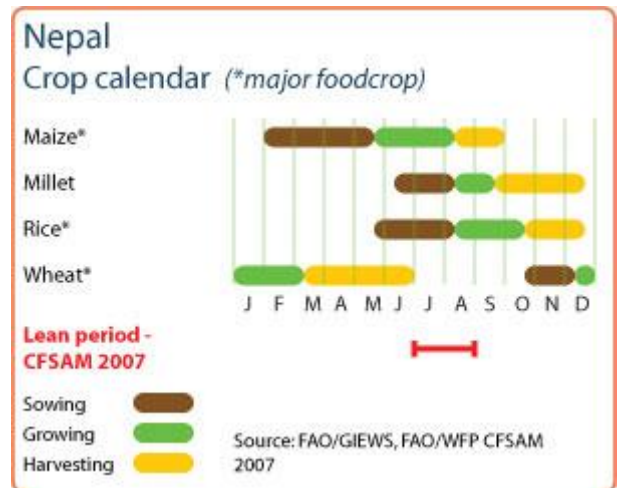
The 2016 wheat crop, harvested by June, is estimated at 1.4 million tonnes, 11 percent below the 2015 already-reduced level. This is the result of both area and yields reductions, due to poor rains during the growing season, coupled with reduced seed, fertilizer and fuel availability, following the disruptions of cross-border trade with India from September 2015 to February 2016.

## Cereal imports in 2016/17 marketing year (July/June) to reach record level

Cereal imports in the 2016/17 marketing year (July/June) are forecast to reach a record level of 962 000 tonnes. Reflecting lower wheat output in 2016, imports are expected to almost double to 250 000 tonnes. Similarly, rice imports are anticipated to increase slightly to 550 000 tonnes in calendar year 2016, reflecting the reduced 2015 production. Maize imports are expected to remain close to last year's level of 200 000 tonnes.

## Pockets of severe food insecurity persist

According to official reports, as of April 2016, large number of people, mostly concentrated in the districts of Gorkha (Western Region) and Dhading, Rasuwa, Dolakha and Ramechhap (northern parts of Central Region) remain highly food insecure,

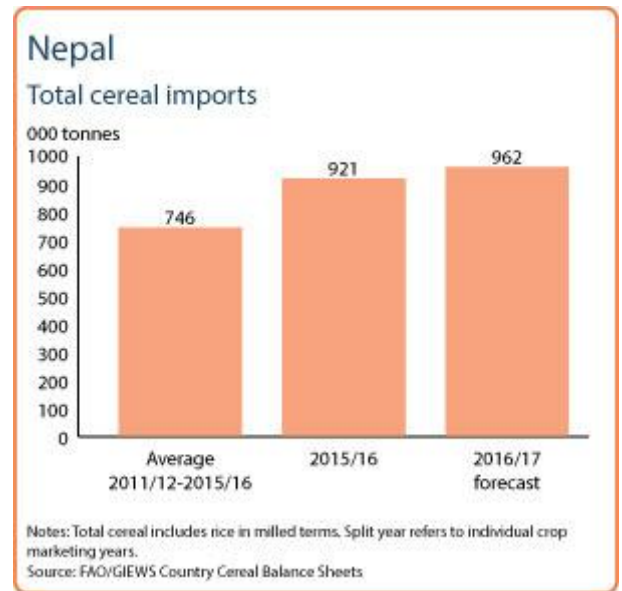


**Nepal**  
Cereal production

	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Rice (paddy)	4,742	4,299	4,840	13
Maize	2,167	2,230	2,250	1
Wheat	1,805	1,571	1,400	-11
Others	342	336	345	3
<b>Total</b>	<b>9,056</b>	<b>8,436</b>	<b>8,835</b>	<b>5</b>

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

following the widespread devastation caused by the major earthquake in April 2015 that resulted in at least 9 000 deaths. Authorities indicate a significant deterioration of food security situation in remote areas, including Karnali (Mid-Western Region) and district of Bajura (Far-Western Region) due to combination of cereal production shortfalls for the second consecutive year and reduced income from agricultural activities. Furthermore, recent floods and landslides negatively affected large number of people particularly in the northern parts of Western and Central Regions as well as southern areas of Eastern Region.



Reference Date: 19-November-2015

### FOOD SECURITY SNAPSHOT

- Rice production in 2015 forecast to decrease for second consecutive year
- Cereal imports in 2015/16 (July/June) marketing year anticipated at record level

### Rice production in 2015 forecast to decrease for second consecutive year

Harvesting of the 2015 rice crop started in mid-October and will continue until December. FAO forecasts the 2015 rice production at 4.6 million tonnes, 4 percent below last year's reduced level, as a result of a light contraction in area planted and also yields, following below-average rains over the central and eastern Terai areas, which account for the bulk of rice production at national level.

FAO's estimate for the main 2015 maize crop, harvested by September, indicates a 7 percent year-on-year decline with an output level of 2 million tonnes. The drop is mainly due to reduced seed and fertilizer availability, following the losses caused by the earthquake in April.

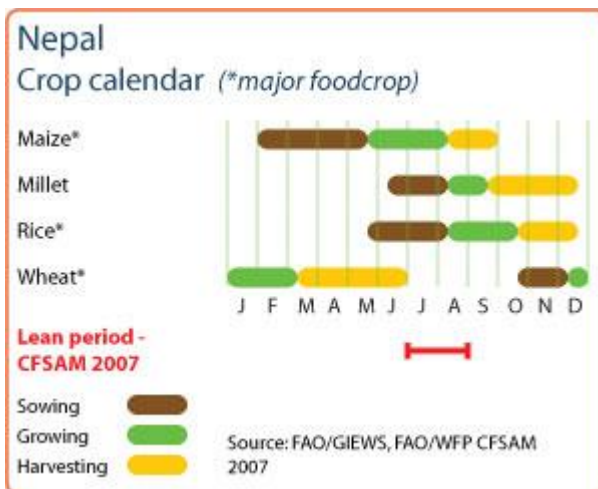
The 2015 winter wheat crop, harvested in June, is estimated by FAO at 1.9 million tonnes, 4 percent below 2014 record level. The year-on-year decrease is mainly attributed to slightly lower yields, following heavy rains in March, which affected the standing crops in the final stages of development.

### Cereal imports in 2015/16 marketing year (July/June) anticipated at record level

Cereal imports in the 2015/16 marketing year (July/June) are anticipated to reach a record level of 855 800 tonnes, 35 percent above last year's high level. Most of this volume is rice, imports of which are anticipated at 640 000 tonnes in 2016, up 14 percent from the previous year's level, reflecting the reduced 2015 production and sustained demand. Similarly, a lower 2015 maize output is expected to boost imports to 190 000 tonnes from last year's low level of 50 000 tonnes.

### FAO to provide assistance for agriculture rehabilitation

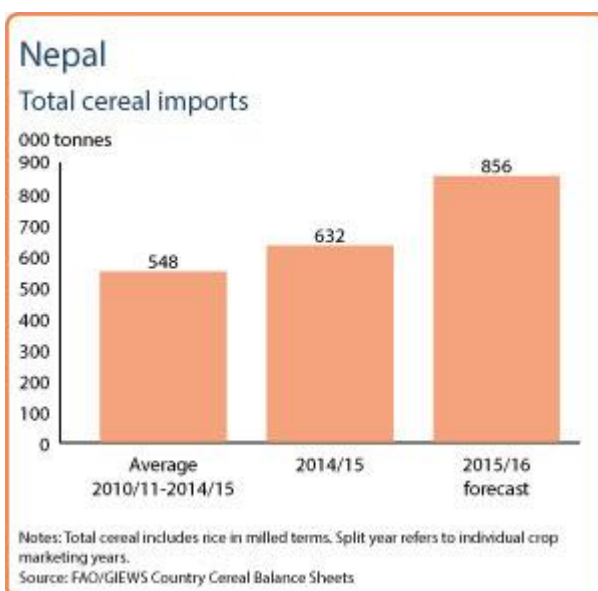
A major earthquake of magnitude 7.8 (Mw) on the Richter Scale struck Central and Western regions of Nepal on 25 April causing widespread destruction. According to the latest official information, at least 9 000 people were confirmed dead and more than 23 000 injured. In order to assess the impact of the earthquake on agriculture, an Agricultural Livelihood Impact Appraisal (ALIA), a Nepal Food Security Cluster exercise led by FAO, was undertaken in the most severely-affected districts, namely Dhading, Dolokha, Gorkha, Nuwakot, Rasuwa and Sindhupalchok. According to the ALIA, the agricultural livelihoods in the most affected districts suffered particularly of high levels of damage, including losses to stored food, agricultural inputs, as well as damages to small-scale irrigation and drainage canals. Most of the population affected by the earthquake is critically dependent on agriculture for their livelihoods and many are vulnerable to food insecurity. As part of the



### Nepal Cereal production

	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes			percent
Rice (paddy)	4 774	4 789	4 600	-4
Maize	2 135	2 145	2 000	-7
Wheat	1 802	1 976	1 890	-4
Others	369	488	494	1
<b>Total</b>	<b>9 081</b>	<b>9 398</b>	<b>8 984</b>	<b>-4</b>

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



recovery and response effort following the earthquake, FAO has reached over 182 000 vulnerable households in the six districts most severely affected by the earthquake with agricultural inputs, including rice seeds, grain and seed storage, packets of mixed vegetable seeds and animal feed supplements. FAO also aims to provide durable grain and seed storage bags to prevent post-harvest losses and support 2016 winter crop production, through the provision of seeds and reparation of small-scale irrigation infrastructure.

Reference Date: 28-April-2015

### FOOD SECURITY SNAPSHOT

- Earthquake caused widespread devastation in the Central and Western Regions
- The 2015 wheat production forecast to decrease from last year's level
- Cereal imports in 2014/15 (July/June) marketing year anticipated at record level

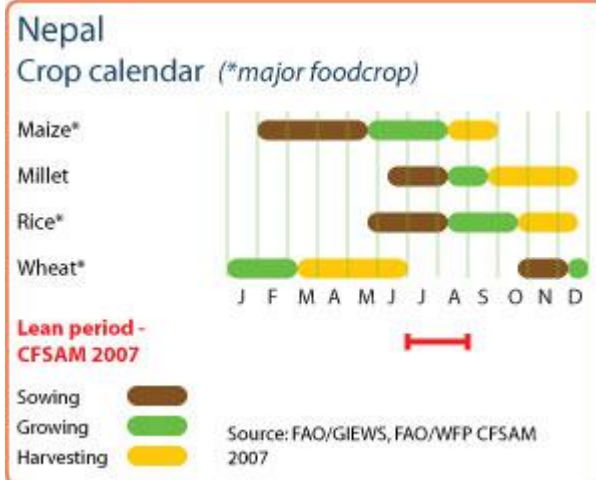
## Earthquake caused widespread devastation severely affecting the food security in the Central and Western Regions

An earthquake of magnitude 7.8 (Mw) on the Richter Scale, the worst the country has experienced in 80 years, struck on 25 April Central and Western Regions of Nepal, with the epicentre in Lampung District (north-west) of Kathmandu. Dozens of aftershocks followed, with magnitudes ranging between 4.5 and 6.7 (Mw). According to the latest official information, as of 28 April, at least 5 057 people have been confirmed dead, more than 10 915 injured and hundreds are still missing. The numbers are expected to increase as more information becomes available with rescue teams reaching villages in remote areas. Latest estimates indicate that some 39 out of the country's 75 districts have been affected, of which 11 are reported to have incurred severe damages. This includes the largest cities of Kathmandu and Pokhara, the very densely populated districts of Sindupalchowk, Kavre, Nuwakot, Rasuwa, Dolakha and Lamjung, as well as villages in mountain and hilly areas. The earthquake caused severe damage to housing, infrastructure, including hospitals, schools roads and bridges. Large numbers of vulnerable population in the mountain and hilly areas have remained isolated. Internal trade, including the movement of emergency assistance is severely constrained. The food security situation of the affected population is adversely impacted by the difficulties to access to food. The damage to the agriculture sector has not yet been assessed but wheat and maize crops in the Central Mountain, Central Hills, Western Mountain and Western Hills Regions are likely to be affected the most due to landslides and disruption of harvesting operations for wheat and planting for maize. In addition, losses to the stored food, agricultural inputs, as well as damages to irrigation and drainage canals are likely to be high.

Food and non-food assistance, including emergency shelters, is immediately required. The Government of Nepal has declared the state of emergency in the affected areas and officially requested international assistance.

