



GIEWS Country Brief The Republic of Indonesia

Reference Date: 05-December-2023

FOOD SECURITY SNAPSHOT

- Drier-than-average weather conditions forecast in coming months
- Cereal production in 2023 forecast slightly below average
- Record cereal import requirements forecast in 2023/24
- Prices of rice higher year-on-year in October

Drier-than-average weather conditions forecast in coming months

Planting of the 2024 main (first) paddy and (rainy season) maize crops, which account for the bulk of annual production, is ongoing at a slow pace due to soil moisture deficits following below-average precipitation amounts and higher-than-average temperatures since October 2023. Remote sensing data, as of mid-November, indicates below-average vegetation conditions (red, orange and yellow colours in VHI map), especially in the key producing Sumatera (southern parts) and Java islands, suggesting unfavourable yield prospects for the early-planted crops. Crops in rainfed areas, covering about 15 percent of paddy sowings and nearly all maize, are expected to be affected by the ongoing dry weather conditions.

Weather forecasts point to a high likelihood of below-average precipitation amounts and elevated temperatures between December 2023 and February 2024, associated with the prevailing El Niño event. If this forecast materializes, production of 2024 main crops as well as irrigation water availability for the 2024 second rice crop may be affected.

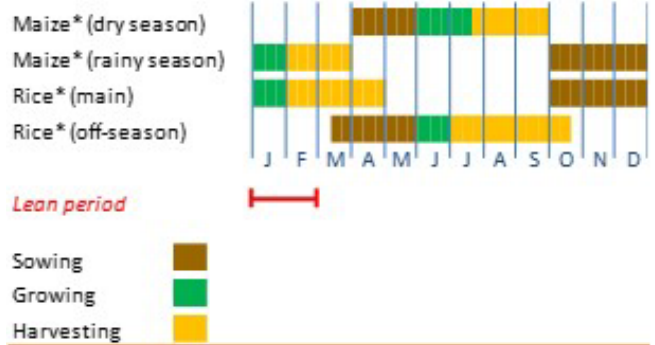
Cereal production in 2023 forecast slightly below average

Harvesting of the 2023 minor (third) paddy crop, which accounts for about 20 percent of the annual output, is underway and will finalize at the end of December. Production is forecast below the five-year average, owing to both reduced sowings primarily on account of scarce precipitation amounts between August and November 2023. The 2023 first and second paddy crops, which account for 55 and 25 percent, respectively, of the annual production, were harvested earlier in the year and were estimated at below-average levels. In aggregate, 2023

Indonesia

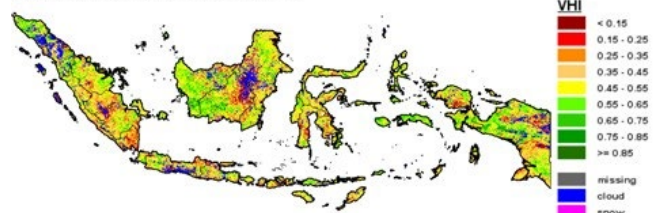
Crop Calendar

(*major foodcrop)



Indonesia - Vegetation Health Index (VHI)

Dekad 2, November 2023



Indonesia

Cereal Production

	2018-2022 average	2022	2023 forecast	change 2023/2022
	000 tonnes			percent
Paddy	55 524	54 750	53 250	-2.7
Maize	21 618	22 000	21 500	-2.3
Total	77 142	76 750	74 750	-2.6

Note: Percentage change calculated from unrounded data.

paddy production is forecast at a below-average level of 53.3 million tonnes.

Production of the 2023 maize crop, harvested last September, is estimated at a near-average level of 21.5 million tonnes as large sowings driven by strong demand by the poultry industry almost entirely offset reduced yields due to dryness.

Record cereal import requirements forecast in 2023/24

Total cereal import requirements in the 2023/24 marketing year (April/March) are forecast at a record level of 14.6 million tonnes, primarily reflecting a strong increase in imports of rice forecast at 3.3 million tonnes, due to substantial purchases by the government, aiming to replenish public stocks and control rising domestic prices. Import requirements of wheat, accounting for the bulk of the country's cereal imports and used for both food and feed, are projected at a near average level of 10.1 million tonnes. Import requirements of maize are forecast at 1.2 million tonnes, slightly above last year's high level, reflecting strong demand by the poultry industry.

Prices of rice higher year-on-year in October

Domestic prices of rice, the country's main staple, gradually increased between August 2022 and March 2023, mostly due to high costs of production and transport, as well as below average production. Since March 2023, the government has implemented several measures to curb the price increases. These measures include large imports of rice through official channels, increased sales of rice at subsidized prices and the free distribution of rice to 21.35 million low-income households. Following improved market availability from the 2023 main harvest, prices of rice stabilized from March to July 2023. However, since last August, prices have resumed their upward trend, as seasonal upward pressure was compounded by expectations of a reduced output of the 2023 third crop and concerns about the ongoing dryness affecting the 2024 crop. Overall, October prices of rice were about 20 percent higher year-on-year.

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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

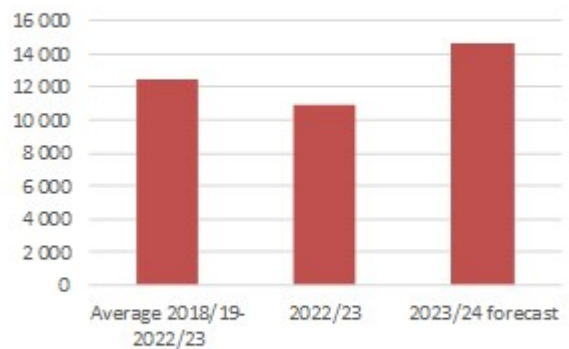
<https://www.fao.org/giews/earthobservation/>

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

Indonesia

Cereals Imports

000 tonnes

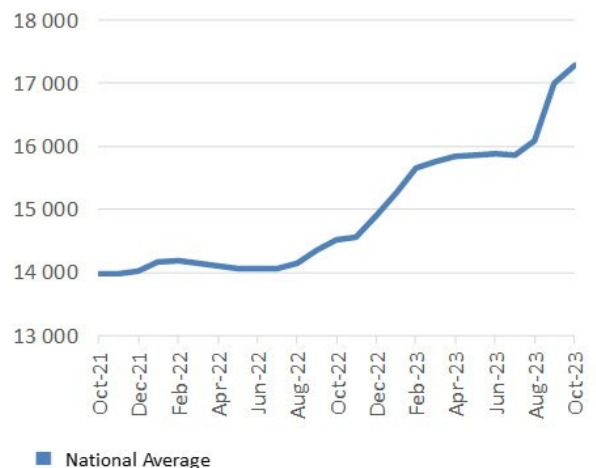


Notes: Includes rice in milled terms. Split years refer to individual crop marketing years (for rice, calendar year of second year shown).

Indonesia

Retail prices of rice

Indonesian rupiah per kg



■ National Average



GIEWS Country Brief Indonesia

Reference Date: 18-October-2022

FOOD SECURITY SNAPSHOT

- Cereal output in 2022 forecast at near-average level
- Cereal import requirements in 2022/23 forecast at near-average level
- Prices of wheat flour at record levels in August

Cereal production in 2022 forecast at near-average level

The 2022 third paddy crop, which accounts for about 20 percent of the total annual output, is growing under favourable weather conditions (green areas in ASI map) and is expected to be harvested from November. The 2022 paddy production, including the already harvested first and second crops, is officially forecast at 55.7 million tonnes, up 2.3 percent from 2021 due to area expansions and favourable yield prospects.

The harvest of the 2022 maize crop finalized last September and the production is estimated at a record level of 23 million tonnes. The bumper output reflects above-average sowings owing to high demand by the poultry industry and favourable weather conditions that, with the use of high-yielding seed varieties, resulted in slightly above-average yields.

Cereal import requirements in 2022/23 forecast at near-average level

Total cereal import requirements in the 2022/23 marketing year (April/March) are forecast at a near-average level of 12.9 million tonnes. Import requirements of wheat, accounting for the bulk of the country's cereal imports and used for both food and feed, are projected at an average level of 11.1 million tonnes. For maize, import requirements are forecast at 1.1 million tonnes, slightly above last year's high level, reflecting the high demand by the poultry industry.

Prices of wheat flour at record levels in August

Domestic prices of wheat flour have increased by 18 percent since November 2021 and were at high levels in August 2022, mostly driven by elevated international export quotations. Domestic prices of rice declined during the first half of 2022 following the main harvest but increased seasonally in July and August. Overall, in August, rice prices were close to their year-earlier levels.

Indonesia

Crop Calendar

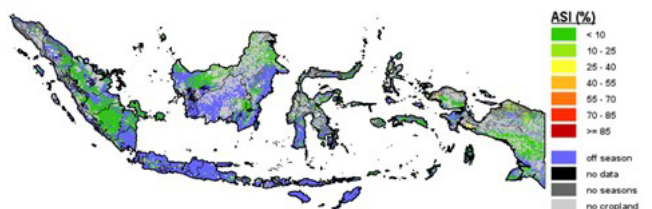
(*major foodcrop)



Source: FAO/GIEWS.

Indonesia - Agricultural Stress Index (ASI)

from start of season 1 to dekad 3, September 2022



Source: FAO/GIEWS Earth Observation System.

Indonesia

Cereal Production

	2017-2021 average	2021	2022 forecast	change 2022/2021
	000 tonnes			percent
Rice (paddy)	56 460	54 415	55 670	2.3
Maize	21 988	22 700	23 000	1.3
Total	78 448	77 115	78 670	2.0

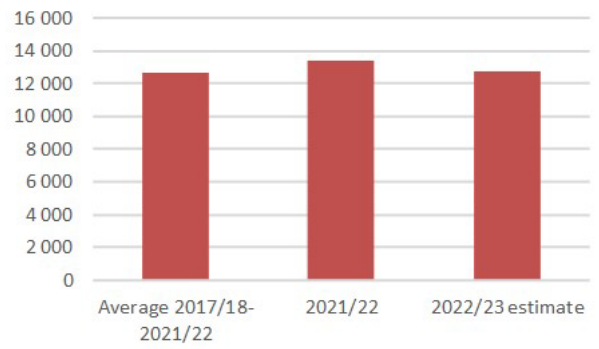
Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Indonesia

Cereals Imports

000 tonnes



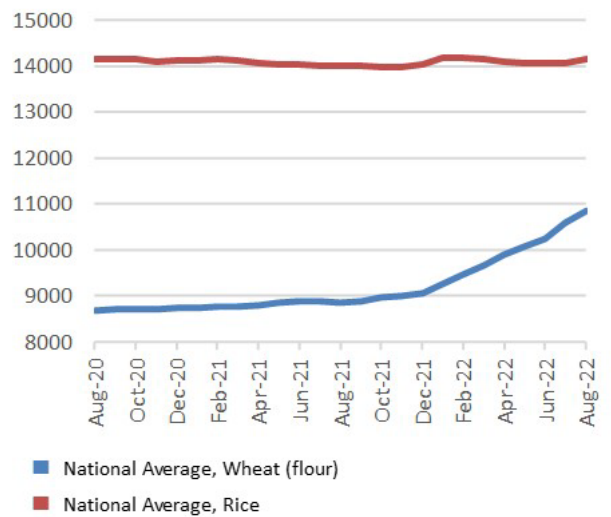
Notes: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Indonesia

