

Food Security Bulletin

Edition no. 24: July - September 2021

Highlights

- According to Ministry of Agriculture and Fisheries, rice production in 2021 is estimated at 72,077 metric tonnes, 44 percent higher than the previous period and almost double the five-year average. National rice requirement is around 140,000 metric tonnes.
- Maize is estimated at 85,627 metric tonnes, 10 percent higher than last year and 3 percent more than the five-year average.
- Rice imports increased by 84 percent in quarter three compared to the previous period at 59,427 metric tonnes.
- The National Logistics Centre (NLC), Government arm responsible for strategic grain reserves had 9,807 MT of rice as opening stocks in quarter 3, of which a significant amount went into market intervention (58%) and humanitarian assistance (19%).
- Price of imported rice continued to trend above the two-year average and above last year's levels during the reference period. However, the downward trajectory continued to be observed. Similarly, downward trends were observed for the price of local rice.
- At the end of third Quarter, the Vegetation Health Index (VHI) ranged from 0.55 to 0.85 (green). Seasonally, indicative of good conditions to a start of the agricultural season.

Methodology

This Food Security Bulletin (FSB) is based on data emanating from institutions under the KONSSANTIL (Inter-Minister Council for Food Security, Food Sovereignty and Nutrition). The FSB is a product of the MAF as the lead and secretariat of KONSSANTIL with technical support from World Food Programme (WFP) and

Food and Agriculture Organisation of the United Nations (FAO) as part of the National Information and Early Warning System (NIEWS).

Rice and Maize production

Rice production in 2021 is estimated 72,077 metric tonnes, 44 percent higher than 2020 levels. The three municipalities of Baucau, Viqueque and Bobonaro account for nearly half of the overall production (Table 1).

Maize production, another key staple, is estimated at 85,627 metric tonnes, 10 percent higher than last year and 3 percent more than the five-year average. The two municipalities of Baucau and Oecusse account for nearly one third of the total maize production. The national annual requirement is pegged at around 75,000 metric tonnes, indicating surplus for maize.

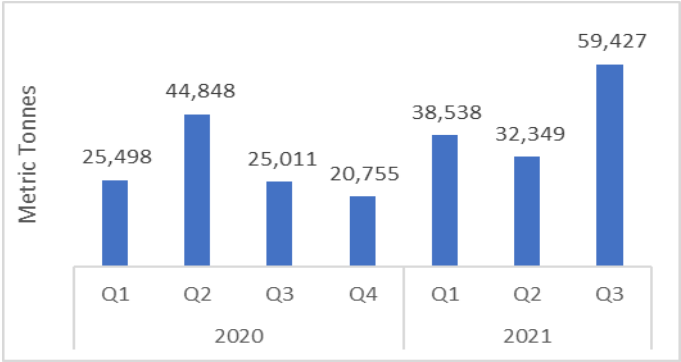
Table 1: Rice and Maize Production Estimation (MT)

Municipality	Rice	Maize
Baucau	20,648	16,010
RAEOA	10,494	10,696
Covalima	6,986	9,514
Bobonaro	12,737	8,739
Aíleu	757	4,395
Liquiça	383	6,349
Aínaro	1001	5,967
Ermera	1,692	5,577
Lautem	1,701	5,371
Manufahi	1,233	5,104
Viqueque	11,940	4,689
Manatuto	2,480	2,469
Díli	25	747
Total	72,077	85,627

Rice Imports

A total of 59,427 metric tonnes were imported in the third quarter, an increase of 84 percent compared to the previous period (Figure 1). Overall, 130,314 metrics tonnes have been imported as of end of third quarter, 34 percent more than the corresponding period in 2020.

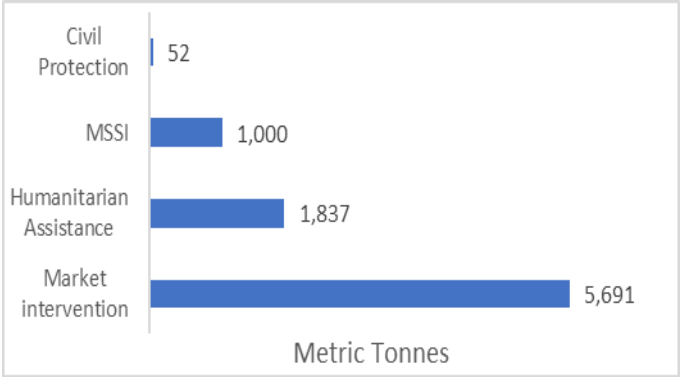
Fig 1: Rice imports (metric tonnes)



Rice distributions by NLC and Ministry of Social Solidarity and Inclusion (MSSI)