## The 2015 wheat production projected to decrease from last year's level

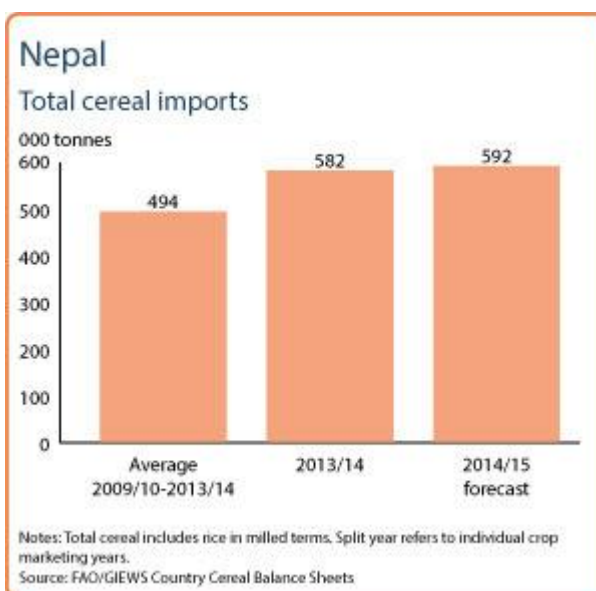
Harvesting of the 2015 mostly irrigated winter wheat is nearing completion in the low-lying areas in southern parts and is expected to continue until the end of June in the northern hilly areas. Heavy rains, coupled with strong winds and localized hail, during the first dekad of March over the western growing areas, negatively affected the standing wheat crop in the final stages of development. Pending a more detailed



### Nepal Cereal production

	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes			percent
Rice (paddy)	4,774	4,789	5,000	4
Maize	2,166	2,300	2,300	0
Wheat	1,787	1,900	1,800	-5
Others	369	488	494	1
<b>Total</b>	<b>9,096</b>	<b>9,477</b>	<b>9,594</b>	<b>1</b>

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





assessment of crops losses due to the earthquake and considering the previous crop damages as a result of unseasonal rains, FAO puts the 2015 wheat production at 1.8 million tonnes, some 5 percent below last year's record level.

Sowing of the 2015 maize and rice crops is undergoing or about to be planted in low-laying *Terai* areas. As these areas have been marginally affected by the earthquake, and pending more detail information on damages, FAO's still keeps its preliminary production forecast of 2.3 million tonnes for maize, around last year's level, and 5 million tonnes of rice, a recovery from the 2014 reduced crop. However, in the most affected areas planting reductions may be severe. Therefore it is critical that farmers receive agricultural assistance, including seeds, planting material and farming equipment, to sow rice in time and avoid output shortfalls in these areas.

### **Cereal imports in the 2014/15 marketing year (July/June) anticipated at record level**

Cereal imports for the 2014/15 marketing year (July/June) are expected to reach 591 800 tonnes, slightly above last year's record level. Most of this volume is rice, imports of which are anticipated at 520 000 tonnes, up 2 percent from the previous year's level, reflecting a slightly reduced 2014 production and sustained demand. By contrast, maize imports are forecast to remain similar to the low level of 2013/14, reflecting a good harvest for two consecutive years.

Reference Date: 22-December-2014

### FOOD SECURITY SNAPSHOT

- 2014 rice production estimated to decrease
- Cereal imports in 2014/15 marketing year forecast to increase to record level
- Rice and wheat prices at high levels
- Overall food supply has improved with record 2013 cereal production

### The 2014 rice production estimated to decrease

Harvesting of the 2014 main season rice crop was completed by mid-December. FAO estimates this year's rice production at 4.6 million tonnes, down 9 percent from last year's bumper level but close to the average of the past five years. The decrease is attributed to an estimated 6 percent contraction in area planted as a result of late and below-average monsoon rains which hindered sowing operations and reduced yields. Additional damages to the crop were caused by floods and landslides across Mid-Western and Far-Western regions of the country following heavy rains in August.

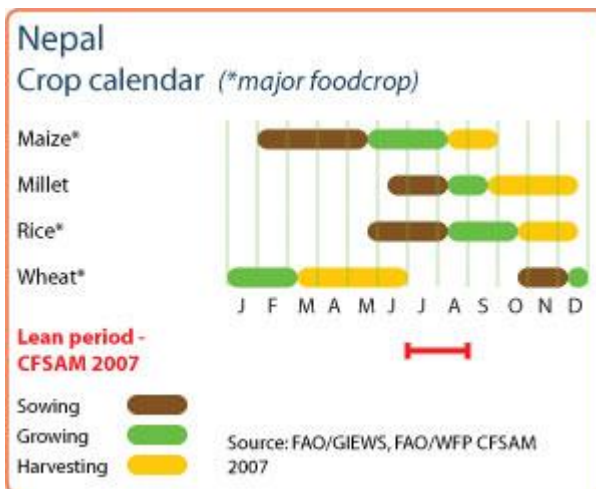
Harvesting of the 2014 maize crop was completed in September. FAO's estimate puts this year's maize output at 2.3 million tonnes, around last year's good level. Similarly, the 2014 wheat output, harvested in June, is estimated to remain close to last year's record level and reach 1.9 million tonnes.

### Cereal imports in the 2014/15 marketing year (July/June) forecast to increase to record level

Cereal import requirements for the 2014/15 marketing year (July/June) are forecast at 571 800 tonnes, about 10 percent above last year's high level. Most of this volume is rice, imports of which are anticipated at 500 000 tonnes, up 11 percent from the previous year's record level, reflecting reduced 2014 production and sustained demand. Maize imports in the 2014/15 marketing year (July/June) are forecast to remain similar to the low level of 2013/14, reflecting a good harvest for a second consecutive year.

### Overall food supply has improved across the country

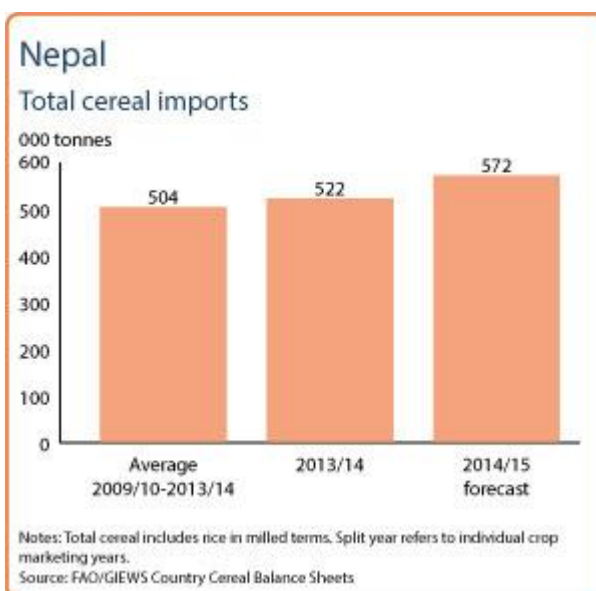
Overall, the food security situation in the country is satisfactory following average to above-average harvest, improved employment opportunities provided by development programmes and the relatively regular supply of food to the local markets, including those in the hill and mountain areas. However, the floods in August 2014 affected at least 230 000 people, damaged houses and infrastructure. Crop and livestock losses of the affected households were also reported.



### Nepal Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes		percent	
Rice (paddy)	4 621	5 047	4 600	-9
Maize	2 077	2 283	2 300	1
Wheat	1 676	1 882	1 900	1
Others	336	341	488	43
<b>Total</b>	<b>8 710</b>	<b>9 553</b>	<b>9 288</b>	<b>-3</b>

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



Reference Date: 22-October-2014

### FOOD SECURITY SNAPSHOT

- 2014 rice production forecast to decrease
- Cereal imports in 2014/15 marketing year forecast to increase to record level
- Rice and wheat prices at high levels
- Overall food supply has improved with record 2013 cereal production

### The 2014 rice production forecast to decrease

Harvesting of the 2014 main season rice crop has just begun and will continue in mid-December. FAO forecasts this year's rice production at 4.6 million tonnes, down 9 percent from last year's bumper level but close to the average of the past five years. The decrease is attributed to an estimated 6 percent contraction in area planted as a result of late and below-average monsoon rains which hindered sowing operations and reduced yields. Additional damages to the crop were caused by floods and landslides across Mid-Western and Far-Western regions of the country following heavy rains in August.

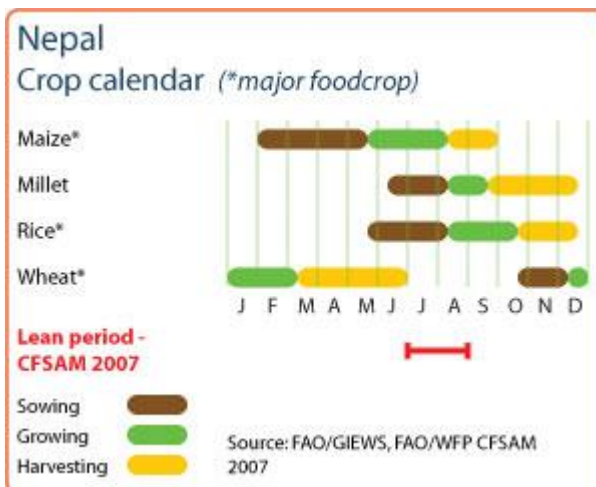
Harvesting of the 2014 maize crop was completed in September. FAO's estimate puts this year's maize output at 2.3 million tonnes, around last year's good level. Similarly, the 2014 wheat output, harvested in June, is estimated to remain close to last year's record level and reach 1.9 million tonnes.

### Cereal imports in the 2014/15 marketing year (July/June) forecast to increase to record level

Cereal import requirements for the 2014/15 marketing year (July/June) are forecast at 571 800 tonnes, about 10 percent above last year's high level. Most of this volume is rice, imports of which are anticipated at 500 000 tonnes, up 10 percent from the previous year's record level, reflecting reduced 2014 production and sustained demand. Maize imports in the 2014/15 marketing year (July/June) are forecast to remain similar to the low level of 2013/14, reflecting a good harvest for a second consecutive year.

### Overall food supply has improved across the country

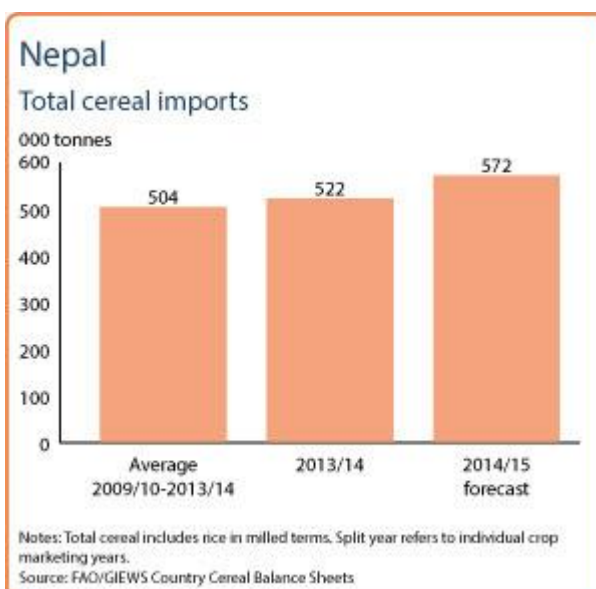
Overall, the food security situation in the country is satisfactory following average to above-average harvest, improved employment opportunities provided by development programmes and the relatively regular supply of food to the local markets, including those in the hill and mountain areas. However, recent floods affected at least 230 000 people, damaged houses and infrastructure. Crop and livestock losses of the affected households were also reported.



### Nepal Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes			percent
Rice (paddy)	4 621	5 047	4 600	-9
Maize	2 077	2 283	2 300	1
Wheat	1 676	1 882	1 900	1
Others	336	341	488	43
<b>Total</b>	<b>8 710</b>	<b>9 553</b>	<b>9 288</b>	<b>-3</b>

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



Reference Date: 30-May-2014

### FOOD SECURITY SNAPSHOT

- Favourable prospects for the 2014 wheat crop
- Cereal imports in the 2013/14 marketing year forecast close to last year's volumes
- Rice and wheat prices at high levels
- Overall food supply has improved with record 2013 cereal production

### The 2014 wheat production forecast to increase

Harvesting of the 2014, mostly irrigated, winter wheat is completed in the low-lying areas in the south and is expected to continue until the end of June in the northern hilly areas. FAO forecasts this year's wheat production at a record level of 1.9 million tonnes, slightly above last year's bumper output. The projected increase is mainly attributed to favourable weather conditions during the growing season and good supplies of irrigation water and fertilizers.

Sowing of the 2014 maize crop has recently been completed. FAO's preliminary forecast puts this year's maize output at 2.3 million tonnes, around last year's good level.

Planting of the 2014 rice crop has just started and will continue until August. Early indications point to a decrease in this year's rice output to 4.8 million tonnes, as yields are projected to return to average, after record levels in 2013.

### Record 2013 aggregate cereal harvest

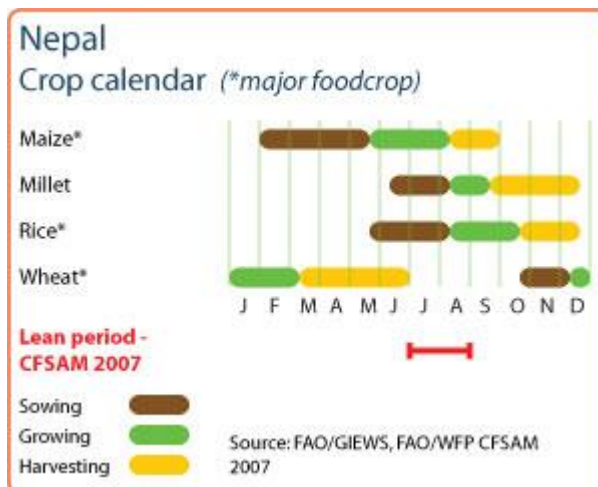
Recent official estimates of the 2013 aggregate cereal production have been revised upwards to a record level of 9.6 million tonnes, 10 percent up on the dry weather-reduced output of 2012. Prolonged and abundant monsoon rains, coupled with good input supplies, supported the recovery of production.