Retail prices of rice and wheat flour

Indonesian rupiah per kg



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Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Indonesia

Reference Date: 25-March-2021

FOOD SECURITY SNAPSHOT

- Favourable production prospects for 2021 main paddy and maize crops
- Below-average paddy output obtained in 2020
- Cereal imports in 2020/21 forecast below five-year average
- Prices of rice increased between January and April 2020, and decreased since then

Favourable production prospects for 2021 main paddy and maize crops

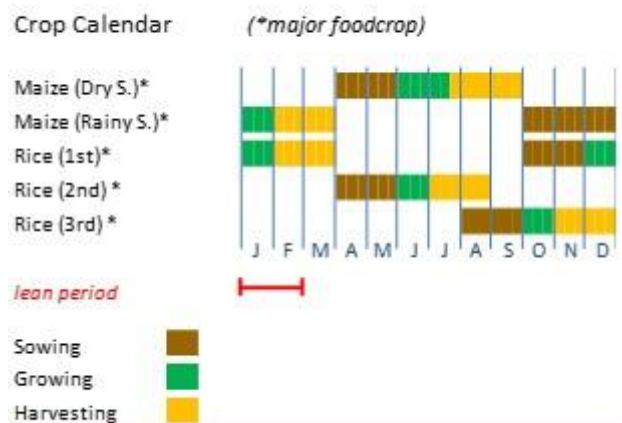
Harvesting of the 2021 main (first) paddy crop, accounting for about 55 percent of the annual production, is ongoing and will conclude in June. The November-March monsoon season was characterized by a timely onset and average to above-average precipitation amounts in most parts of the country. The favourable rainy season supported planting operations and benefitted crop development especially in most main producing areas of Java and Sulawesi islands. The area harvested from January to April 2021 is officially forecast at 4.9 million hectares up 27 percent from January-April 2020, aided by incentives by the Government to support paddy production, including distribution of subsidized seeds and fertilizers. As of late February, remote sensing data indicates satisfactory vegetation conditions in most of the country (see ASI map), inferring generally favourable yield prospects for the paddy crop. Crop conditions in parts of South Sumatra and Lampung Province and in northern areas of West Java Province are below average due to dry weather in November-December 2020. Localized crop damages in South Kalimantan were caused by floods due to heavy rains last January. The 2021 mostly irrigated second crop, accounting for about 30 percent of the annual production, will be planted from April. Irrigation water availabilities are reported to be adequate.

Harvesting of the 2021 main maize crop will be completed in March and production prospects are favourable. The area planted is estimated to be close to last year's above-average level, while favourable weather conditions benefitted yields. The 2021 off-season maize crop, for harvest from July, will be planted in April/May.

Below-average paddy output obtained in 2020

The 2020 paddy output is officially estimated at 55.2 million tonnes, only slightly above the 2019 reduced level as the main

Indonesia



Source: FAO/GIEWS.

Indonesia - Agricultural Stress Index (ASI)

from start of season 1 to dekad 3, February 2021



Source: FAO/GIEWS Earth Observation System.

Indonesia

Cereal Production

	2015-2019 average	2019	2020 estimate	change 2020/2019
	000 tonnes			percent
Rice (paddy)	58 731	54 604	55 160	1.0
Maize	20 945	22 586	22 500	-0.4
Total	79 676	77 190	77 660	0.6

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

(first) paddy crop was affected by dry weather conditions. Maize output is estimated at an above-average level of 22.5 million tonnes due to high plantings sustained by strong local demand.

Cereal import requirements in 2020/21 forecast below five-year average

The country is one of the largest importers of cereals in Southeast Asia. Total cereal import requirements in the 2020/21 marketing year (April/March) are estimated at 12 million tonnes, 7 percent below the five-year average.

Import requirements of wheat, which is not produced in the country and is used for both food and feed, are estimated at an average of 10.5 million tonnes. Imports of rice in the 2021 calendar year are forecast at 400 000 tonnes close to the limited volumes imported in 2019 and 2020. For maize, import requirements are estimated at 1 million tonnes, almost 20 percent below the average levels, mostly reflecting a decrease in demand from the feed industry due to lower poultry meat consumption as a result of the COVID-19 pandemic.

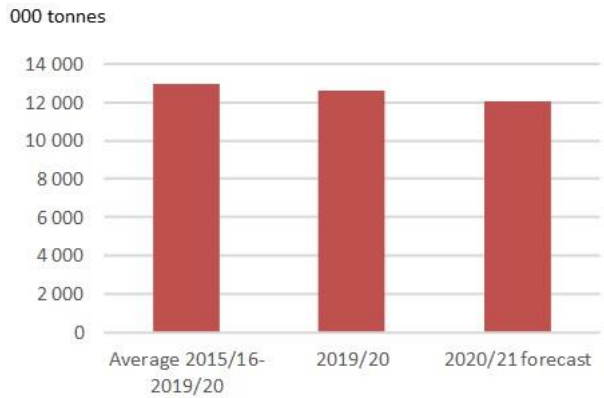
Prices of rice increased between January and April 2020, but softened since then

Prices of rice increased between September 2019 and April 2020, reflecting expectations of a reduced output of the 2020 main season crop followed by strong domestic demand and supply disruptions related to the COVID-19 pandemic at the beginning of last year. Subsequently, prices decreased weighed by the arrival of the 2020 harvest into the markets and the increased distribution of subsidized rice to the families hardest affected by the COVID-19 pandemic. Overall, prices of rice in January 2021 were close to their year-earlier levels.

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Indonesia

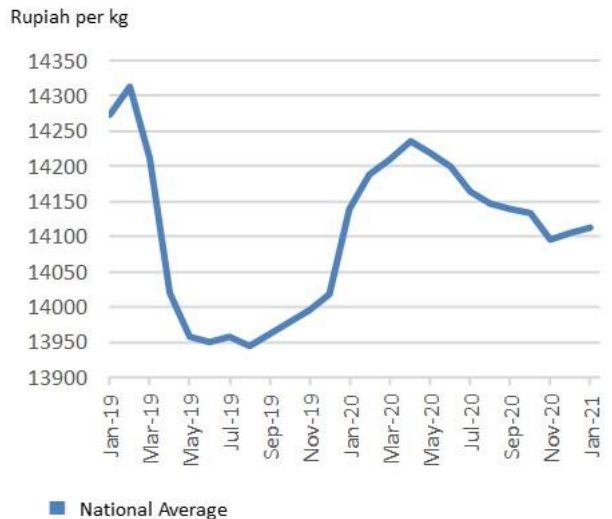
Cereals Imports



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.

Indonesia

Retail prices of rice



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Indonesia

Reference Date: 24-July-2020

FOOD SECURITY SNAPSHOT

- First main season 2020 paddy rice production estimated at below-average level due to rainfall deficits
- Cereal imports requirements in 2020/21 anticipated slightly above-average
- Prices of rice increased between January and April 2020, but softened in May-June

First main season 2020 paddy rice production estimated at below-average level due to rainfall deficits

Harvesting of the 2020 first (main) paddy crop was delayed by about two months in some areas as the cropping cycle started late due to below-average rains between October and December 2019 that affected planting operations. Rains improved in January 2020, bringing some relief to the areas affected by dry weather conditions and allowed planting operations to progress. However, the area planted is estimated at a below-average level. In addition, the dry weather conditions at the start of the season also affected yields. As a result, the output of the 2020 main season paddy is estimated below the previous five-year average.

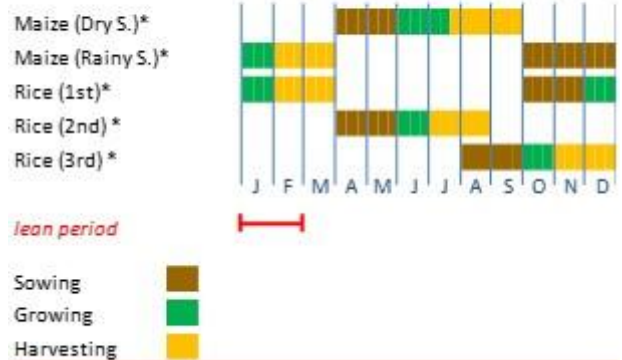
Planting of the 2020 second paddy crop started with delays due to the late harvest of the main season crop. Overall, production prospects are favourable as precipitations have been near-average since May 2020 and seasonal weather forecasts point to average to above-average rains across the main producing areas for the July-September 2020 period. This is expected to improve water availabilities for irrigation in the main reservoirs and boost soil moisture reserves in the rainfed areas. Planting operations of the 2020 third paddy crop normally begin in August.

Harvesting of the 2020 main maize crop is about to conclude. Early rainfall deficits caused delays in planting operations. Near-average rains from January 2020 allowed planting to progress and benefitted yields. Farmers have reported increased Fall Armyworm infestations in parts of the main producing areas of Java and Sumatera, which resulted in localized reductions of yields. The 2020 off-season maize crop is growing under generally favourable weather conditions. Overall, the output of

Indonesia

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Indonesia

Cereal Production

	2015-2019 average	2019	2020 forecast	change 2020/2019
	000 tonnes			percent
Rice (paddy)	58 731	54 604	54 000	-1.1
Maize	23 259	26 300	26 500	0.8
Total	81 991	80 904	80 500	-0.5

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

maize is forecast at an above-average level, reflecting high plantings driven by the steady demand of the feed industry.

Cereal import requirements in 2020/21 anticipated slightly above-average

The country is one of the largest importers of cereals in Southeast Asia. Total cereal import requirements in the 2020/21 marketing year (April/March) are estimated at 13.4 million tonnes, slightly above the five-year average.

Import requirements of wheat, which is not produced in the country, are estimated at 11.1 million tonnes in the 2020/21 marketing year (April/March), about 6 percent above the five-year average, on account of sustained demand for food and feed use. Imports of rice in the 2020 calendar year are forecast at 1.4 million tonnes, 960 000 tonnes above the 2019 level. For maize, import requirements in 2020 are estimated at 900 000 tonnes, close to the five-year average.