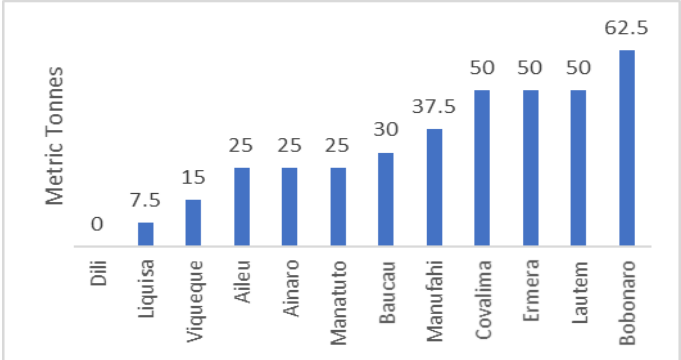
National Logistics Centre, a government arm responsible for grain reserves, had 9,807 metric tonnes of rice as opening stocks at the start of third quarter. A significant amount went into market intervention (58 %) and Humanitarian assistance (19 %), Contributions towards Civil Protection (CP) and Ministry of Social Solidarity and Inclusion (MSSI) accounted for 10 percent and 1 percent, respectively (Figure 2).

Fig 2. Rice distribution by NLC (mt)



At municipality level, the MSSI distributed a total of 377.5 metric tonnes of rice (that it received from NLC) directly to the municipalities to support the most vulnerable population (Figure 3).

Fig 3: MSSI rice distribution by Municipality (mt)



More than half of the rice was distributed to Bobonaro, Lautem, Covalima, Ermera and Manufahi municipalities.

Other food imports

Besides rice, the other most imported food commodities are chicken, wheat and vegetable oil (Table 2).

Table 2: Other Food Imports (MT)

	2021				2020	
Imports	Q3	Q2	Q1	Q4	Q3	Q3
Chicken	4,383	35	-1	-7	-7	11
Wheat	4,269	5	22	-7	-18	
Vegetable Oil	3,438	54	6	12	-11	
Beef	188	200	64	2142	350	
Eggs	527	-4	-28	-13	28	
Fish	237	-82	-53	-76	-77	
Pork	180	117	-21	253	161	

Source: Customs-MoF

Agriculture Exports

Arabica Coffee was the most exported agriculture commodity during the reference period, at 954 metric tonnes which is nearly seven times more than the previous quarter. Seasonally, coffee exports tend to be relatively high in the second half of the year. Candlenut exports dropped sharply at 426 metric tonnes from previous quarter. Dry coconut (277 mt) and Konjac (37 mt) were the other two most traded commodities (Table 3).

Table 3. Agriculture Exports (mt)

	Q3	Q2	Q1	Q4	Q3
Arabica Coffee	954	591	200	2020	-37
Candlenut	426	-63	69	484	-2
Dry Coconut	277	-38	39	159	-29
Konjac	37	-88	-64		
Robusta Coffee	0.04	100	-100	-100	-100

Food Access

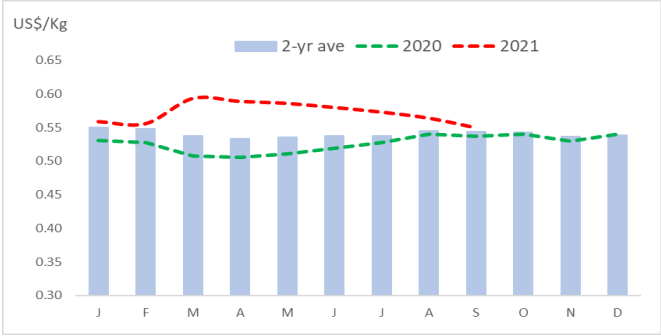
Nominal Price of Rice

As a measure of food access, rice price analysis for both imported and locally produced has been used.

Overall, imported rice continue to trend above the two-year average and above last year's levels.

However, it's on a downward trajectory where at the end of the third quarter, the nominal price was observed at US\$ 0.55 per kilogram which is 5 percent lower than at the end of the second quarter (Figure 4).

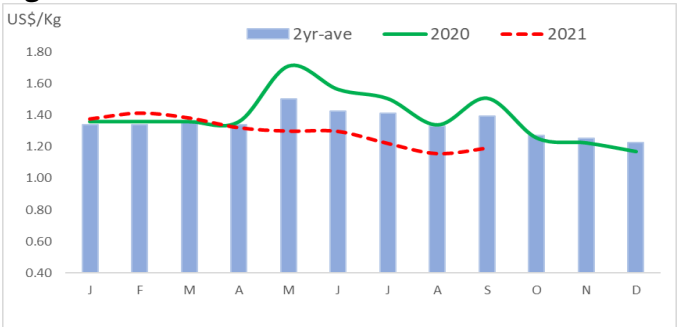
Fig 4: Nominal Price Trend of Imported Rice



Similarly, the third quarter of 2021 have seen price decline for the local rice compared to the previous period. However, an uptick at the end of September was observed, likely due to increased demand emanating from direct Government purchase of local rice from the farmers through NLC,

In September, end of the third quarter, local rice was being sold at US\$ 1.19 per kilogram, 3 percent higher than the previous month but 8 percent lower than end of the second quarter. The upward trend is expected to continue as the lean season sets in.