### Cereal imports in the 2013/14 marketing year (July/June) expected to remain high

The cereal import requirements in the current 2013/14 marketing year (July/June) are forecast at 521 800 tonnes, close to last year's above-average level. Most of this volume is rice, imports of which are anticipated at 450 000 tonnes, slightly up from the previous year's level, reflecting sustained demand. By contrast, maize imports in the 2013/14 marketing year (July/June) are forecast to decline to about half the level of 2012/13, or 50 000 tonnes, reflecting record 2013 maize production.

### Rice and wheat prices at high levels

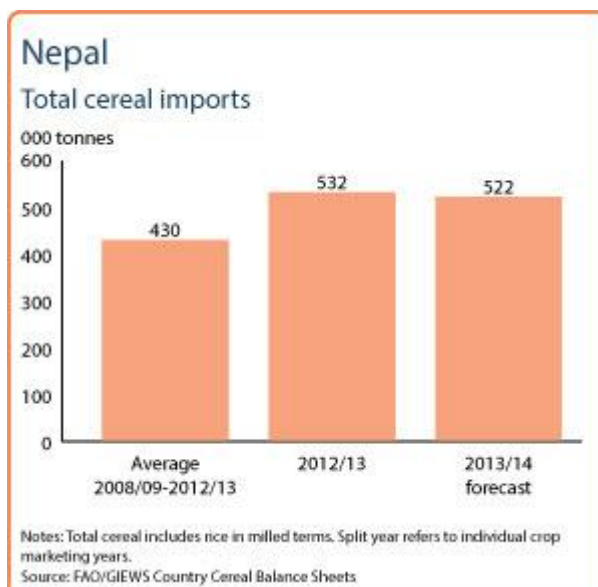
Retail prices of staple rice decreased slightly in March partly reflecting low export prices in India, the country's main supplier. Similarly, retail prices of wheat declined in March from their peaks of the previous month, with the start of the 2014 wheat harvest, anticipated at a record level. However, rice and wheat prices in March 2014, remained 14 and 19 percent, above their levels a year earlier, respectively.



### Nepal Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes		percent	
Rice (paddy)	4,621	5,047	4,800	-5
Maize	2,077	2,283	2,250	-1
Wheat	1,676	1,882	1,900	1
Others	336	341	488	43
<b>Total</b>	<b>8,710</b>	<b>9,553</b>	<b>9,438</b>	<b>-1</b>

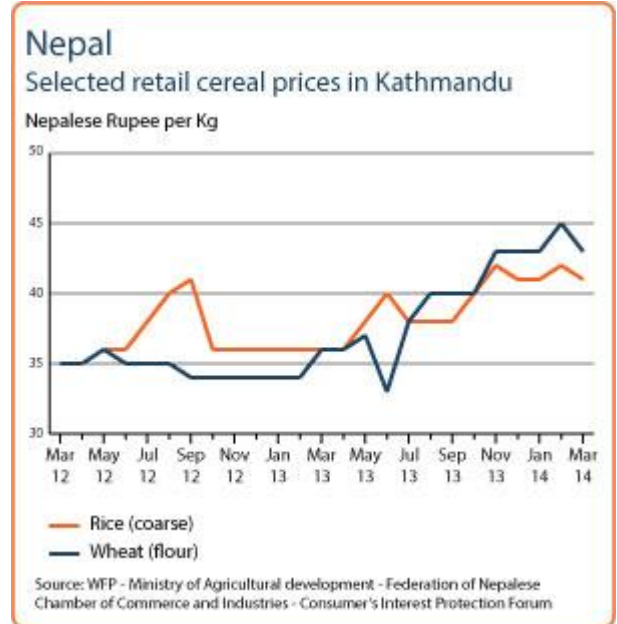
Note: percentage change calculated from unrounded data.  
Source: FAO/GIEWS Country Cereal Balance Sheets





## Overall food supply has improved across the country

Overall, the food security situation in the country is satisfactory following the record harvest, improved employment opportunities provided by development programmes and relatively regular supply of food to the local markets, including those in the hill and mountain areas. However, near-record prices result in reduced purchasing power and are a concern, especially for the low-income sections of the population.





Reference Date: 16-December-2013

### FOOD SECURITY SNAPSHOT

- Above-average aggregate cereal crop estimated for 2013
- Rice and wheat prices at high levels
- Overall food supply has improved across the country

## Above-average aggregate cereal crop estimated for 2013

Harvesting of the 2013 main summer season crops, mainly paddy rice and millet, is completed. Given prolonged and favourable rains, coupled with good input supplies during the growing season, the 2013 aggregate paddy output is estimated by FAO at 4.6 million tonnes, 2 percent up on the 2012 output affected by adverse weather. Similarly, the 2013 maize production is officially estimated to increase by 3 percent over the 2012 level and reach 2.1 million tonnes, while wheat production is put at a record level of 1.88 million tonnes, some 2 percent above the 2012 good output. Overall, the 2013 cereal production is estimated at 8.9 million tonnes, some 2 percent above the 2012 level. However, pocket areas reportedly suffered some wheat crop damage, due to hailstorms, insufficient rainfall and lack of fertilizers.

Sowing of the 2013/14 winter wheat crop has recently been completed under generally favourable weather conditions.

The cereal import requirements in the current 2013/14 marketing year (July/June) are forecast at 621 800 tonnes, up on previous year's 531 800 tonnes. Rice and maize constitute the bulk of the imports.

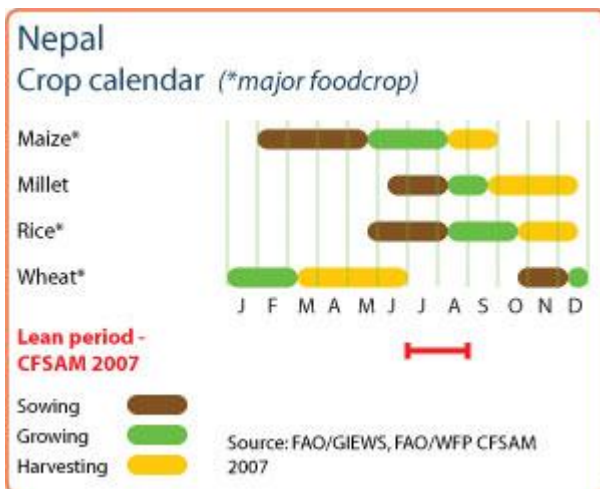
## Rice and wheat prices at high levels

In the major consumer market, Kathmandu, prices of rice strengthened in October, due to an increase in demand attributed to the Dashain and Tihar festivals. Prices of wheat flour stabilized in recent months, after they had seasonally increased during the lean period (July to August). The annual consumer price index (CPI) in November 2013 was up 9.9 percent relative to the same period a year before. The food and beverages component of the CPI rose by 9.6 percent.

## Overall food supply has improved across the country

Overall, the food security situation in the country is satisfactory following the above-average harvest, improved employment opportunities provided by development programmes and relatively regular supply of food to the local markets. However, near-record prices and high general inflation result in reduced purchasing power and are a concern especially for the low income sections of the population.

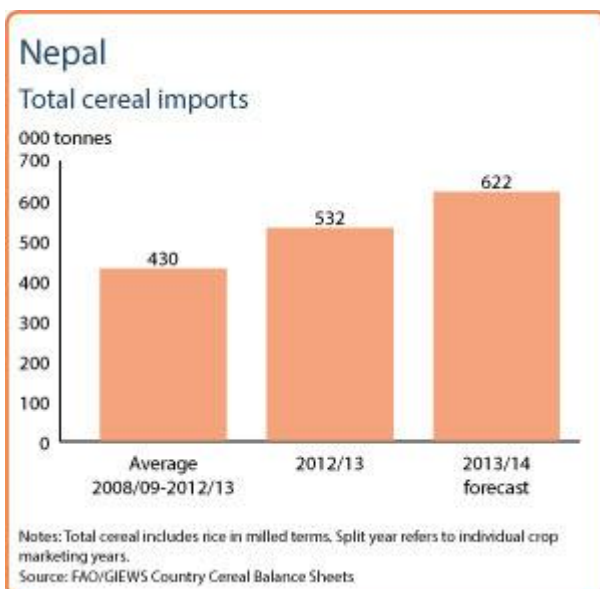
Pockets of food insecurity exist in some districts, including Dailekh (located in Mid-Western Development Region), following reduced winter wheat crop harvest as a result of hailstorms, as well as Darchula (located in Far-Western Development Region), due to the negative effects of floods this year.



### Nepal Cereal production

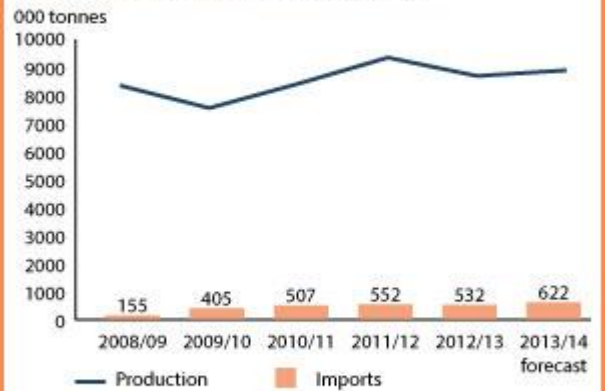
	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes		percent	
Rice (paddy)	4 517	4 504	4 600	2
Maize	2 006	1 999	2 068	3
Wheat	1 614	1 846	1 882	2
Others	332	341	343	1
<b>Total</b>	<b>8 469</b>	<b>8 690</b>	<b>8 893</b>	<b>2</b>

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



## Nepal

### Total cereal production and imports

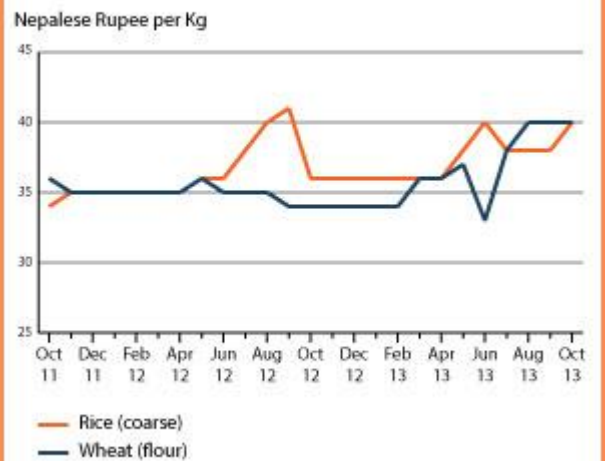


Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.

Source: FAO/GIEWS Country Cereal Balance Sheets

## Nepal

### Selected retail cereal prices in Kathmandu



Source: Ministry of Agriculture and Cooperatives, Nepal

Reference Date: 22-January-2013

### FOOD SECURITY SNAPSHOT

- Early prospects for the 2013 wheat crop are favourable
- Above average aggregate cereal crop gathered in 2012
- Rice and wheat prices stabilized
- The overall food security situation is favourable but it remains a concern primarily in Hill and Mountains districts

### Early prospects for the 2013 wheat crop are favourable

Planting of the 2012/13 winter season crops, mainly wheat and barley, was completed in December. Favourable rains since mid-September, supplemented soil moisture benefiting planting while above-normal temperatures over much of the country, except internal areas of Mid-Western Region, aided early development of crops.

### Above average aggregate cereal crop gathered in 2012

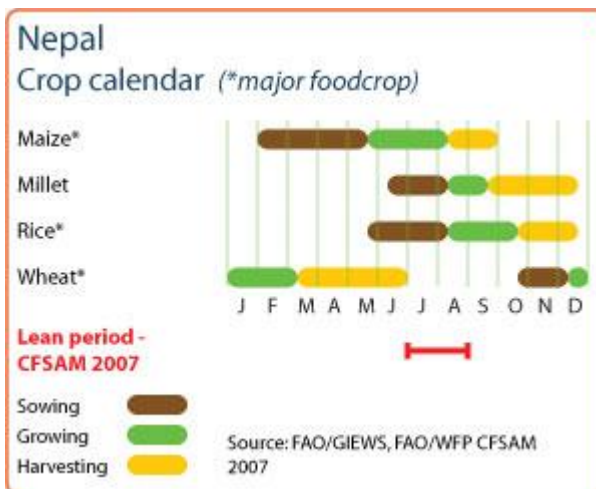
Harvesting of the 2012 maize crop was completed in September and the output is officially estimated at 2 million tonnes, some 8 percent less than the record harvest in 2011 but slightly above the previous five years average. The decline is mainly the result of dry weather conditions from April to June, which negatively impacted crop development during the emergence and vegetative growing stage. Similarly, the 2012 paddy crop, harvested by mid-December, is officially estimated at above average level of 4.5 million tonnes, some 11 percent below the 2011 record crop. A period of dry weather at the start of the season, localized floods in July and September and reported reduced availability of fertilizer, especially in the western parts of the country are the main reasons behind the contraction of 2012 paddy production. By contrast, latest official estimate puts the 2012 wheat production at a record level of 1.85 million tonnes, some 6 percent up on 2011 previous record output, mainly on account of prolonged and favourable monsoon rains. Overall, the 2012 cereal production is estimated at 8.7 million tonnes, about 7 percent less than the record harvest in 2011, but still some 4 percent higher than the previous five-year average.