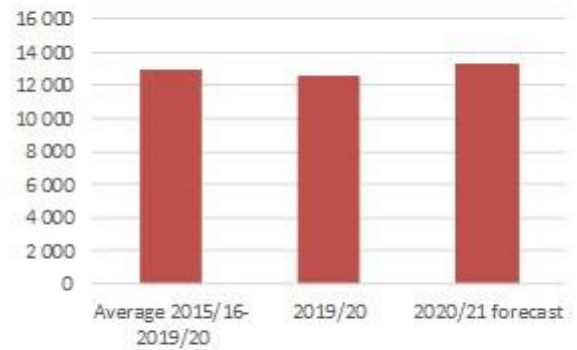
Prices of rice increased between January and April 2020, but softened in May-June

Prices of rice increased between January and April 2020, reflecting harvest delays and expectations of a reduced output of the 2020 main season crop. Strong domestic demand and supply disruptions related to the COVID-19 pandemic also added to the upward pressure. Subsequently, prices of rice showed signs of softening in May and June 2020, weighed by the arrival into the markets of the main season harvest. Overall, prices of rice in June 2020 were close to their year-earlier levels. In an effort to stabilize domestic prices of rice amid the COVID-19 pandemic, the State food procurement agency BULOG, decided to increase the selling of rice into the local markets.

Indonesia

Cereals Imports

000 tonnes



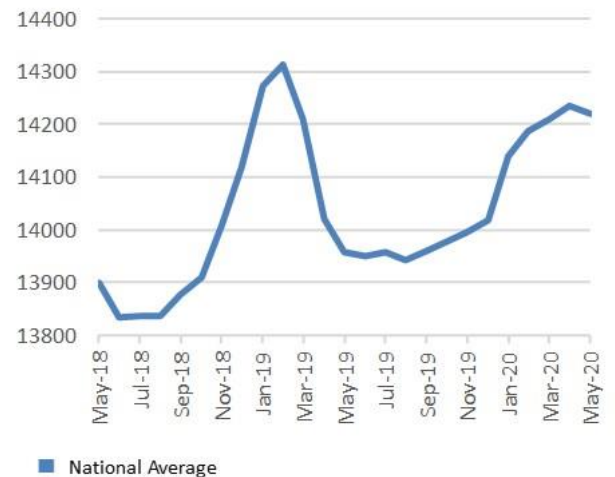
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Indonesia

Retail prices of rice

Rupiah per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

COVID-19 and measures adopted by the Government

In an attempt to contain the spread of the COVID-19 pandemic, the Government adopted various measures, including temporary bans on domestic and international travel, closure of educational institutions and restrictions on public events. Generally, economic activities deemed non-essential were restricted, but productive and commercial activities along the food supply chain were allowed to operate. In early June 2020, the Government issued the “new normal” guidelines, for a gradual easing, by phases, of all restrictive measures.

As of May 2020, the Government has allocated a total of IDR 405 trillion (USD 27.8 billion) for COVID-19 responses. The budget allocated to support the health sector amounted to IDR 75 trillion (USD 5.2 billion), social safety nets amounted to IDR 110 trillion (USD 7.6 billion), tax incentives and stimulus for the industry totaled IDR 70 trillion (USD 4.8 billion) and IDR 150 trillion (USD 10.3 billion) were allocated to support economic development.

To support the most vulnerable households, the Government allocated of IDR 110 trillion (USD 7.6 billion) to the existing safety net programmes, including the Staple Food Card, the Family Hope Programme (PKH), the pre-employment card, village level direct assistance and the President’s social assistance. These programmes assist about 70 million poor people through the distribution of free staple food and cash transfers.

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GIEWS Country Brief Indonesia

Reference Date: 14-August-2019

FOOD SECURITY SNAPSHOT

- Paddy production from 2019 second season is forecast at average level
- Cereal imports in 2019/20 marketing year are forecast at a level close to average
- Prices of rice declined moderately, while prices of wheat flour levelled off

Paddy production from 2019 second season is forecast at an average level

The 2019 first (main) season paddy output, which accounts for about 45 percent of the total output, was harvested by April and production was estimated at a level close to the average.

Harvesting of the 2019 secondary paddy crop, which accounts for about 35 percent of the annual output, is underway. The season started with some delays, due to the below-average rainfall between March and April, which hampered planting operations in parts of Java, Sumatera and Sulawesi. The average to above-average precipitation in May alleviated the moisture deficits, allowing plantings to take place and benefitting an early crop development. During June and July, which marks the onset of the dry season, localized parts of the southern Sumatera, west and central Kalimantan and Java have reported a well below-average rainfall and higher-than-normal temperatures. Official reports, as of early August, indicate that in Java, which produces the bulk of the secondary season output, irrigation water availability in the main reservoirs was adequate. This is expected to limit the impact of the dry weather on crop development. As of late July, remote sensing data indicated satisfactory vegetation conditions in most of the country (see ASI map), inferring generally favourable yield prospects for the paddy crop.

In August, farmers began planting the 2019 third season paddy crop, which accounts for about 20 percent of the total annual output. The harvest will take place towards the end of the year.

Harvesting of the 2019 off-season maize crop recently started, while the 2019 main maize crop was harvested in March. Overall, weather conditions since October 2018 until May 2019 benefitted planting and overall growth of the main and off-season maize crops. Outbreaks of Fall Armyworm in maize producing areas, including parts of Sumatera, Java and Kalimantan provinces coupled with the ongoing dry weather conditions, could negatively affect yields in localized parts of the country. Overall,

Indonesia

Crop Calendar

(*major foodcrop)



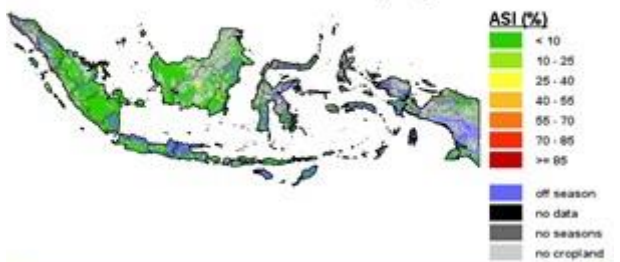
lean period

Sowing
Growing
Harvesting

Source: FAO/GIEWS.

Indonesia - Agricultural Stress Index (ASI)

From start of season 1 to dekad 3, July 2019



Source: FAO/GIEWS Earth Observation System.

the 2019 aggregate maize output is expected to remain close to the previous year's above-average level, reflecting an expansion in the planted area for both the main and off-season crops, driven by strong demand from feed industry.

Cereal imports in 2019/20 marketing year forecast at average level

The country is one of the largest importers of cereals in Southeast Asia. Total cereal import requirements, mainly wheat, in the 2019/20 marketing year (April/March) are forecast at 12.9 million tonnes, close to the five-year average and about 10 percent below the previous year's record high.

Regarding wheat, which is not produced in the country, import requirements are forecast at 11.2 million tonnes, close to the previous year's high level and 14 percent above the five-year average, on account of sustained demand for food and feed use. Rice imports in the 2019 calendar year are forecast at 850 000 tonnes, well below the five-year average and the previous year's high level, on account of adequate domestic supplies from the 2018 bumper output. In 2018, the imported quantity of rice reached a well above-average level, due to significant purchases by the Government, with the aim to replenish the low public inventories and contain rising domestic prices. For maize, import requirements are estimated at 750 000 tonnes, well below the five-year average, mostly reflecting domestic ample supplies following two consecutive bumper harvests in 2017 and 2018.

Prices of rice declined seasonally, while prices of wheat flour levelled off

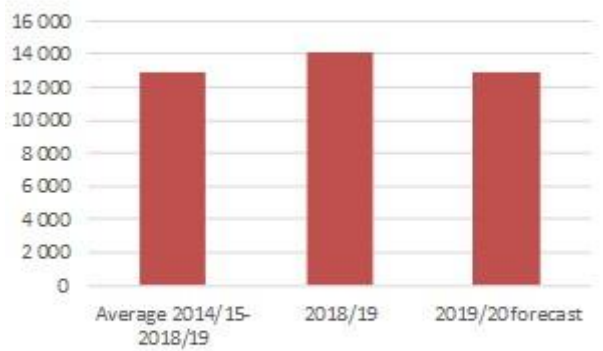
Prices of rice increased moderately in January and February 2019, in line with seasonal trends, and declined between March and June due to the improved availabilities from the main season harvest. Overall, prices of rice in June 2019 were close to the levels of the previous year.

Prices of wheat flour have followed a mild upward trend, increasing by only 3 percent between September 2018 and April 2019. They levelled off in the subsequent two months and in June were slightly higher on a yearly basis, as adequate imports of wheat grain limited stronger price increases.

Indonesia

Cereals Imports

000 tonnes



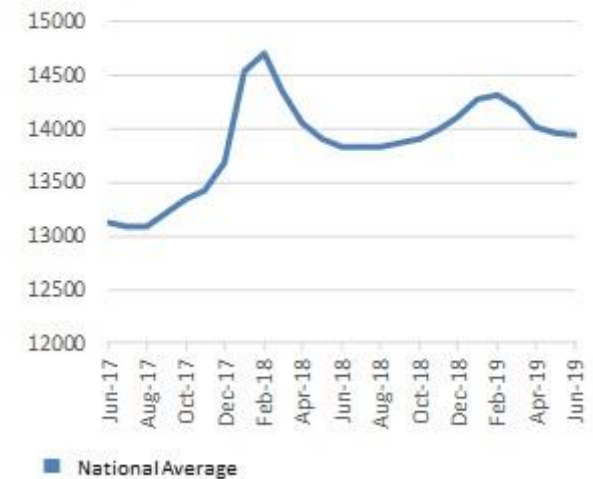
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Indonesia

Retail prices of rice

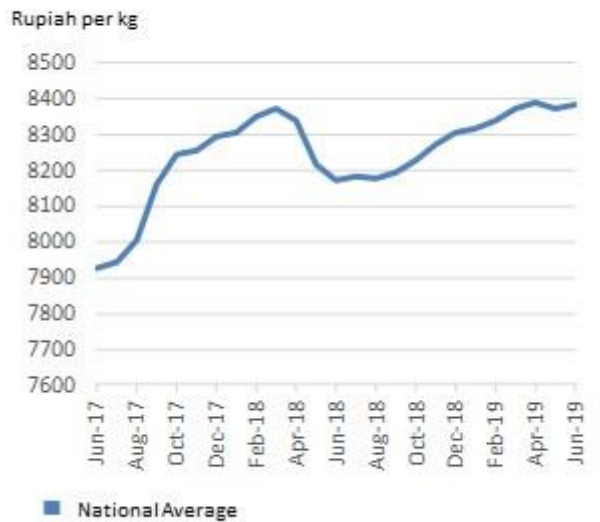
Rupiah per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

Indonesia

Retail prices of wheat flour



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

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GIEWS Country Brief Indonesia

Reference Date: 13-February-2019

FOOD SECURITY SNAPSHOT

- Favourable prospects for 2019 main crops
- Total cereal import requirements in 2018/19 forecast at record levels
- Prices of rice increased moderately, while prices of wheat flour levelled off in January

Favourable prospects for 2019 main crops

Harvesting of the 2019, mostly irrigated, main paddy crop started in early February and will be completed by the end of April. Precipitation since the start of the cropping season in October 2018 has been well distributed in most parts of the country benefiting early crop development. Remote sensing data indicate favourable crop conditions across the country, with the exception of some parts of the Jawa Barat (West Java) Province, where about 20 percent of the paddy production is concentrated (see ASI map). Here, erratic rainfall and below-average irrigation water availabilities were reported between October and December 2018, affecting plantings and crop development. Overall, production prospects for the 2019 main paddy crop are currently favourable.