Fig 5. Nominal Price Trend of Local Rice

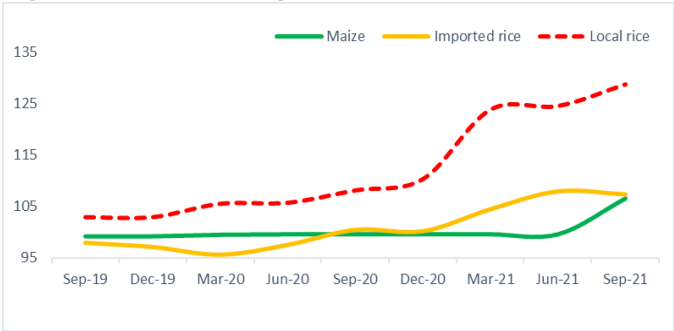


Policy-wise, Government, through NLC intervened in the market by selling imported rice to retailers at subsidised price of US\$ 12.5 per 25kg bag. In addition, the National Directorate for Commercial Regulation (NDCR) continues to do market price inspection as part of the control on basic need's price in accordance with Decree Law on fixing maximum trade margins.

Rice and Maize Consumer Price Indices

The local rice price index (2018=100) notched up further in the third quarter of 2021 reaching 128.8 points, 4.2 percentage points more than the previous quarter. Imported rice index remained relatively subdued over the same period, likely on the back of subsidies and price controls. While maize index shapely increased by 7.0 percentage points during the reference period, the first significant increase in nearly three years.

Fig 6: Maize and rice price indices

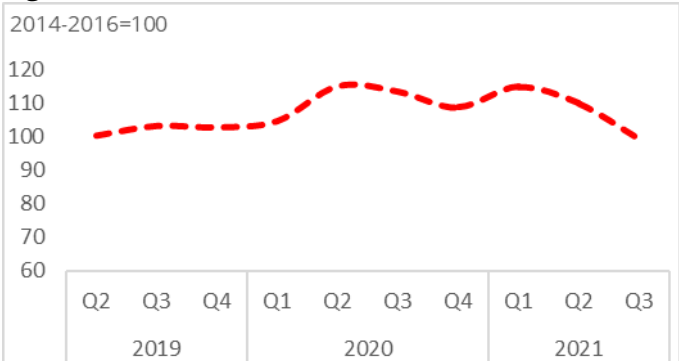


International Rice Prices

Using the FAO All Rice Index as a measure of international rice prices, the Index (2014-2016) reached an all high in February 2021, averaging 116.0 points.

Since then, sharp quarterly drops have been observed with the third quarter value at 99.3 points which is 9.5 percent lower than the previous quarter. However, on monthly basis, an uptick was observed for the September value at 98.7 points which is 0.82 percent higher than the previous month.

Fig 7. FAO ALL Rice Index



Source : <http://www.fao.org/economic/est/publications/rice-publications/the-fao-rice-price-update/en/>

Food Utilization

Nutrition information for the under-five population

Based on the Health Management Information System (HMIS), the number of under-five children that accessed the health facility, including SISCAs activities, increased to 64 percent in the third quarter from 58 percent in the previous period. Relatively high access rates were observed in the municipalities of Viqueque (94%), Manufahi (86%), Ermera (83%) and Covalima (77%).

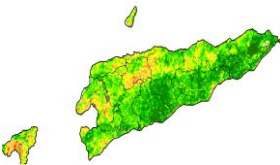
Of those that accessed the health facility, 95 percent had normal weight, 4 percent moderate underweight and 1 percent with severe underweight. No changes were observed compared to the previous period. While in terms of the general population, the Food and Nutrition Survey found that 32.4 percent of the under-five were underweight, 47.1 percent stunted, and 8.6 percent wasted.

Climate and Earth Observation

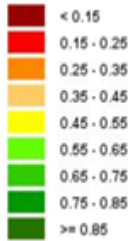
Rainfall Distribution

The rainfall amounts between July and September 2021 ranged from 0 mm to 155mm, with higher intensity as season progressed. As at the end of September, more than 50mm were observed in the southern part of Lautem, Viqueque, Manatuto, Manufahi, Covalima municipalities while Bobonaro received much less amounts.

September



VHI



In July, the level of vegetation was relatively low ranging between 0.25 to 0.65, with some yellow to reddish in parts of Dili, Aileu and Ainaro municipalities. Progressively increased to an index of 0.55 to 0.85 (green) at the end of September. Seasonally, a condition indicative of a start to agriculture agricultural activities.

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