The cereal import requirements in the current 2012/13 marketing year (July/June) are forecast at 386 800 tonnes, up on previous marketing year's 251 800 tonnes. Rice and maize constitute the bulk of the imports, forecast at 200 000 and 150 000 tonnes, respectively.

### Rice and wheat prices stabilised in recent months

In the major consumer market of Kathmandu, prices of wheat flour and rice have remained stable in recent months, following Government's price stabilizing interventions by fixing the maximum retail price of 15 essential commodities, including four types of rice and wheat flour. Retail prices of rice, sugar, edible oil and pulses had increased considerably between July and August, mainly due to higher transport costs following increased fuel prices.

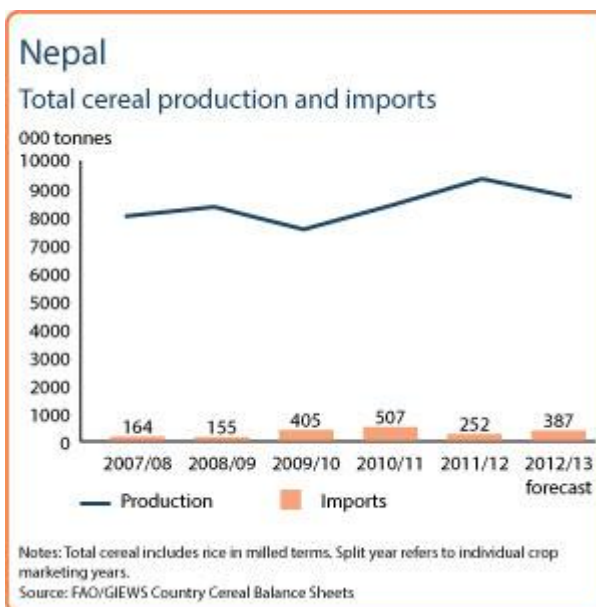
According to latest data from Nepal Rastra Bank the annual consumer price index (CPI) in November 2012 was up 8.3 percent relative to the



### Nepal Cereal production

	2007-2011 average	2011	2012 estimate	change 2012/2011
	000 tonnes		percent	
Rice (paddy)	4,476	5,072	4,504	-11
Maize	1,982	2,179	1,999	-8
Wheat	1,548	1,750	1,850	6
Others	328	345	341	-1
<b>Total</b>	<b>8,334</b>	<b>9,346</b>	<b>8,694</b>	<b>-7</b>

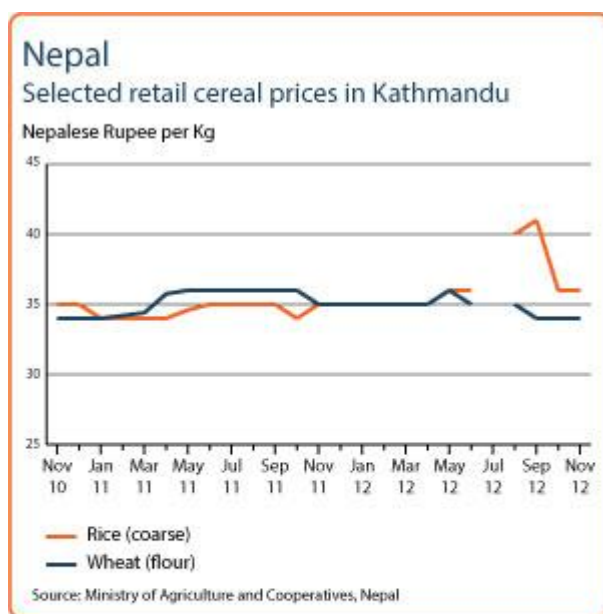
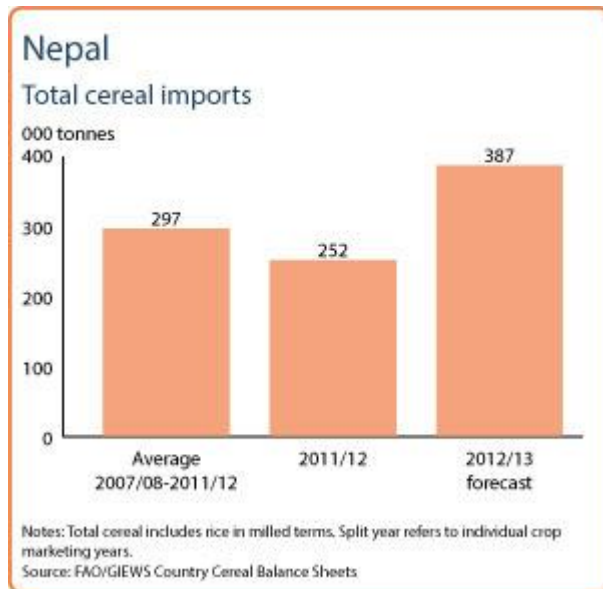
Note: percentage change calculated from unrounded data.  
Source: FAO/GIEWS Country Cereal Balance Sheets



same period year before. The food and beverages component of the CPI rose by 7.7 percent while that of non-food and services increased by 9 percent.

### The overall food security situation is favourable but concerns remain primarily for the Hill and Mountains districts

Overall, the food security situation in the country is satisfactory following good stock levels from the record crop in 2011, the above average 2012 cereal harvest, improved employment opportunities provided by development programmes and relatively regular supply of food to the local markets. However, the overall decrease in total domestic food availability compared to the previous year may affect the food security situation in parts of the Hill and Mountain districts.





Reference Date: 26-June-2012

### FOOD SECURITY SNAPSHOT

- Record 2012 wheat harvest officially estimated
- 2011 cereal harvest estimated at record level of 9.3 million tonnes
- Rice and wheat prices increase slightly in May
- The overall food security situation is favourable but it remains a concern in certain areas

### Record 2012 wheat harvest officially estimated

Harvesting activities of the 2012 winter season crops, mainly wheat and barley are almost complete.

The official estimate puts the 2012 wheat production at a record level of 1.85 million tonnes, some 6 percent up on 2011 previous record output, mainly on account of prolonged and favourable monsoon rains. However, pocket areas reportedly suffered some wheat crop damage, due to hailstorms, insufficient rainfall and crop diseases.

Planting of the 2012 maize was completed in March, while that of rice and millet commenced in May and will last until August. Judging from satellite imagery, below normal rains were received from the end of April to mid June, which is likely to negatively impact maize crop, currently at the initial growing stage.

### 2011 cereal harvest estimated at record level of 9.3 million tonnes

The 2011 aggregate paddy output is officially estimated at a record level of 5.07 million tonnes, showing an increase of about 14 percent from 2010 good output. Similarly, the 2011 maize production is also estimated to reach the highest level at 2.2 million tonnes with an increase of 5.4 percent. The Ministry of Agriculture and Cooperatives estimates a bumper 2011 wheat crop, at a level of 1.75 million tonnes, 12 percent over the previous year's above-average output, following favourable precipitation and enlargement in the planted area.

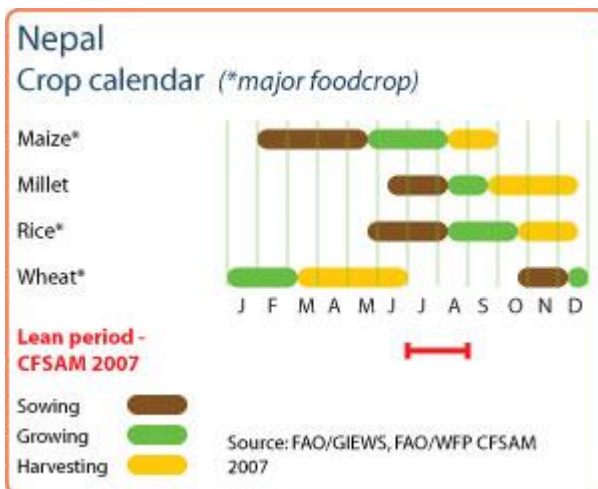
The 2011 total cereal production is estimated to reach record level at 9.3 million tonnes (including paddy). The generally favourable climate is the main reason behind the 11 percent increase in production in 2011.

Owing to the anticipated higher aggregate harvest and large carryover stocks in 2012, cereal imports for 2012/13 marketing year (July/June) are forecast to be lower than last year's level.

### Rice and wheat prices increase slightly in May

In the major consumer market of Kathmandu, prices of rice and wheat flour in May increased by some 3 percent, after being relatively stable for many months. The increase is the result of a series of general strikes which disrupted transport and market services across the country. Similarly, prices of vegetables increased, particularly those of potatoes which rose by more than 45 percent from April to May.

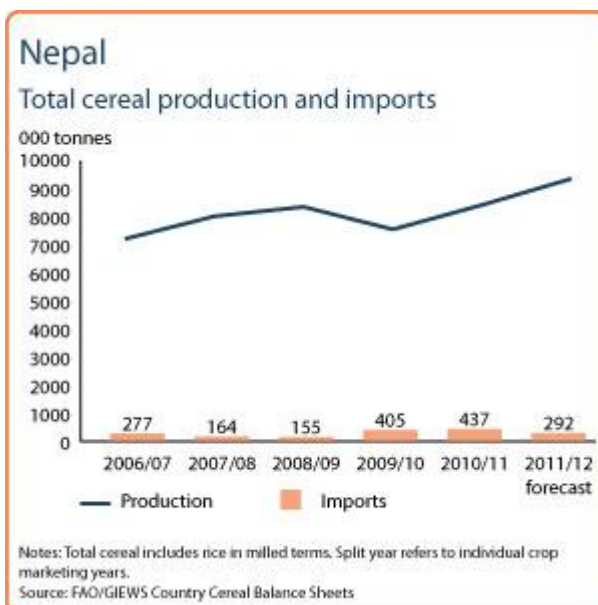
According to the latest Macroeconomic Situation report by Nepal Rastra Bank the annual consumer price inflation in May was 8.7 percent higher



### Nepal Cereal production

	2007-2011 average	2011	2012 forecast	change 2012/2011
	000 tonnes		percent	
Rice (paddy)	4 475	5 070	5 070	0
Maize	1 983	2 180	2 060	-6
Wheat	1 548	1 750	1 850	6
Others	329	350	330	-6
<b>Total</b>	<b>8 334</b>	<b>9 350</b>	<b>9 310</b>	<b>0</b>

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

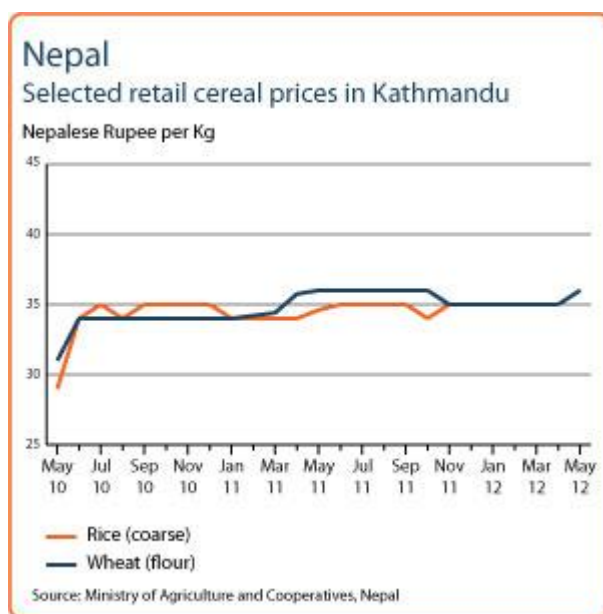
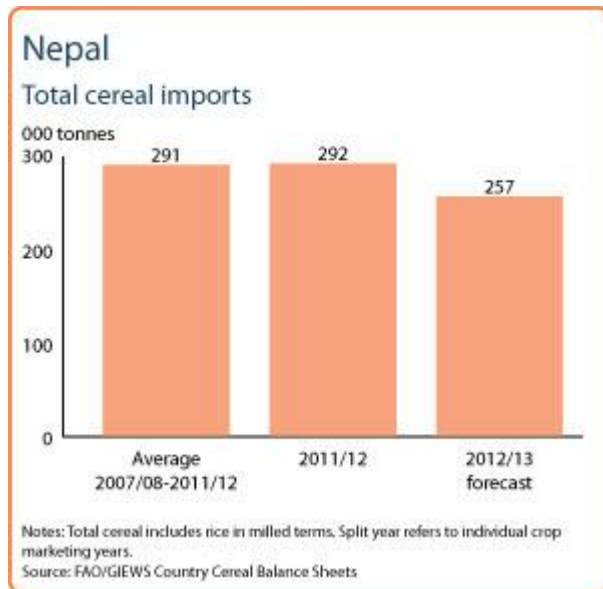




than the 7.5 percent rate recorded in mid-April. The food price inflation was estimated at 7.1 percent while that of non-food group was at 10.1 percent.