Harvesting of the 2019 main maize crop has just started and is expected to be completed by March. Production prospects are currently favourable as good crop conditions and adequate rainfall distribution have been registered since the start of the cropping season in the main producing areas Jawa Timur (East Java), Jawa Tengah (Central Java) and Sumatera.

Total cereal import requirements in 2018/19 (April/March) forecast at record levels

The country is one of the largest importers of cereals in Southeast Asia. Total cereal import requirements in the 2018/19 marketing year (April/March) are forecast at a record of 13.1 million tonnes, about 7 percent above the five-year average. Wheat import requirements in the 2018/19 marketing year (April/March) are forecast at 10.2 million tonnes, 13 percent above the five-year average, reflecting sustained demand for human consumption and feed use. Rice imports in 2018/19 are forecast at 2.2 million tonnes, well above the five-year average, following significant purchases on the regional markets by the Government, with the aim to replenish public inventories and control increasing domestic prices that reached all-time high values in February 2018. By contrast, maize import requirements in 2018 are estimated at a low 600 000 tonnes, about 70 percent

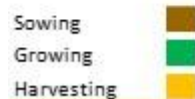
Indonesia

Crop Calendar

(*major foodcrop)



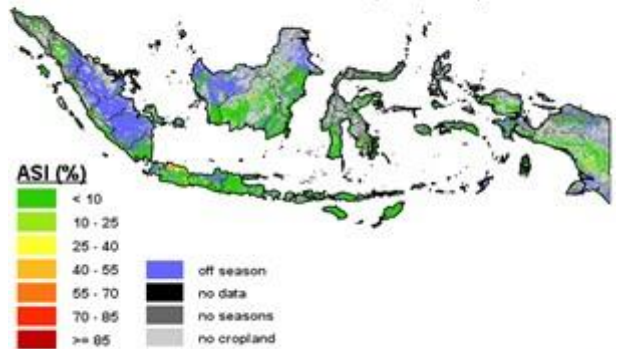
lean period



Source: FAO/GIEWS.

Indonesia - Agricultural Stress Index (ASI)

from start of season 1 to dekad 1, February 2019



Source: FAO/GIEWS Earth Observation System.

below the five-year average, reflecting ample market supplies from the 2018 bumper output and large carryover stocks.

Prices of rice increased moderately, while prices of wheat flour levelled off in January

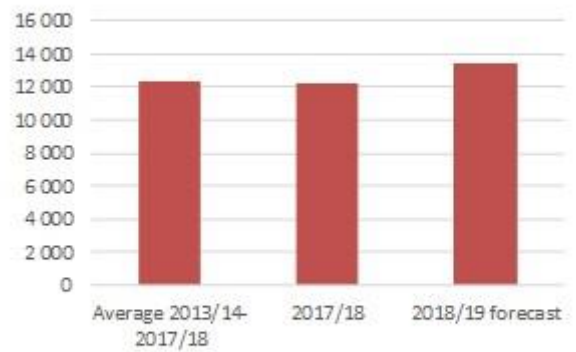
Prices of rice increased moderately in the past months in line with seasonal trends and were slightly below their year-earlier values in January.

Similarly, prices of wheat flour levelled off in January after moderate increases in the last quarter of 2018 and were close to their year-earlier values in January.

Indonesia

Cereals Imports

000 tonnes



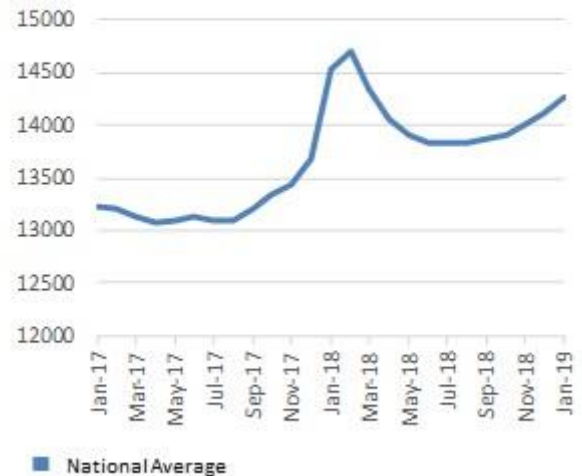
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Indonesia

Retail prices of rice

Rupiah per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

Indonesia

Retail prices of wheat flour



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

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GIIEWS Country Brief Indonesia

Reference Date: 13-July-2018

FOOD SECURITY SNAPSHOT

- Favourable production prospects for 2018 cereal crops
- Total cereal imports in 2018/19 forecast to surpass previous year's high level
- Prices of rice declined for second consecutive month in April

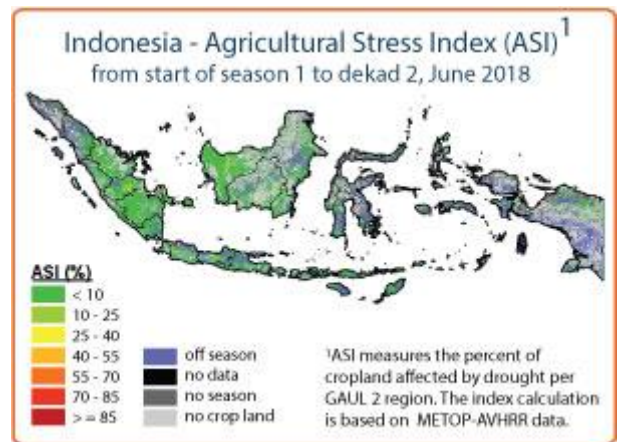
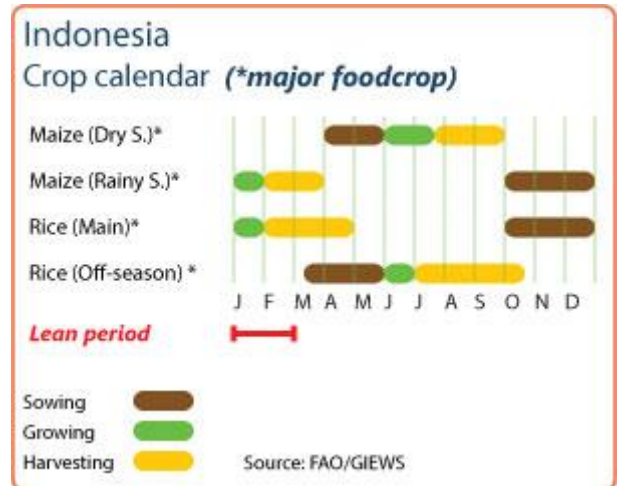
Favourable production prospects for 2018 cereal crops

Harvesting of the 2018, mostly irrigated, main paddy crop is complete. Overall, rainfall amounts and water availability for irrigation were reported to be adequate throughout most of the country, benefitting overall yields. However, below-average rains between January and April 2018 over West and North Sumatra provinces negatively affected rainfed paddy crops at the reproductive and ripening stages, reducing yields. Regarding the 2018 secondary paddy crop, the bulk was planted between May and June, under near normal rainfall and adequate supplies of water for irrigation, which had a positive impact on crop establishment and development. Currently, remote sensing data indicates good vegetation conditions across all cropping areas (see ASI map). Some concerns, however, remain for the provinces of Central and East Java as well as North and West Sumatra due to persistent below-average rains since early March. Based on the estimates of the already harvested main crops and the early outlook for the ongoing secondary crop, the aggregate paddy production in 2018 is forecast at 74.5 million tonnes, similar to the 2017 bumper level and about 7 percent above the five-year average.

Harvesting of the 2018 main maize crop was completed in March, while the secondary crop, which benefitted from generally favourable weather conditions, will be harvested from the end of July. The 2018 aggregate maize output is forecast at about 24.5 million tonnes, close to the previous year's record level and well above the five-year average as area planted increased year-on-year, supported by a strong demand from the feed industry.

Total cereal imports in 2018/19 forecast to surpass previous year's high level

The country is one of the biggest importers of cereals in Southeast Asia. Total cereal imports in the 2018/19 marketing year are forecast at 14.3 million tonnes, 8 percent above the



Indonesia Cereal production

	2013-2017 average	2017	2018 forecast	change 2018/2017
	000 tonnes		percent	
Rice (paddy)	72 309	73 870	74 500	1
Maize	20 364	24 320	24 500	1
Others	0	0	0	0
Total	92 674	98 190	99 000	1

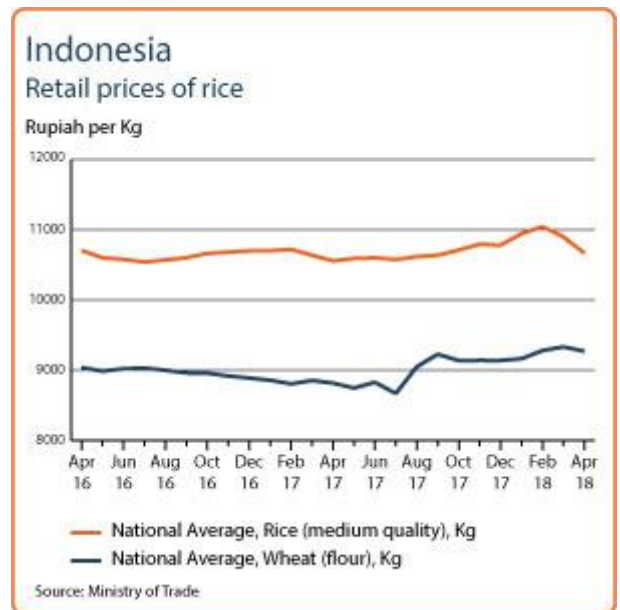
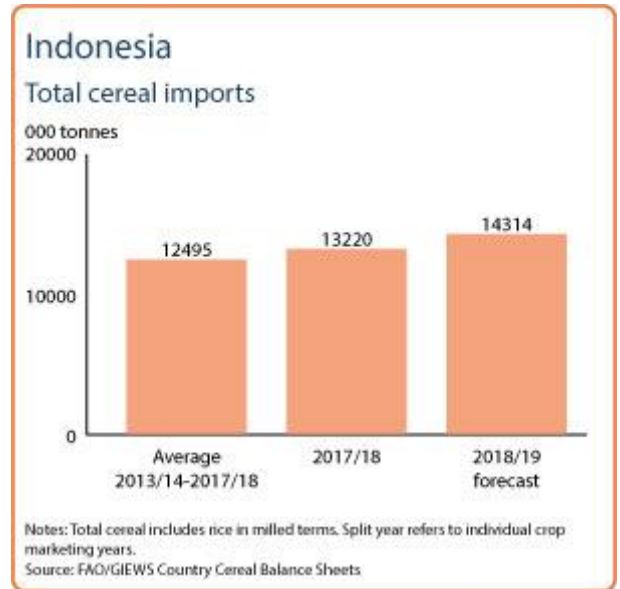
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

previous year's high level and 15 percent above the average. Rice imports in 2018 are anticipated to reach 1.5 million tonnes, up from the eight-year low levels of 320 000 tonnes in 2017, supported by Governmental purchases in response to increasing domestic prices between October 2017 and February 2018, and the reduction in State rice inventories. Wheat imports are projected at 11.5 million tonnes, close to last year's record level due to continued strong domestic demand for human consumption and for poultry and livestock feed. Maize imports in the 2018/19 marketing year are forecast at 1.2 million tonnes, close to the level of the previous year.