### The overall food security situation is favourable but concerns remain primarily for Darchula district

Overall, the food security situation in the country is satisfactory following the 2012 record crop harvest, improved employment opportunities provided by development programmes and relatively regular supply of food to the local markets. However, certain areas of Darchula district in Far Western Region suffered much reduced summer crop harvests on top of existing limited employment opportunities. The rising food prices and high general inflation result in reduced purchasing power and are a concern especially for the low income sections of the population especially the landless and small-holder communities.



Reference Date: 14-February-2012

### FOOD SECURITY SNAPSHOT

- Early prospects favourable for 2012 wheat crop
- 2011 cereal harvest estimated to reach record level at 9.3 million tonnes
- Prices of rice and wheat remain stable but experienced some fluctuation in November
- The overall food security situation is favourable but it remains a concern for certain districts due to low cereal production

### Early prospects favourable for 2012 wheat crop

Planting of the 2011/12 winter season crops, mainly wheat and barley, was completed in mid-December. The prolonged monsoon rains and favourable winter rainfall have had a beneficial impact on planting and early development of crops. A period of cold weather during the first half of December 2011 caused some crop damage in the Terai Belt.

### 2011 cereal harvest estimated to reach record level at 9.3 million tonnes

Harvesting of the 2011 main summer season crops, mainly paddy rice and millet, was completed in December.

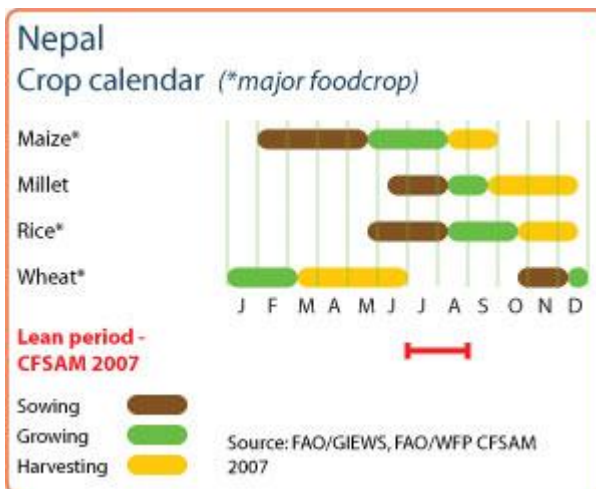
The 2011 aggregate paddy output is officially estimated at a record level of 5.07 million tonnes, showing an increase of about 14 percent from 2010 good output. Similarly, the 2011 maize production is also projected to reach the highest level at 2.2 million tonnes with an increase of 5.4 percent. According to the Ministry of Agriculture and Cooperatives the 2011 wheat production, the main winter crop, harvested by June is estimated at a record level of 1.75 million tonnes, 12 percent over the previous year's above-average output, following favourable precipitation and enlargement in the planted area.

The 2011 total cereal production is estimated to reach record level at 9.3 million tonnes (including paddy). The generally favourable climate is the main reason behind the 11 percent increase in production in 2011.

Owing to the improved aggregate harvest in 2011, the estimated cereal imports for 2011/12 marketing year (July/June) are forecast to be lower than the record imports in 2010/11.

### Prices of rice and wheat remain stable but experienced some fluctuation in November

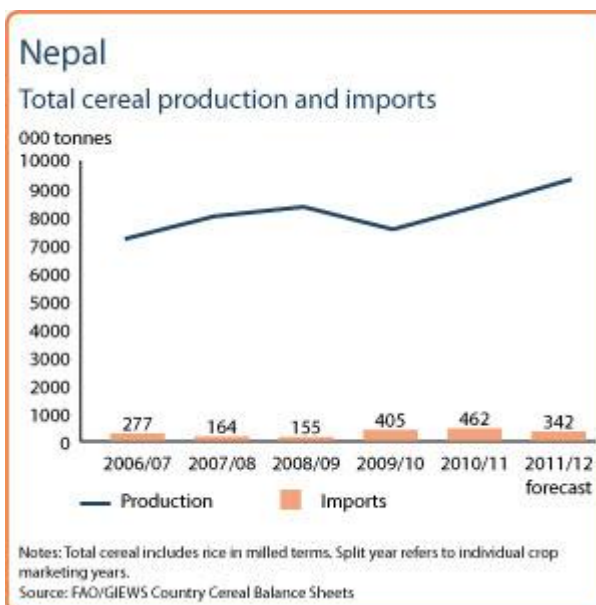
According to the Nepal Rastra Bank (National Bank) the year-on-year consumer price inflation increased to 8.5 percent in September 2011, almost the same as in the corresponding period of the previous year. However, the food and beverage group prices increased by 10.1 percent as opposed to the non-food and services price index increase of 7.2 percent. Price of rice in Kathmandu market has stabilized since June 2010 averaging around NPR 35 per kg. Similarly, the retail price of wheat flour in the capital city has remained high and stable for the last several months. However, in November 2011, it declined by 2.8 percent from the previous month.



### Nepal Cereal production

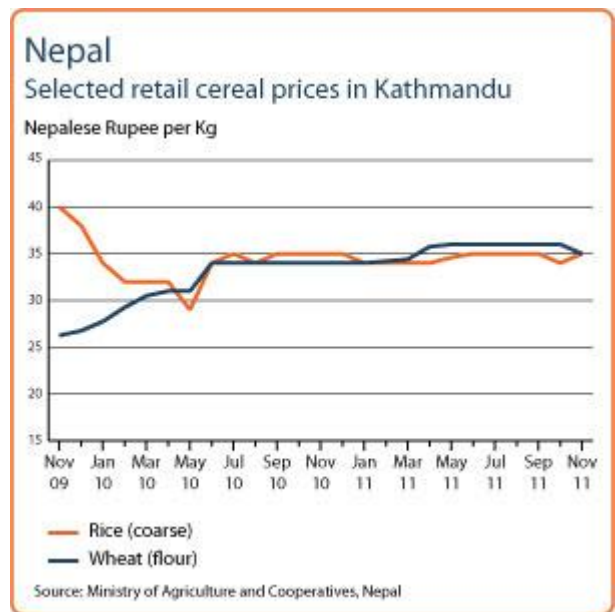
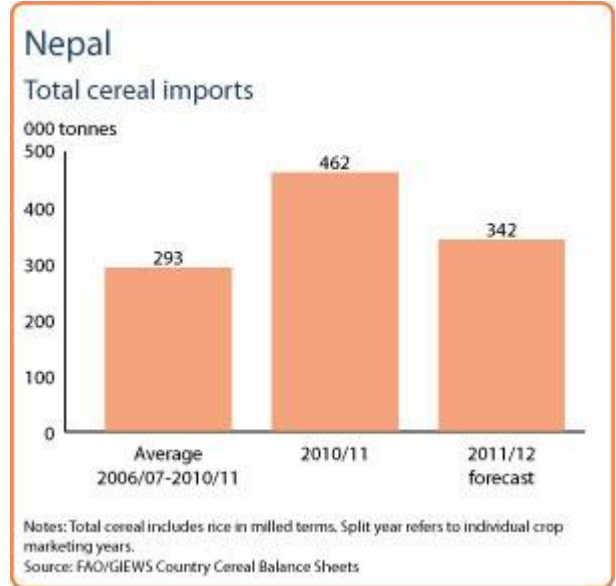
	2006-2010 average	2010	2011 estimate	change 2011/2010
	000 tonnes		percent	
Rice (paddy)	4 198	4 460	5 072	14
Maize	1 911	2 068	2 179	5
Wheat	1 476	1 557	1 750	12
Others	321	331	330	0
<b>Total</b>	<b>7 906</b>	<b>8 416</b>	<b>9 331</b>	<b>11</b>

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



**The overall food security situation is favourable but it remains a concern for certain districts due to low cereal production**

Overall, the food security situation in the country is satisfactory following the record crop harvest, improved employment opportunities provided by development programmes and relatively regular supply of food to the local markets. However, Jumla and Kalikot districts in the Mid-Western Mountain area, and Rukum and Jajarkot districts in the Mid-Western Hill area experienced much reduced harvests. The rising food prices and high general inflation result in reduced purchasing power and are a concern especially for the low income sections of the population especially the landless and small-holder communities.



Reference Date: 19-December-2011

### FOOD SECURITY SNAPSHOT

- 2011 cereal harvest estimated to reach record level at 9.3 million tonnes
- Prices of rice and wheat remain stable but experienced some fluctuation in November
- The overall food security situation is generally favourable, with some concerns for Saptari district, Eastern Hill and Mountain districts

### 2011 cereal harvest estimated to reach record level at 9.3 million tonnes

Sowing of the 2011/12 winter wheat crop has recently been completed and harvesting of the 2011 main summer season crops, mainly paddy rice and millet, is nearly completed.

The 2011 aggregate paddy output is officially estimated at a record level of 5.07 million tonnes, showing an increase of about 14 percent from the previous year's good output. Similarly, the maize production for the current year is also projected to reach the highest level at 2.2 million tonnes with an increase of 5.4 percent. According to the Ministry of Agriculture and Cooperatives the 2011 wheat production, the main winter crop, harvested by June is estimated at a record level of 1.75 million tonnes, 12 percent over the previous year's above-average output, following favourable precipitation and enlargement in the planted area.

The 2011 total cereal production is estimated to reach record level at 9.3 million tonnes (including paddy). The generally favorable climate is the main reason behind the 11 percent increase in production in 2011.

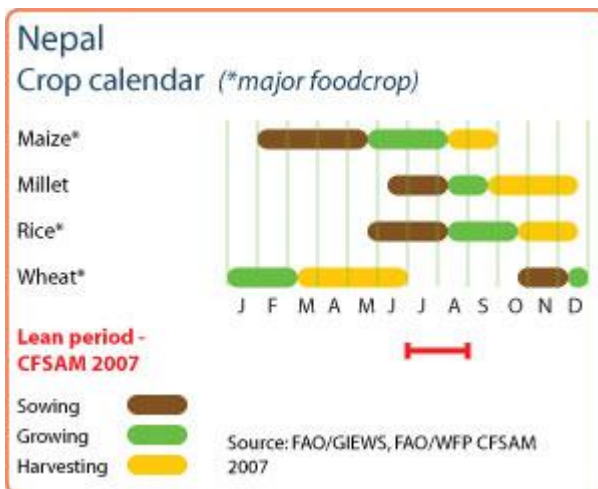
Owing to the improved aggregate harvest in 2011, the estimated cereal imports for 2011/12 marketing year (July/June) are forecast to be lower than the record imports in 2010/11.

### Prices of rice and wheat remain stable but experienced some fluctuation in November

According to the Nepal Rastra Bank (National Bank) the year-on-year consumer price inflation increased to 8.5 percent in September 2011, almost the same as in the corresponding period of the previous year. However, the food and beverage group prices increased by 10.1 percent as opposed to the non-food and services price index increase of 7.2 percent. Price of rice in Kathmandu market has stabilized since June 2010 averaging around NPR 35 per kg. Similarly, the retail price of wheat flour in the capital city, has remained high and stable for the last several months. However, in November 2011, it declined by 2.8 percent from the previous month.

### The overall food security situation is generally favourable, with some concerns for Saptari district, Eastern Hill and Mountain districts

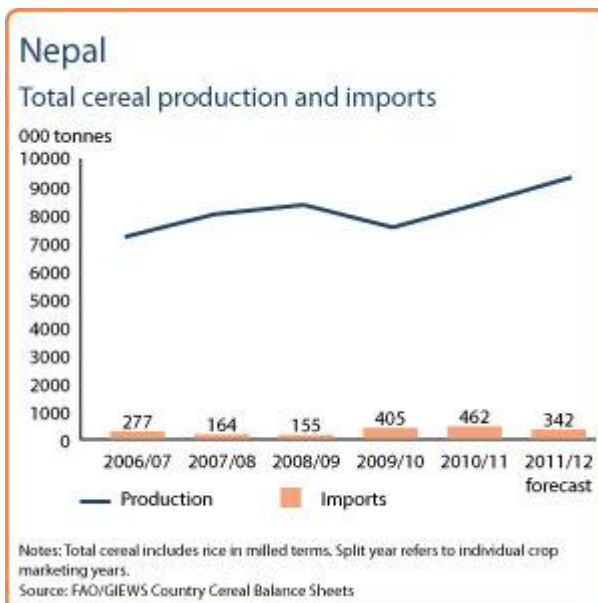
Overall, the food security situation in the country is satisfactory following the record crop harvest, improved employment opportunities provided by



### Nepal Cereal production

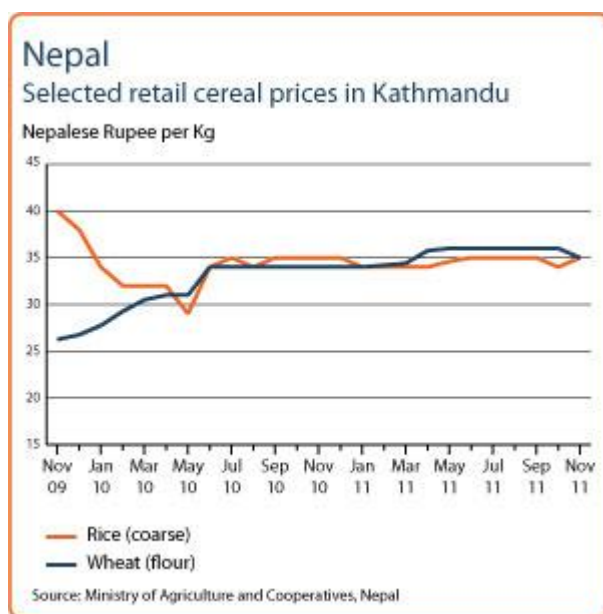
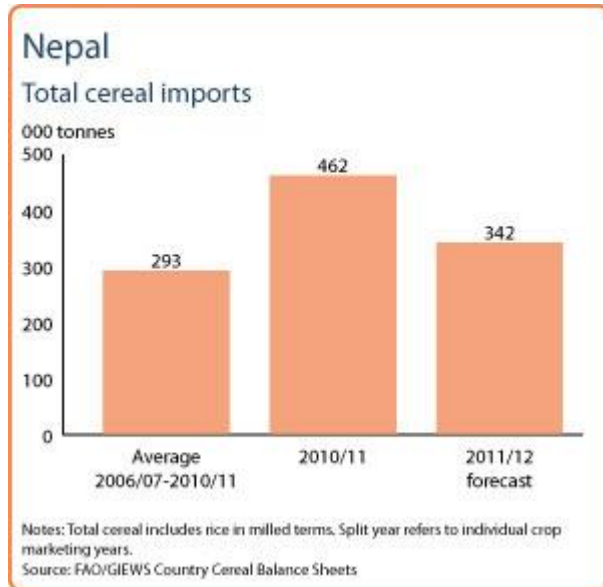
	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes		percent	
Rice (paddy)	4 198	4 460	5 070	14
Maize	1 911	2 068	2 179	5
Wheat	1 476	1 557	1 750	12
Others	321	331	330	0
<b>Total</b>	<b>7 906</b>	<b>8 416</b>	<b>9 329</b>	<b>11</b>

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



development programmes and relatively regular supply of food to the local markets. However, rising food prices and high general inflation result in reduced purchasing power and are a concern especially for the low income sections of the population.

Pockets of food insecurity exist particularly in the south-western part of the Saptari district, in the Eastern Hill and Mountain districts. The most vulnerable to food deficit are the landless and small-holder communities.





Reference Date: 25-May-2011

### FOOD SECURITY SNAPSHOT

- Early estimates of 2011 winter wheat harvest show a record production
- Currently the food price inflation is much higher than non-food price inflation
- Over all food supply security situation is improving but high cost of food is a concern especially for the low income population

### Early estimates of 2011 wheat harvest indicate significant improvement

Harvesting of the 2011 winter crops, mainly wheat, is completed in the low lying areas and will continue until the end of June in the hilly areas. The early estimates point to a record wheat harvest at 1.74 million tonnes, some 12 percent increase over the good outcome of 2010. The rainfall during the first half of the season was below normal but good soil moisture from the last year's extended monsoon season and favourable precipitation in January-February 2011 was beneficial. The Ministry of Agriculture and Cooperatives reported that the area planted to wheat this season increased. Maize crop is currently being planted under normal conditions and planting of the main staple crop, paddy rice, is beginning.

The 2010 total cereal production is estimated at 8.4 million tonnes (including paddy), a recovery from the drought affected 2009 output. The generally favourable monsoon season last year was the main reason behind the eight percent increase in production in 2010. The 2009 cereal production itself was some 8 percent below the bumper harvest of 2008.

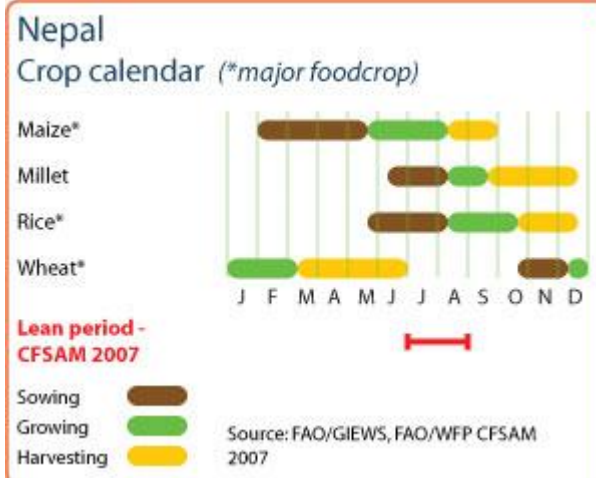
Owing to the improved aggregate harvest in 2010, the estimated cereal imports for 2010/11 marketing year (July/June) are estimated to be lower than the record imports in 2009/10. The Government of India partially lifted its wheat export ban, allowing the sale of 250 000 tonnes of wheat to Nepal at cost price.

### Currently the food price inflation is much higher than non-food price inflation

According to the Nepal Rastra Bank (National Bank) the year-on-year consumer price inflation increased to 10.7 percent in mid-March 2011 down from 11.3 percent in mid-January 2011. However, the food and beverage group prices increased by 17.3 percent as opposed to the non-food and services price index increase of 5.3 percent. In particular, prices of rice in Kathmandu market have stabilized since the beginning of this year but wheat flour prices rose in April from a relatively stable level for almost a year.

### Food security situation improving

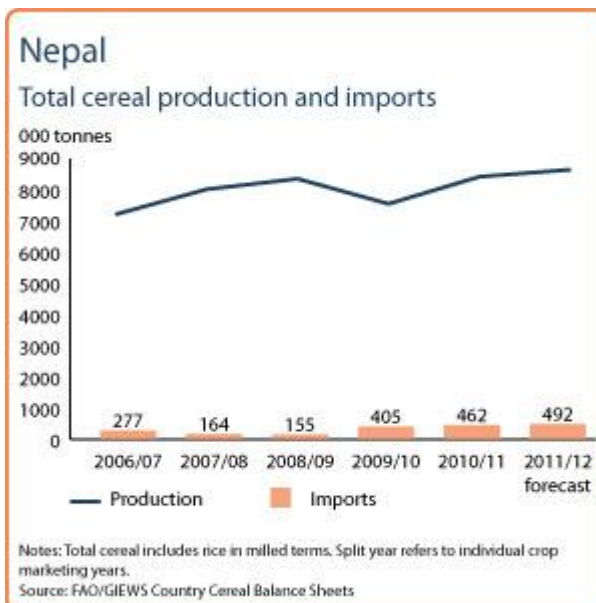
The increased food production in 2010 has improved food supply situation in general. However, rising food prices and high general inflation resulting in reduced purchasing power are a concern especially for the low income sections of the population. Findings of a joint Government/FAO/WFP/Government crop assessment report of February 2011 indicates that in spite of the overall good production at the national level, given the large geographic disparities in production and yields,



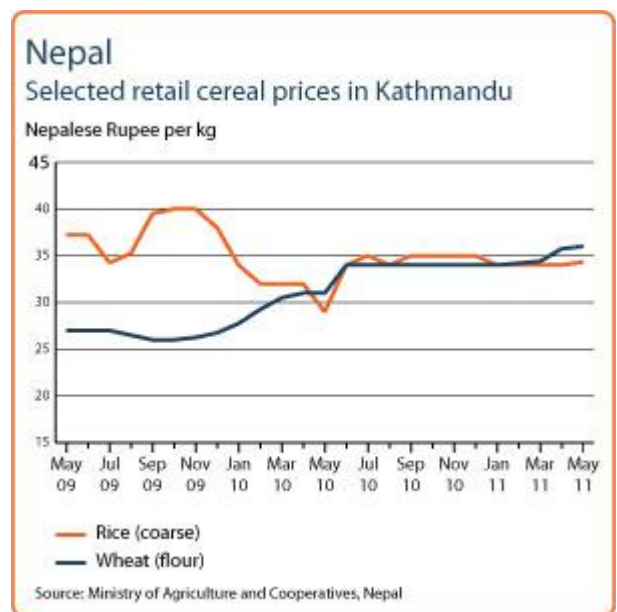
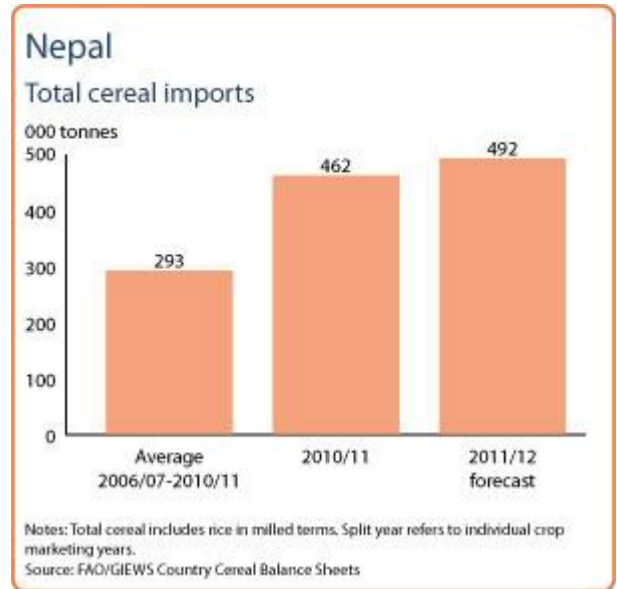
### Nepal Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes		percent	
Rice (paddy)	4 198	4 460	4 500	1
Maize	1 911	2 068	2 070	0
Wheat	1 476	1 557	1 740	12
Others	294	303	300	-1
<b>Total</b>	<b>7 906</b>	<b>8 416</b>	<b>8 640</b>	<b>3</b>

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



some areas in Nepal, particularly in the Eastern Terai districts of Saptari and Siraha, and in the Mid- and Far-Western hills and mountains are likely to face food deficits leading to food insecurity, especially for the most vulnerable populations.



Reference Date: 7-April-2011

### FOOD SECURITY SNAPSHOT

- Prospects for 2011 winter wheat harvest are favourable.
- Rice and wheat prices in Kathmandu in February 2011 were 20 percent higher than the levels a year earlier.
- Over all food supply is improving but high cost of food is a concern especially for the low income population.

### Favourable prospects for the 2011 winter wheat harvest

Harvesting of the winter crops, mainly wheat, is currently underway in the low lying areas and will continue until the end of June in the hilly areas. The rainfall during the first half of the season has been below normal but good soil moisture from the last year's extended monsoon season and favourable precipitation in January-February 2011 overall benefited crops. The Ministry of Agriculture and Cooperatives reports that the area planted to wheat this season increased. The early forecast indicates a 2011 wheat crop above the average of the previous five years.

The 2010 total cereal production is estimated at 8.23 million tonnes (including paddy), a recovery from the drought affected 2009 output. The generally favourable monsoon season last year was the main reason behind the eight percent increase in production in 2010. The 2009 cereal production itself was some 8 percent below the bumper harvest of 2008.

### Cereal imports expected to come down in 2010/11 but still remain above average

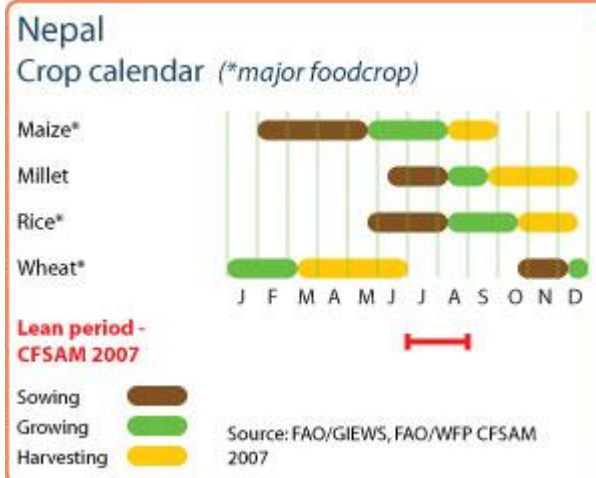
Owing to the improved aggregate harvest in 2010, the estimated cereal imports for 2010/11 marketing year (July/June) are estimated to be lower than the record imports in 2009/10. The Government of India partially lifted its wheat export ban, allowing the sale of 250 000 tonnes of wheat to Nepal at cost price.