Prices of rice declined for second consecutive month in April

The average price of medium quality rice, following slight increases earlier in the year, declined for the second consecutive month in April, reflecting improved market availabilities from the 2018 main harvest and imports. Overall, prices of rice in April 2018 were close to their year-earlier levels. Prices of wheat flour were generally stable owing to adequate imports in recent months.

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GIEWS Country Brief Indonesia

Reference Date: 05-June-2017

FOOD SECURITY SNAPSHOT

- **Aggregate rice production in 2017 forecast to increase from last year's good level**
- **Total cereal imports in 2017/18 forecast to decrease slightly from last year's average level**
- **Rice prices declining since March 2017 and close to their year-earlier levels**

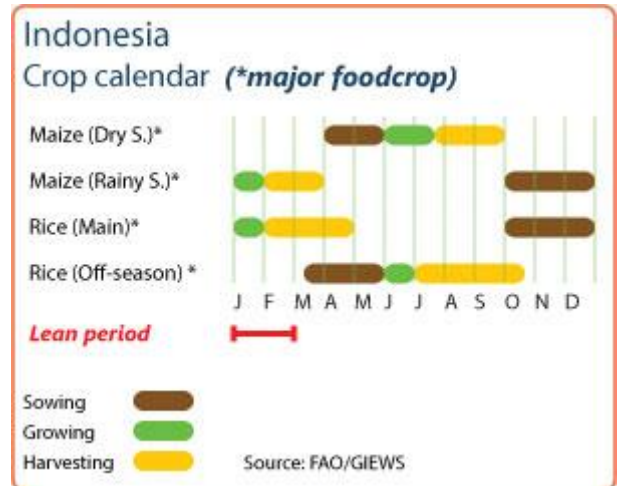
Aggregate rice production in 2017 forecast to increase from last year's good level

Harvesting of the 2017, mostly irrigated, main rainy season paddy crop is nearing completion, with the bulk already harvested between February and April. Abundant precipitation, coupled with adequate water supply for irrigation, benefitted planting operations and overall yields. Diverse initiatives have been launched by the Government to support rice production, including the rehabilitation of irrigation channels. However, heavy rains at the beginning of the year triggered localized flooding and landslides in parts of the country, including important paddy-producing areas such as West and Central Java and parts of western Sumatra. Despite some concerns over the quality of the affected crops, the overall effect on national rice production is expected to be minimal. Based on FAO's estimates for the already harvested main crops and assuming favourable weather conditions during the ongoing 2017 off-season, FAO tentatively forecasts the 2017 aggregate paddy production at 74.2 million tonnes, 2 percent above last year's good level.

Harvesting of the 2017 main season maize crop was completed in March and sowing of the secondary crops is about to start. FAO forecasts the 2017 aggregate maize output at 21 million tonnes, 7 percent above last year's bumper level. The projected increase is the result of an expansion in plantings in response to strong demand from the domestic feed industry.

Total cereal imports in 2017/18 forecast to decrease slightly from last year's normal level

The country is one of the biggest importers of cereals in South-East Asia. Total cereal imports in the 2017/18 marketing year are forecast at 11.7 million tonnes, slightly below last year's normal level. The small decrease reflects anticipated reduced rice imports in calendar year 2017, which are foreseen to fall by 33 percent to 800 000 tonnes (milled basis), consistent with the



Indonesia
Cereal production

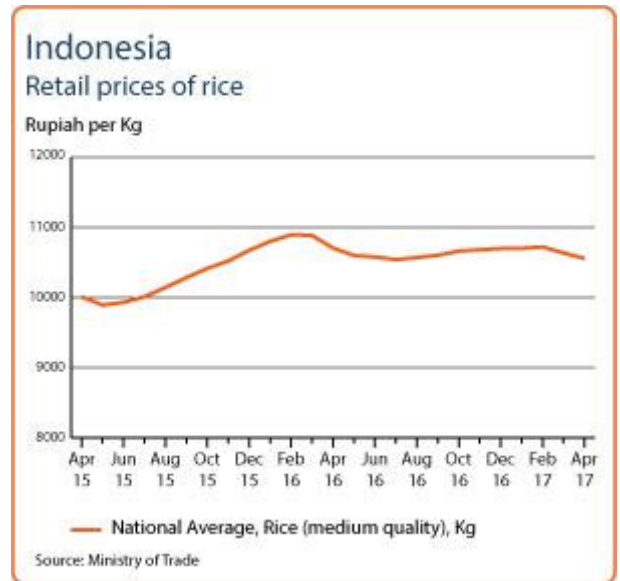
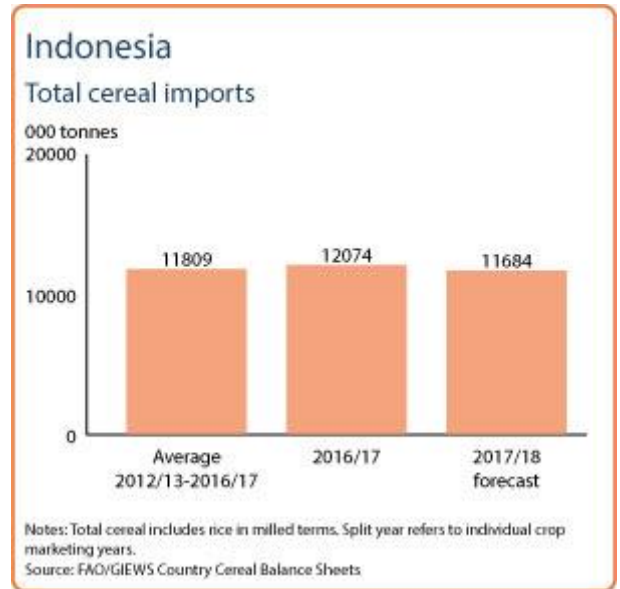
	2012-2016 average	2016	2017 forecast	change 2017/2016
	000 tonnes			percent
Rice (paddy)	71,372	72,680	74,200	2
Maize	19,244	19,700	21,000	7
Others	0	0	0	0
Total	90,616	92,380	95,200	3

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

prospects of a larger 2017 crop. By contrast, strong domestic demand is seen to increase slightly wheat imports to a record level of 9.8 million tonnes in 2017/18.

Rice prices declining since March 2017

The average price of medium quality rice, the main staple in the country, have been decreasing since last March, with improved supplies from the 2017 main season harvest. Overall, rice prices in April were close to their year-earlier levels.



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Reference Date: 27-May-2016

FOOD SECURITY SNAPSHOT

- Cereal production in 2016 forecast to decline slightly
- Total cereal imports in 2016/17 marketing year forecast to increase to record level
- Rice prices declining but still at relatively high level
- Concerns remain for vulnerable rural groups due to high prices and negative impact of dry weather on food production and incomes

Cereal production in 2016 forecast to decline slightly

Harvesting of the 2016, mostly irrigated, main season paddy crop is ongoing with a delay of up to eight weeks in several areas. The late onset of the rainy season and erratic precipitation through January, under the influence of the El Niño event, delayed planting activities, particularly in the rainfed perimetres. The areas that recorded the highest delays include parts of West and East Java, West Nusa Tenggara and South Sulawesi, which together account for the bulk of main season rice output. Although improved precipitation since February allowed planting pace to pick up, average yields for the season are expected to be reduced because of the dry conditions for the early-planted crops. Based on these latest prospects for the main season and the assumption that the off-season crop will be increased in partial compensation, FAO tentatively forecasts the 2016 aggregate rice production at 71.9 million tonnes, 2 percent below last year's level.

Harvesting of the 2016 main season maize crop is nearing completion and sowing of the secondary season crop is expected to start in June and continue into August. The 2016 aggregate maize output is forecast to decline slightly from last year's good level due to the dry weather conditions.

Recent climate forecasts indicate that the gradually weakening El Niño event will transit to neutral conditions by mid-year. From then on, there is an increased probability of a La Niña episode occurring during mid/late 2016, with about a 75 percent chance of a La Niña event during September 2016 to February 2017, although much uncertainty exists regarding this possible transition. Historically, La Niña is associated with increased rainfall in Indonesia, which could result in widespread flooding. This may expose the late-planted 2016 secondary season crops to flooding negatively impacting on yields.

Total cereal imports in 2016/17 marketing year forecast to reach record levels

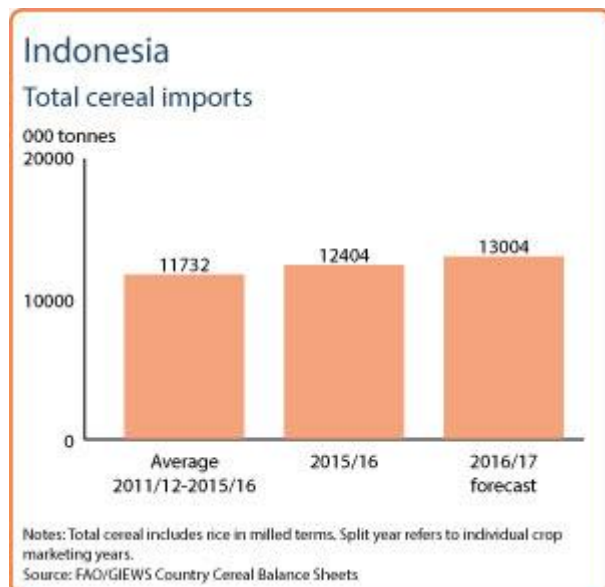
Indonesia is one of the biggest importers of cereals in South East Asia. Total cereal imports in the 2016/17 marketing year are forecast at 13 million tonnes, some 5 percent above the already record volume of the previous year.