### Food price inflation is much higher than the non-food price inflation

According to the Nepal Rastra Bank (National Bank) the year-on-year consumer price inflation increased to 11.3 percent in mid-January 2011 from 10.7 percent at the same time year before. However, the food and beverage group prices increased by 17.6 percent as opposed to the non-food and services price index increase of 6.2 percent. In particular, prices of rice and wheat in February 2011 in the capital city Kathmandu were 22 and 20 percent higher than their respective levels a year earlier.

### Food security situation improving

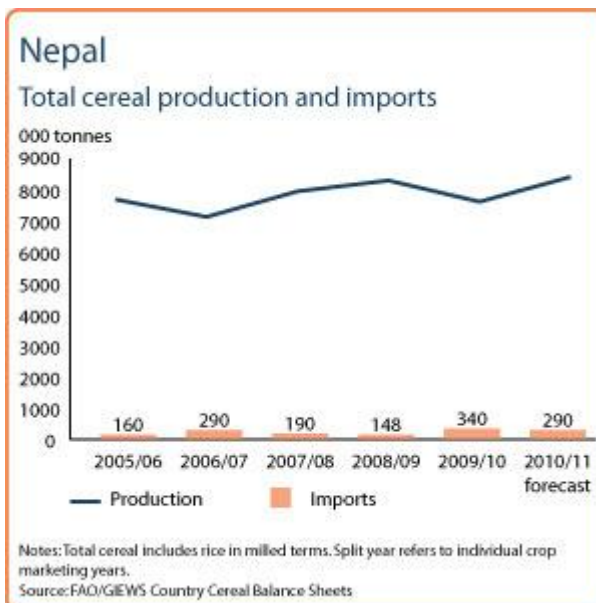
The increased food production in 2010 has improved food supply situation in general. However, rising food prices and high general inflation resulting in reduced purchasing power are a concern especially for the low income sections of the population. Preliminary findings of a joint Government/FAO/WFP crop assessment report of February 2011 indicates that in spite of the overall good production at the national level, given the large geographic disparities in production and yields, some areas in Nepal, particularly in the Eastern Terai districts of Saptari and



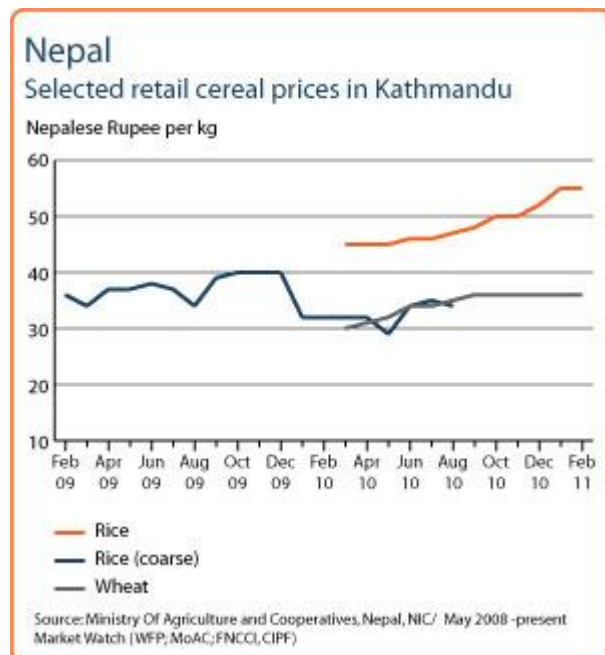
### Nepal Cereal production

	2005-2009 average	2009	2010 estimate	change 2010/2009
	000 tonnes			percent
Rice (paddy)	4147	4024	4460	11
Maize	1816	1931	2068	7
Wheat	1454	1344	1550	15
Others	318	316	330	4
<b>Total</b>	<b>7735</b>	<b>7614</b>	<b>8408</b>	<b>10</b>

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



Siraha, and in the Mid- and Far-Western hills and mountains are likely to face food deficits leading to food insecurity, especially for the most vulnerable populations.





Reference Date: 2-September-2010

### FOOD SECURITY SNAPSHOT

- 2010 main season crops growing under normal rainfall conditions.
- Food prices are still high and are rising in recent months
- Over all food security situation is improving except in certain pockets of vulnerable areas.

### 2010 main season crops growing under normal conditions

The main monsoon season cereals, rice, maize and millets are growing under normal rainfall conditions, especially in the major crop producing areas (the southern plains) of the country. Rains have been erratic in the northern hilly areas. Overall prospects for national harvest are considered to be favourable.

Production of winter wheat, harvested by June-July is officially estimated at a record level of 1.55 million tonnes, presenting some 15 percent recovery from the previous year's drought affected output.

Rice (paddy) production for 2009 was officially estimated at about 4 million tonnes significantly lower than in the previous year due to unfavourable weather. The 2009 winter crop was also affected by poor weather, particularly in districts in Far-and Mid-Western Hills, where wheat is the first or second most important crop. The total cereal harvest for 2009 is estimated at 7.5 million tonnes, some 8 percent below the previous year's bumper crop.

### Higher cereal imports in 2009/10 but expected to come down in 2010/11

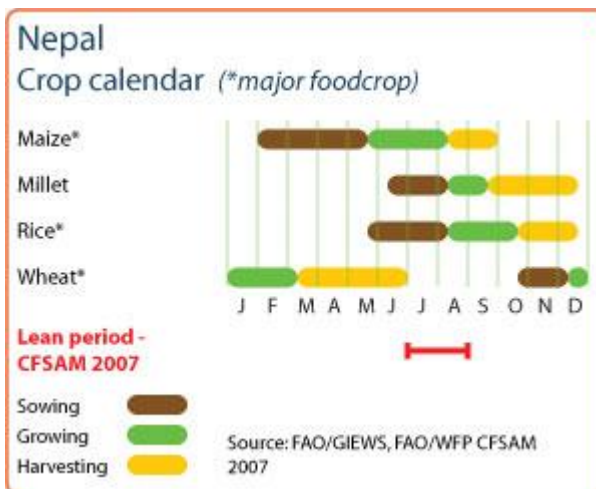
Owing to the reduced aggregate harvest, the estimated cereal imports for 2009/10 marketing year (July/June) increased significantly. The Government of India partially lifted wheat export ban, allowing the sale of 250 000 tonnes of wheat to Nepal at cost price. For the new marketing year, with a record winter wheat crop and favourable summer season crops, the import requirements are expected to go down.

### Prices of rice and wheat have been rising in recent months

Prices of staple commodity rice in Kathmandu, after having come down from a peak of NPR 40/kg in December 2009 to NPR 29 in May 2010, have now increased by some 20 percent in last three months. The pre-high-food-prices crisis level was around NPR 30, in July 2010 it reached NPR 30. Retail prices of wheat flour in the capital city are steadily rising more in line with wheat prices in India following a fairly stable price since the beginning of 2009 after much volatility during 2008. They have increased by about 10 percent between May and August 2010.

### Food security situation improving

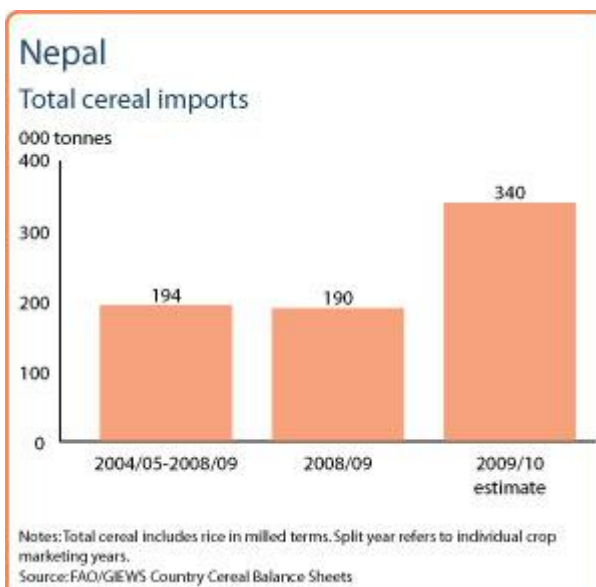
Although wheat production accounts for less than 20 percent of total annual cereal production, with the 2010 bumper wheat harvest food security in general has improved. However, given that the main paddy crop of 2009 was reduced by drought, food security situation in many



### Nepal Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Rice (paddy)	4147	4024	4300	7
Maize	1823	1855	1900	2
Wheat	1409	1344	1550	15
Others	321	323	320	-1
<b>Total</b>	<b>7701</b>	<b>7546</b>	<b>8070</b>	<b>7</b>

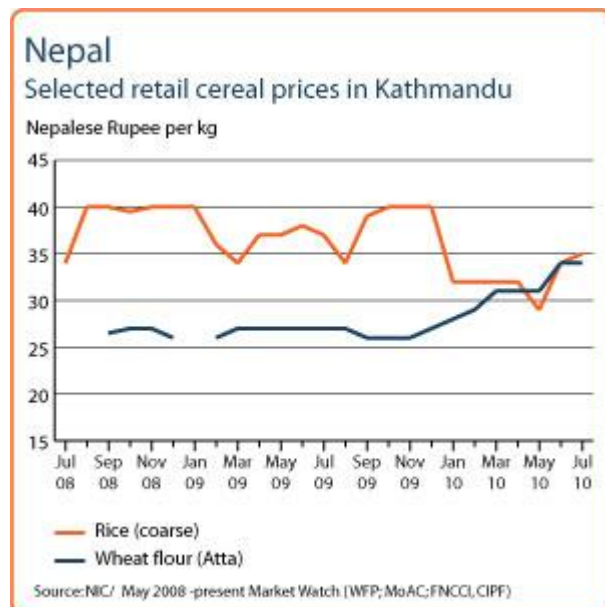
Note: percentage change calculated from unrounded data.  
Source: FAO/GIEWS Country Cereal Balance Sheets





parts of the country remains a concern especially for the vulnerable groups. Rice price increases in last three months are likely to increase burden on the food budgets of the poor. Situation needs to be monitored closely.

A 26-month project funded by the European Commission was approved to mitigate the negative effects of high food prices on local populations in ten most-affected districts in the Eastern, Central, Mid-Western and Far-Western Regions of Nepal.



Reference Date: 13-July-2010

### FOOD SECURITY SNAPSHOT

- 2010 winter wheat crop is estimated at a record level of about 1.5 million tonnes
- Food prices are still high, especially in remote regions
- Over all food security situation is improving except in certain pockets of vulnerable areas.

### 2010 winter wheat crop is estimated at a record level of 1.5 million tonnes

Harvesting of the winter wheat crop is nearly completed. The preliminary estimate of the harvest according to the Ministry of Agriculture is 1.49 million tonnes, some 11 percent recovery from the previous year's drought affected output. Planting of summer crops, mainly rice and millets, has started from June where monsoon rains have begun. Normal performance of Monsoon rains is forecast for this year.

### 2009 cereal harvest estimated at below 2008 level

The 2009 rice paddy production is officially estimated at about 4 million tonnes significantly lower than in the previous year due to unfavourable weather. The 2009 winter crop was also affected by poor weather, particularly in districts in Far-and Mid-Western Hills, where wheat is the first or second most important crop. The total cereal harvest for 2009 is estimated at 7.8 million tonnes, some 5 percent below the previous year's bumper crop.

### Higher cereal imports in 2009/10

Owing to the reduced aggregate harvest, the cereal imports for 2009/10 marketing year (July/June) are expected to increase significantly. The Government of India has partially lifted wheat export ban, allowing the sale of 250 000 tonnes of wheat to Nepal at cost price.

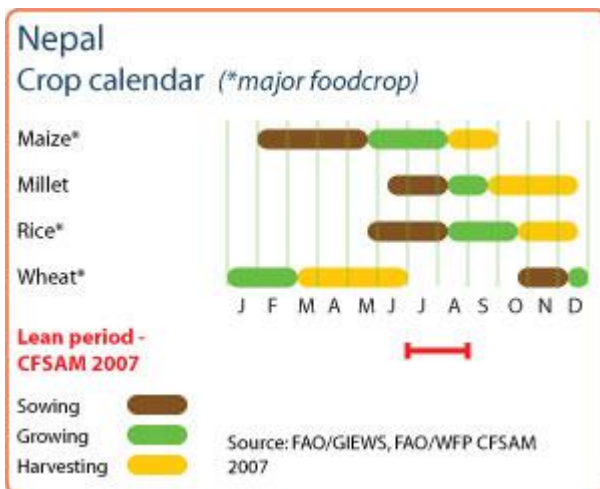
### Rice prices have declined significantly in recent months but those of wheat are rising

Prices of staple commodity rice, lately have come down along with the decline in international price of rice. Earlier, during September to December 2009 period rice prices in Kathmandu had reached a high food prices crisis level of NPR 40/kg. The pre-high-food-prices crisis rice level was around NPR 30. Prices in last few months have come down with May price at about NPR 29. Retail prices of wheat flour in the capital city are steadily rising more in line with wheat prices in India following a fairly stable price since the beginning of 2009 after much volatility during 2008.

Typically food prices remain extremely high in the winter drought-affected remote hill regions.

### Food security situation improving

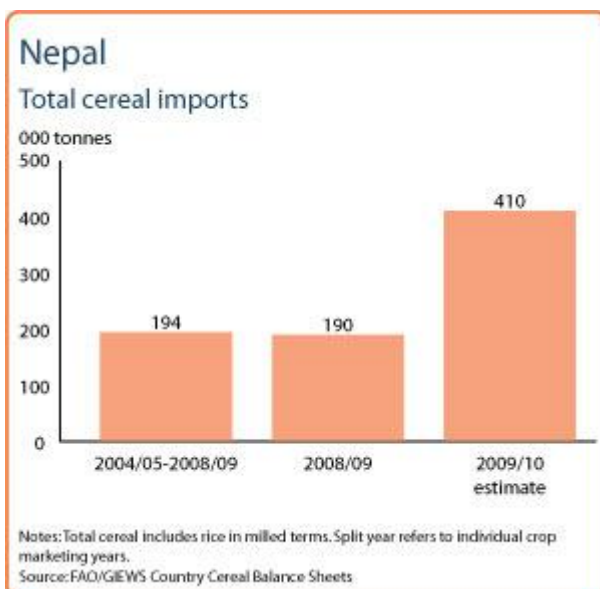
Although wheat production accounts for less than 20 percent of total annual cereal production, with the 2010 bumper wheat harvest food security in general is improving. However, given that the main paddy crop of 2009 was reduced by drought, food security situation in many parts of



### Nepal Cereal production

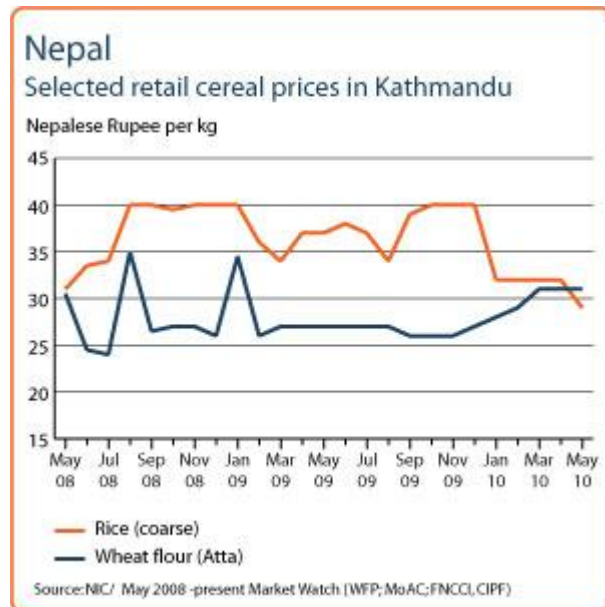
	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Rice (paddy)	4147	4024	4300	7
Maize	1823	1855	2000	8
Wheat	1409	1344	1550	15
Others	321	323	320	-1
<b>Total</b>	<b>7701</b>	<b>7546</b>	<b>8170</b>	<b>8</b>

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



the country remains a concern especially for the vulnerable groups although the recent decline in rice price has provided some relief.

A 26-month project funded by the European Commission was approved to mitigate the negative effects of high food prices on local populations in ten most-affected districts in the Eastern, Central, Mid-Western and Far-Western Regions of Nepal.



Reference Date: 02-March-2010

### FOOD SECURITY SNAPSHOT

- Total cereal harvest of 2009 lower than in 2008 but near-average
- Food prices are still high, especially in remote regions
- Food security situation deteriorated in parts

### Early prospects favourable for 2010 wheat crop

The winter season 2009/10 wheat crop was planted around November 2009 and reportedly is growing under favourable weather conditions.

### 2009 cereal harvest estimated at below 2008 level

The 2009 rice paddy production is officially estimated at about 4 million tonnes significantly lower than in the previous year due to unfavourable weather. Harvesting of the 2009 main summer season crops was completed towards the end of last year. The 2009 winter crop was also affected by poor weather, particularly in districts in Far-and Mid-Western Hills, where wheat is the first or second most important crop. FAO estimates the total cereal harvest for 2009 at 7.8 million tonnes, some 5 percent below the previous year's bumper crop.

### Higher cereal imports in 2009/10

Owing to the reduced aggregate harvest, the cereal imports for 2009/10 marketing year (July/June) are expected to increase significantly. The Government of India has partially lifted wheat export ban, allowing the sale of 50 000 tonnes of wheat to Nepal at cost price.

### Rice prices have risen significantly in recent months

Prices of staple commodity rice, have increased since August 2009 and have remained high at very high level since October; the December price in Kathmandu market as of December 2009 had reached the earlier peak level of NPR 40/kg. The pre-high-food-prices crisis rice level was around NPR 30. Retail prices of wheat flour in the capital city, on the other hand, have remained fairly stable since the beginning of 2009 after much volatility during 2008.

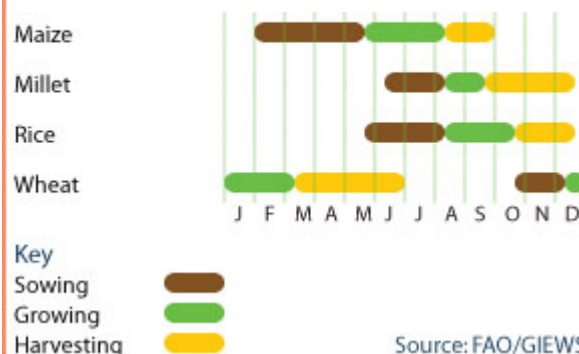
Typically food prices remain extremely high in the winter drought-affected remote hill regions.

### Food security situation deteriorated sharply

Following the steep wheat crop losses in 2009 and disappointing harvest of the summer crops, the current food security situation in many parts of the country has deteriorated. The vulnerable people affected by the high food prices and natural shocks require assistance.

In the distinct most affected by a reduced food production in 2008 and 2009, households are expected not to have sufficient purchasing power to procure food or not to have adequate access, due to relative high transportation costs and poorly integrated markets. A 26-month project

### Crop calendar Nepal

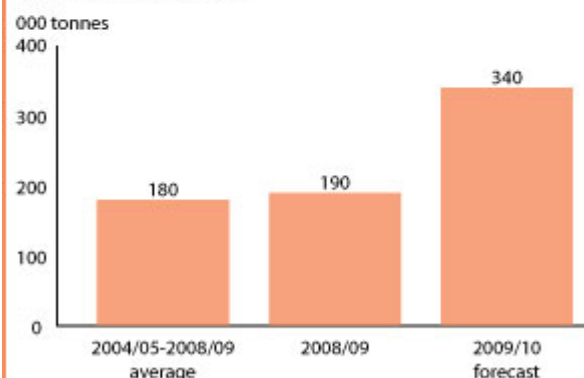


### Nepal Cereal production

	2004-2008 average	2008	2009 estimate	change 2009/2008
	000 tonnes			percent
Rice (paddy)	4200	4524	4024	-11
Maize	1770	1931	2119	10
Wheat	1418	1409	1344	-5
Others	320	323	323	0
<b>Total</b>	<b>7708</b>	<b>8186</b>	<b>7809</b>	<b>-5</b>

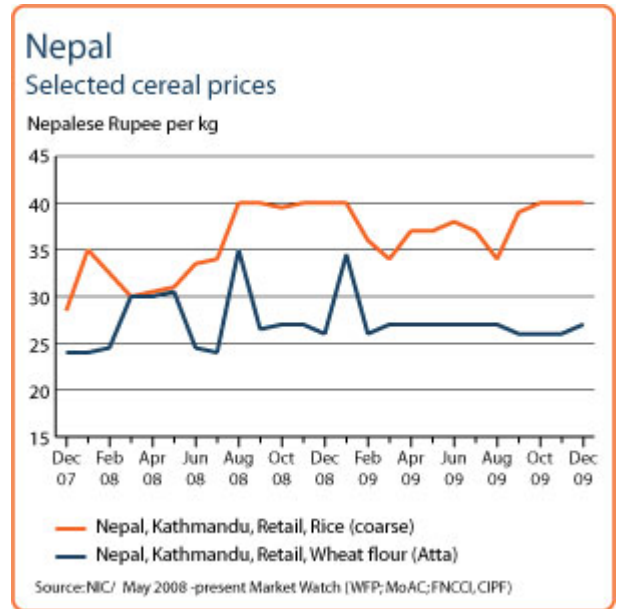
Note: percentage change calculated from unrounded data.

### Total cereal imports



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

funded by the European Commission has been approved to mitigate the negative effects of high food prices on local populations in ten most-affected districts in the Eastern, Central, Mid-Western and Far-Western Regions of Nepal.





Reference Date: 07-October-2009

### FOOD SECURITY SNAPSHOT

- 2009 winter cereal crops severely affected by winter drought
- Planting of the 2009 paddy crop completed and harvesting of maize is underway
- Food prices are still high, especially in remote regions
- Food security situation deteriorated sharply

### The 2009 winter wheat production reduced by drought

Harvesting of the 2009 winter cereal crops was completed in May. Production of wheat, the main winter crop, is estimated at 1.340 million tonnes, a decrease of about 14.5 percent from the previous year as a result of a severe drought. The 2009 output of barley is estimated at 23 000 tonnes, 17.3 percent below that of the previous year.

Districts most affected by a reduced harvest are those in Far-and Mid-Western Hills and Mountains, where wheat is the first or second most important crop and losses are estimated at 50 percent or higher in many districts.

### Average 2009 maize and paddy crops forecast

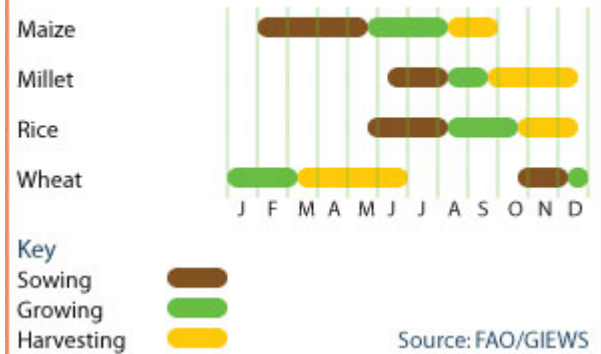
Sowing of the 2009 paddy crop has been completed. Late monsoon rains have led to reductions in paddy cultivation and the output is tentatively forecast below the good output record in the previous year. Harvesting of the 2009 maize crop was just completed and production is provisionally forecast to be about average at 1.4 million tonnes.

### Food prices are still high, especially in remote regions

Food staple prices have declined, but remain higher in comparison to the pre-2008 food-crises levels. The retail price of rice in Kathmandu was 34 rupee/kg in August 2009, 15 percent below the peak in August 2008, but still 28 percent higher compared to that in August 2007 (see chart). The retail price of wheat flour in Kathmandu was reported at 27 rupee/kg in August 2009, 23 percent below that in August 2008, but 12.5 percent above that in August 2007.

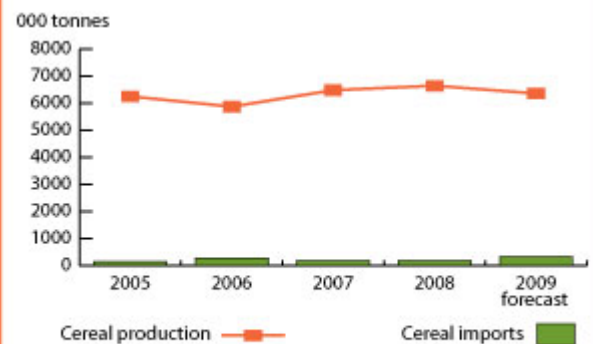
Food prices remain extremely high in the winter drought-affected remote hill regions. In the districts most affected by a reduced food production in 2008 and 2009, households are expected not to have sufficient purchasing power to procure food or not to have adequate access, due to relative high transportation costs and poorly integrated markets. It is estimated that over 2 million people in rural areas are in need of food assistance. A 26-month project funded by the European Commission has been approved to mitigate the negative effects of high food prices on local populations in ten most-affected districts in the Eastern, Central, Mid-Western and Far-Western Regions of Nepal.

### Crop calendar Nepal



### Cereal production and imports Nepal

Cereal production	2004-2008	2008	2009	change
	average		forecast	2009/2008
	000 tonnes			percent
Rice (milled)	2772	2986	2772	-7.2%
Maize	1770	1932	1931	-0.1%
Wheat	1418	1409	1344	-4.6%
Other	317	323	316	-2.2%
<b>Total Cereals</b>	<b>6278</b>	<b>6650</b>	<b>6363</b>	<b>-4.3%</b>



Source: FAO/GIEWS Country Cereal Balance Sheets

## Food security situation deteriorated sharply

Following the steep wheat crop losses, the current food security situation in many part of the country has deteriorated sharply in comparison with last year. The winter drought has reportedly added approximately 700 000 to the 2.7 million people who were already identified as in food insurity and need immediate assistance due to the impact of high food prices and previous natural shocks.