Indonesia Cereal production

	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Rice (paddy)	69 988	73 000	71 900	-2
Maize	18 790	19 400	19 000	-2
Others	0	0	0	0
Total	88 778	92 400	90 900	-2

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

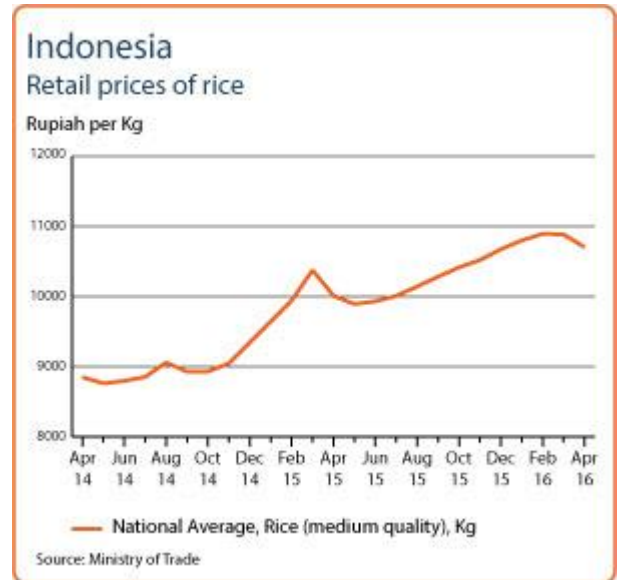


Rice prices declining but still at relatively high levels

The average price of medium-quality rice, the main staple in the country, has decreased slightly since March, with the arrival of the 2016 main season harvest. However, rice prices remain above their levels of a year earlier, after steep increases during the second part of 2015 due to reduced supplies from the 2015 secondary season crop, compounded by concerns over the impact of dry weather on the 2016 main season harvest.

Concerns remain for vulnerable rural groups

Although at national level the decrease in 2016 main season rice and maize outputs is estimated to be small, significant localized production losses are expected particularly in eastern parts of the country, with high concentrations of highly vulnerable subsistence farming families with little resilience. According to official estimates, the severe drought affected around 3 million people, mostly concentrated in eastern parts of the country. Among these populations, some 1.2 million people mostly living in provinces of East Nusa Tenggara, East Java and Papua may face food shortages in the coming months and require relief assistance. High prices of main staple rice are expected to weigh heavily on food access and further stress the food security situation of the most vulnerable populations.



Reference Date: 13-November-2015

FOOD SECURITY SNAPSHOT

- **Widespread dry weather delays planting of 2016 main season crops**
- **Downward revision of 2015 aggregate rice and maize production due to prolonged dry weather**
- **Cereal imports in 2015/16 marketing year (April/March) forecast to decrease from last year's record level**
- **Rice prices at record levels in October, reflecting reduced stock levels and lower 2015 off-season harvests**
- **Concerns remain for vulnerable rural groups due to high prices and negative impact of dry weather on food production**

Dry weather delays planting of 2016 main season crops in key producing areas

Planting of the **2016**, mostly irrigated, main season paddy crop, which accounts for the bulk of annual production, usually starts with the onset of seasonal rains in early October and continues until December. However, following below-average rainfall during October this year over large parts of the country, plantings have been delayed. Furthermore, yields of the early-planted crops are expected to be negatively affected, particularly in the rainfed areas. Most-affected provinces include West Java, East Java, Central Java, North and South Sulawesi and Lampung, which, together, normally account for close to two-thirds of the country's annual rice production. The final outcome of the 2016 rice harvest will largely depend on the availability of water supplies for irrigation for the current main and forthcoming off-season, as approximately 85 percent of total rice area is irrigated. There are also concerns about planting of the 2016 main season maize crop, which has just started and normally continues into December. Seasonal rains could be delayed by four to eight weeks in most parts of the country. The Government has put in place measures to mitigate the impact of the current dry weather, through the rehabilitation of irrigation channels, building of new reservoirs and wells and distribution of water pumps to affected farmers. More rains are urgently needed in the coming weeks to avoid significant 2016 main season production declines in the rainfed areas.

Aggregate rice and maize production in 2015 revised down due to prolonged dry weather

Harvesting of the 2015 off-season rice crop will continue until December, with the bulk already gathered between July and mid-October. Prolonged dry weather between May and September across southern and eastern parts of the country delayed planting operations and caused yield reductions particularly in the rainfed areas. As a result, FAO lowered its forecast for the 2015 aggregate rice production by 2.6 million tonnes, to 73 million tonnes (in paddy terms). Pending more detailed information on the full extent of the damage to the 2015 off-season crop, FAO's current forecast still implies a 3 percent expansion from the 2014 slightly reduced level, mainly due to the record 2015 main harvest, gathered earlier in the year.



Harvesting of the 2015 maize crop was completed in October. Similarly to rice, the estimate of the 2015 aggregate maize output has been lowered from earlier expectations by 1.2 million tonnes to 19.5 million tonnes, following dry weather during the second part of the off-season.

Cereal imports in 2015/16 marketing year (April/March) forecast to decrease from last year's record level

Indonesia is one of the biggest importers of cereals in Far East Asia. Overall, cereal imports for the 2015/16 marketing year (April/March) are forecast at 11.8 million tonnes, some 5 percent below the record volume of the previous year. This is mainly the result of an anticipated 17 percent decrease in maize imports to 2.9 million tonnes, reflecting a good level of production in 2015 and a high level of carryover stocks. Wheat imports are anticipated to increase marginally and reach 7.9 million tonnes, reflecting sustained demand for the commodity. Similarly, rice exports in 2016 are forecast 400 000 tonnes up to 1.3 million tonnes, largely based on uncertainty over the outcome of the 2016 main season crop.

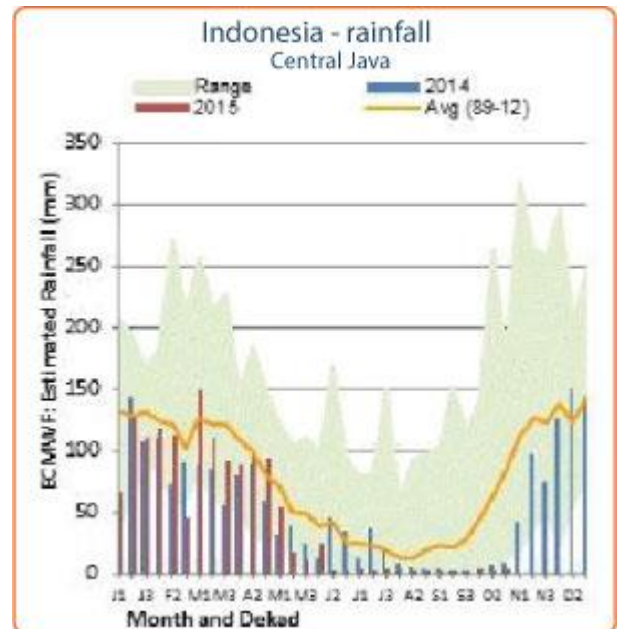
Rice prices at record levels in October

The average prices of medium quality rice, the main staple in the country, strengthened further to record highs in October, reflecting low stock levels and reduced output from the ongoing 2015 off-season harvest. Prices were also supported by concerns over the slow planting progress of the 2016 main season crop, due to dry weather. In an attempt to stabilize prices, the Government started to distribute, on 2 October, 300 000 tonnes of subsidized rice through the Raskin (rice-for-the-poor) programme and may import rice in the forthcoming months to ease the tight supply situation and reduce upward pressure on prices.

Concerns remain for vulnerable rural groups due to high prices and negative impact of dry weather on food production

Although current forecasts for the 2015 rice and maize outputs still point to an increase compared to 2014 level, significant localized production losses are expected, raising concerns for large numbers of subsistence farming families in the drought-affected provinces. Delays in the main planting season will also extend the lean season with possible negative impact on vulnerable households. The current dry weather also triggered forest and peat land fires over localized areas of Sumatera and Kalimantan islands, with official reports indicating some 43 million people affected by haze. Rains improved over much of Sumatra and Kalimantan in early November, providing some relief to the affected areas. Record high prices of main staple rice are expected to weigh heavily on food access and stress the food security situation of the most vulnerable population. The Government has allocated IDR 3.5 trillion (USD 258 million) intended to improve rice state reserves and stabilize the prices of staple foods, amid worries over the impact of the ongoing drought on food production.

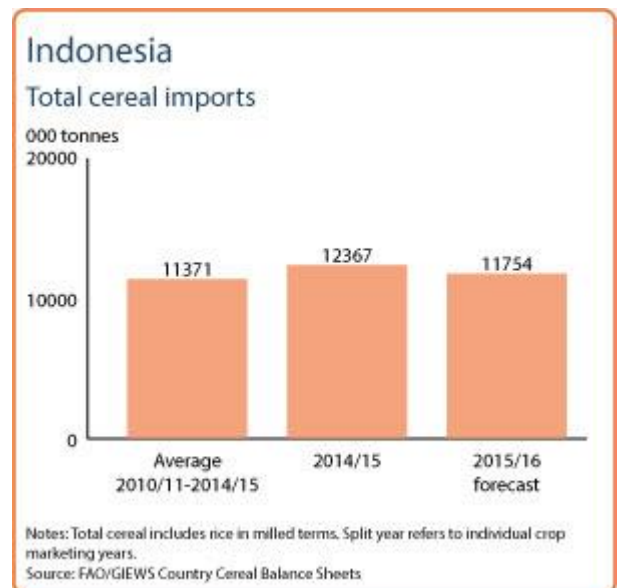
GIEWS is closely monitoring weather developments and the food situation, particularly in the most vulnerable eastern parts of the country. FAO and WFP country offices in coordination with the Government are providing technical support to monitor and increase preparedness to mitigate any potential negative impact of El Niño on vulnerable populations.



Indonesia
Cereal production

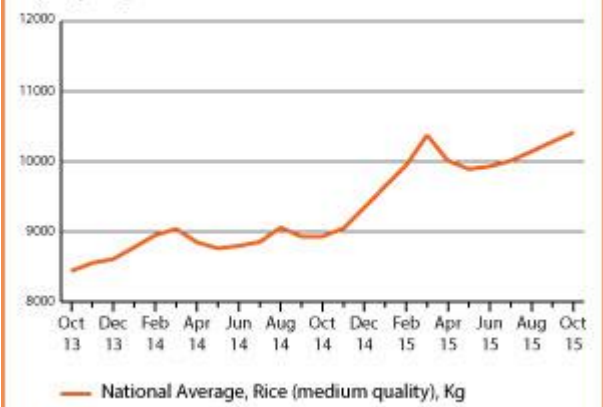
	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes			percent
Rice (paddy)	68 682	70 846	73 000	3
Maize	18 576	19 008	19 500	3
Others	0	0	0	0
Total	87 257	89 854	92 500	3

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



Indonesia Retail prices of rice

Rupiah per Kg



Source: Ministry of Trade

Reference Date: 13-November-2015

FOOD SECURITY SNAPSHOT

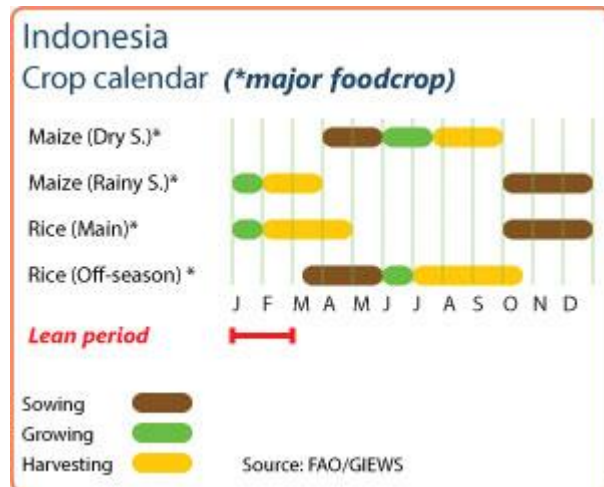
- **Widespread dry weather delays planting of 2016 main season crops**
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- **Cereal imports in 2015/16 marketing year (April/March) forecast to decrease from last year's record level**
- **Rice prices at record levels in October, reflecting reduced stock levels and lower 2015 off-season harvests**
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Dry weather delays planting of 2016 main season crops in key producing areas

Planting of the **2016**, mostly irrigated, main season paddy crop, which accounts for the bulk of annual production, usually starts with the onset of seasonal rains in early October and continues until December. However, following below-average rainfall during October this year over large parts of the country, plantings have been delayed. Furthermore, yields of the early-planted crops are expected to be negatively affected, particularly in the rainfed areas. Most-affected provinces include West Java, East Java, Central Java, North and South Sulawesi and Lampung, which, together, normally account for close to two-thirds of the country's annual rice production. The final outcome of the 2016 rice harvest will largely depend on the availability of water supplies for irrigation for the current main and forthcoming off-season, as approximately 85 percent of total rice area is irrigated. There are also concerns about planting of the 2016 main season maize crop, which has just started and normally continues into December. Seasonal rains could be delayed by four to eight weeks in most parts of the country. The Government has put in place measures to mitigate the impact of the current dry weather, through the rehabilitation of irrigation channels, building of new reservoirs and wells and distribution of water pumps to affected farmers. More rains are urgently needed in the coming weeks to avoid significant 2016 main season production declines in the rainfed areas.

Aggregate rice and maize production in 2015 revised down due to prolonged dry weather

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Harvesting of the 2015 maize crop was completed in October. Similarly to rice, the estimate of the 2015 aggregate maize output has been lowered from earlier expectations by 1.2 million tonnes to 19.5 million tonnes, following dry weather during the second part of the off-season.

Cereal imports in 2015/16 marketing year (April/March) forecast to decrease from last year's record level

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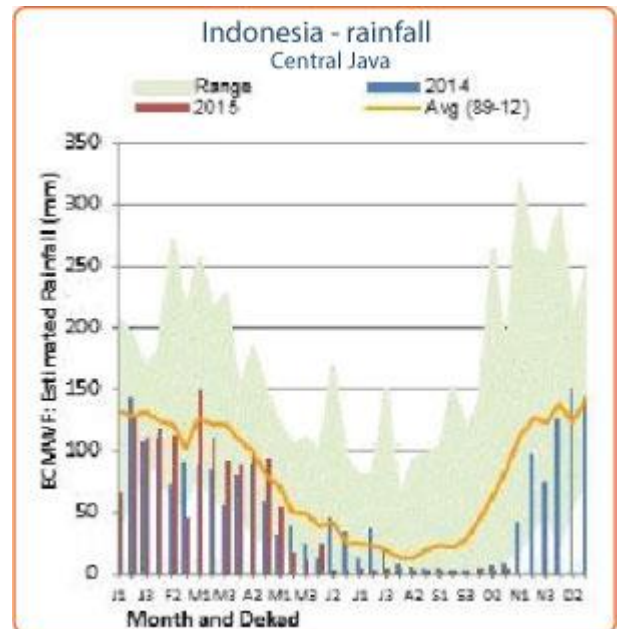
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Concerns remain for vulnerable rural groups due to high prices and negative impact of dry weather on food production

Although current forecasts for the 2015 rice and maize outputs still point to an increase compared to 2014 level, significant localized production losses are expected, raising concerns for large numbers of subsistence farming families in the drought-affected provinces. Delays in the main planting season will also extend the lean season with possible negative impact on vulnerable households. The current dry weather also triggered forest and peat land fires over localized areas of Sumatera and Kalimantan islands, with official reports indicating some 43 million people affected by haze. Rains improved over much of Sumatra and Kalimantan in early November, providing some relief to the affected areas. Record high prices of main staple rice are expected to weigh heavily on food access and stress the food security situation of the most vulnerable population. The Government has allocated IDR 3.5 trillion (USD 258 million) intended to improve rice state reserves and stabilize the prices of staple foods, amid worries over the impact of the ongoing drought on food production.

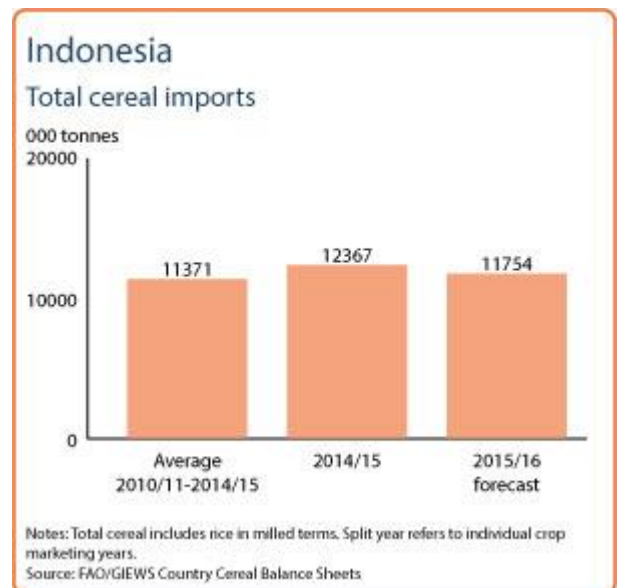
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Indonesia
Cereal production

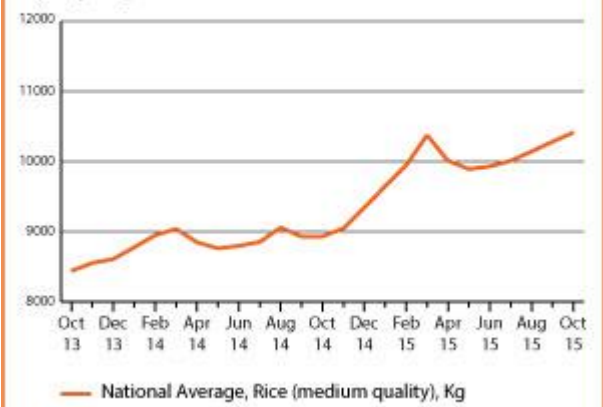
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	000 tonnes			percent
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Maize	18 576	19 008	19 500	3
Others	0	0	0	0
Total	87 257	89 854	92 500	3

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



Indonesia Retail prices of rice

Rupiah per Kg



Source: Ministry of Trade

Reference Date: 09-July-2015

FOOD SECURITY SNAPSHOT

- Aggregate 2015 rice production officially forecast at record level
- Concern about negative impact of El Niño event on 2015 secondary season cereal production at local level
- Cereal imports forecast to increase in 2015/16 marketing year (April/March)
- Rice prices were stable in June but at high levels

Aggregate 2015 rice production officially forecast at record level

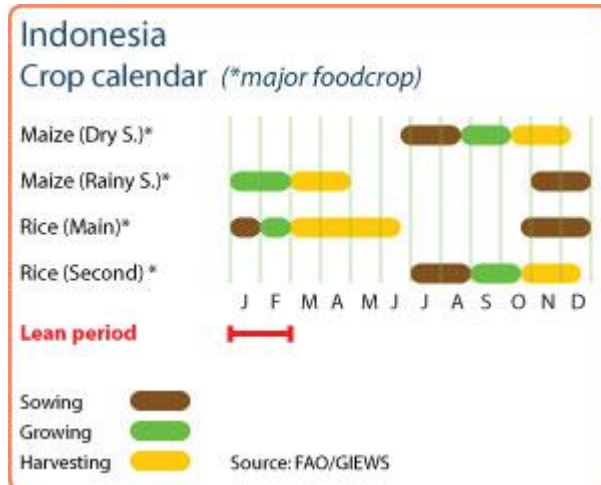
Harvesting of the 2015 main season paddy crop, which accounts for the bulk of the annual production, is complete. Despite a slow start of the 2014/15 rainy season (November/March), rains improved across most of the country from December onwards, allowing plantings to pick up. Favourable weather during the growing season, coupled with diverse initiatives launched by the Government to support production, including the rehabilitation of irrigation channels, distribution of subsidized seeds and fertilizers have supported good yields for the 2015 main season. The 2015 aggregate rice production, including the 2015 secondary (dry) season rice crop, now at the planting stage, is officially projected, at a record level of 75.6 million tonnes, up 7 percent from last year's good output.

Harvesting of the 2015 main (rainy) season maize crop was completed in April and sowing of the secondary (dry) season crop is currently ongoing and will continue into August. Latest official forecasts put the 2015 aggregate maize output at 20.7 million tonnes, some 9 percent above last year's bumper level. The projected increase is the result of a 4 percent expansion in plantings, in response to higher demand from the domestic feed industry, as well as higher yields following favourable weather during the main season.

In early March, reports from the main meteorological and oceanic institutions declared the onset of a weak to moderate El Niño event. The consensus of ENSO prediction models project an El Niño phenomenon to continue throughout 2015 and first months of 2016. This causes concern about the 2015 secondary cereal season, being planted and the forthcoming 2016 main crops, as the phenomenon is often associated in the country with below-average precipitation. Although rice production is not expected to be much affected at the national level in 2015, crop losses could be significant locally. Therefore, the weather and crop situation needs to be closely monitored, particularly in the most vulnerable eastern parts of the country.

Cereal imports forecast to increase in 2015/16 marketing year (April/March)

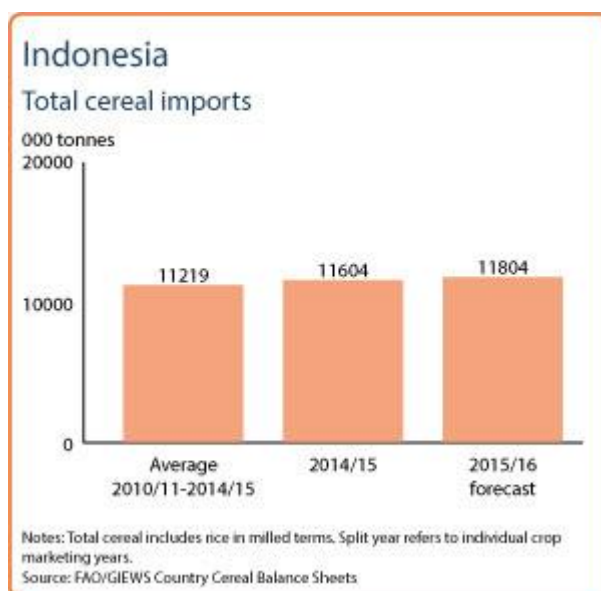
Indonesia is one of the biggest importers of cereals in Far East Asia. Overall, cereal imports for the 2015/16 marketing year (April/March) are estimated at 11.8 million tonnes, some 2 percent above the large volume of the previous year. This is mainly attributed to an



Indonesia Cereal production

	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes		percent	
Rice (paddy)	68 682	70 846	75 551	7
Maize	18 576	19 008	20 667	9
Others	0	0	0	0
Total	87 257	89 854	96 218	7

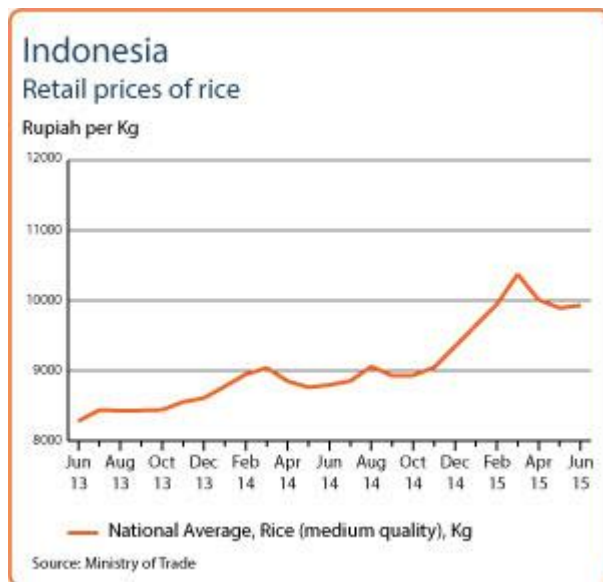
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



anticipated 3 percent increase in wheat imports to 7.9 million tonnes, reflecting sustained demand for the commodity. Similarly, imports of maize are forecast at 3 million tonnes, 4 percent above last year's level. By contrast, the 2015 rice imports are forecast to decrease by 10 percent to 900 000 tonnes, as a result of the favourable outlook for the 2015 rice production and self-sufficiency policies.

Rice prices were stable in June but at high levels

The average prices of medium quality rice, the main staple in the country, remained stable in June but close to their peaks of March. Despite the good supplies from the recently-completed 2015 main season harvest, significant lower rice imports in January-May this year, compared with the same period in 2014, have supported prices in recent months. Higher fuel prices have also provided support.



Reference Date: 19-May-2015

FOOD SECURITY SNAPSHOT

- Aggregate 2015 rice production forecast to increase from last year's bumper level
- Concern about negative impact of El Niño event on 2015 second season cereal production
- Cereal imports forecast to decrease in 2015/16 marketing year (April/March)
- Rice prices declined in April but still at near-record levels

Aggregate 2015 rice production forecast to increase from last year's bumper level

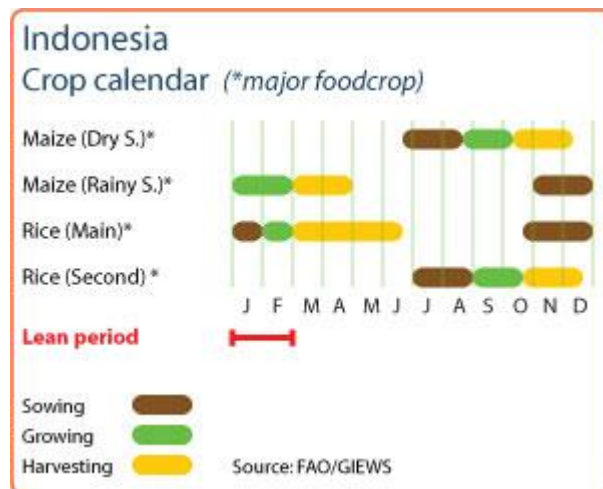
Harvesting of the 2015 main (rainfed) season paddy crop, which accounts for about 95 percent of the annual production, is well advanced. Following a slow start of the 2014/15 rainy season (November-March), which delayed planting activities particularly over the main producing areas of Java Island, rains improved across most of the country since December, allowing plantings to pick up and benefitting development of earlier-planted crops. Subsequently, favourable weather conditions, coupled with diverse initiatives launched by the Government to support production, including the rehabilitation of irrigation channels, distribution of subsidized seeds and fertilizers, have led to an anticipated increase in yields of the main season. In addition, assuming a slight expansion in area planted for the 2015 secondary (dry) season rice crop, to be planted between June and August, FAO forecasts the 2015 aggregate rice production at a record level of 73 million tonnes, up 3 percent from last year's bumper output.

Harvesting of the 2015 main (rainy) season maize crop was completed in April and sowing of the secondary (dry) season crop is expected to start in June and continue into August. FAO forecasts the 2015 aggregate maize output at 19.5 million tonnes, some 2 percent above last year's good level. The projected increase is the result of a slight expansion in plantings, in response to higher demand from the domestic feed industry and higher yields.

In early March, reports from the main meteorological and oceanic institutions declared the onset of a moderate El Niño event. Climate models point to an approximately 90 percent of El Niño through the northern hemisphere 2015 summer and a greater than 80 percent chance that it will last through 2015. The high probability of an El Niño event this year causes concern about cereal production in Indonesia, as the phenomenon is often associated with below-average precipitation which may result in reduced yields of the 2015 secondary season cereal crops and/or affect planting and yields of the 2016 main rainfed paddy crops.

Cereal imports forecast to increase in 2015/16 marketing year (April/March)

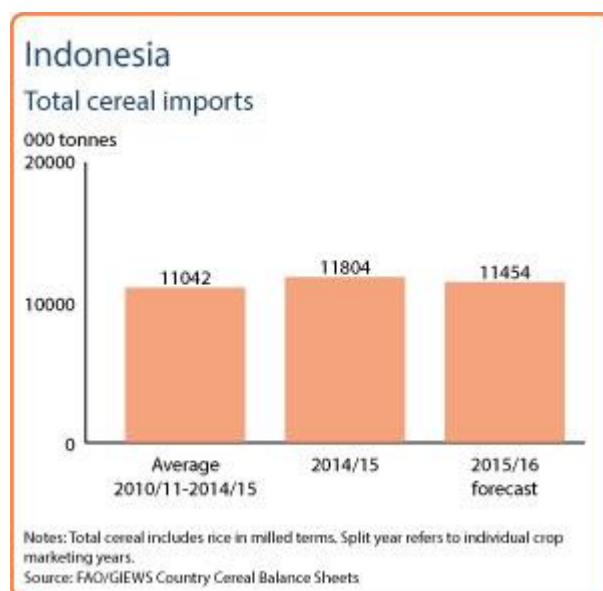
Indonesia is one of the biggest importers of cereals in the Far East Asia. Overall, cereal imports for the 2015/16 marketing year



Indonesia Cereal production

	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes			percent
Rice (paddy)	68 679	70 832	73 000	3
Maize	18 599	19 127	19 500	2
Others	0	0	0	0
Total	87 278	89 959	92 500	3

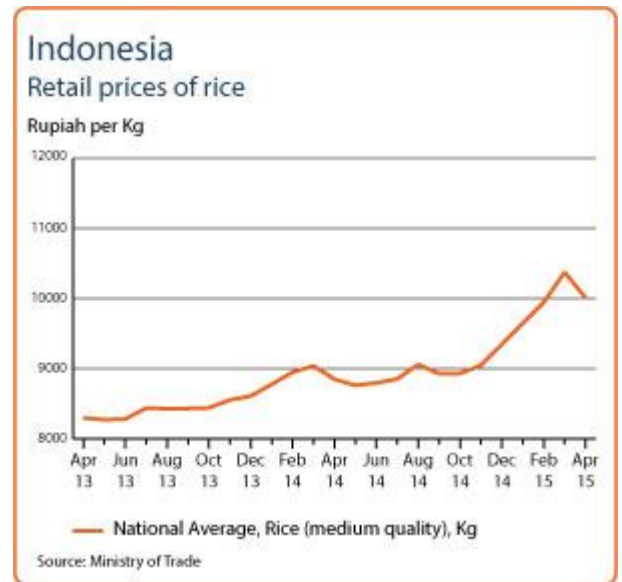
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



(April/March) are estimated at 11.5 million tonnes, some 3 percent below the large volume of the previous year. This is mainly attributed to an anticipated 25 percent decrease in 2015 rice imports to 900 000 tonnes, as a result of the favourable outlook for the 2015 rice production. Wheat imports are set to remain at last year's record level of 7.5 million tonnes, reflecting sustained demand for the commodity. Similarly, imports of maize are anticipated to remain close to the 2014/15 high level and reach 3 million tonnes.

Rice prices at near-record levels in April but declining

The average price of medium quality rice, the main staple in the country, were at near-record levels in April after the sustained increase of the past months, supported by higher procurement prices since January, coupled with delays in the distribution of rice through the Government's "Rice for the Poor" (Raskin) programme. In order to offset price increases, the Government has distributed nearly 500 000 tonnes of rice since January. Quotations declined in April with the arrival of new supplies from the 2015 main season harvest, estimated at a good level, despite some delays in the season, which had previously provided some support to prices.



Reference Date: 06-March-2015

FOOD SECURITY SNAPSHOT

- Good prospects for 2015 main season rice crop
- Aggregate rice production in 2014 estimated slightly below previous year's record level
- Cereal imports expected to increase in 2014/15 marketing year (April/March)
- Rice prices at record levels in February

Good prospects for 2015 main season rice crop

Harvesting of the 2015 main (wet) season paddy crop is currently ongoing and will continue until mid-July. Over much of the country, including the main crop producing areas of Java and Sulawesi, rainfall was generally above-average between November and late February. However, below-average rains between January and early March over parts of Sumatera Island, particularly the provinces of Riau, Jambi and Sumatera Utara, reduced soil moisture in some parts. Early official forecasts indicate that the aggregate paddy production (including the ongoing 2015 main season, which accounts for about 95 percent of the annual production and the forthcoming 2015 secondary season) is expected to reach 73.4 million tonnes, some 4 percent above last year's slightly reduced crop. The anticipated increase is mainly attributed to Government support in the rehabilitation of irrigation channels and the distribution of subsidized seeds and fertilizers, as well as the expected increase in planted area.

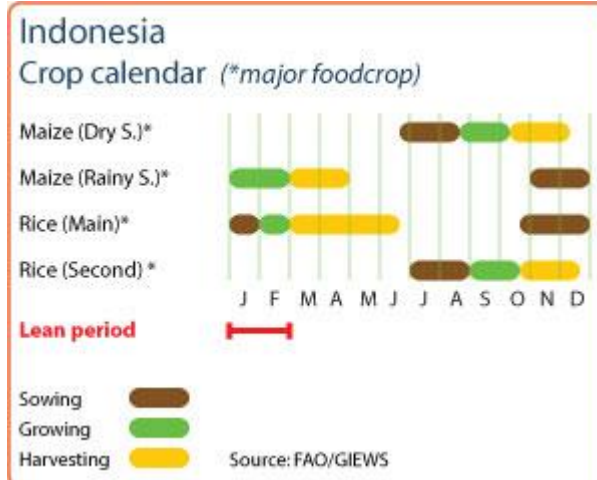
Aggregate rice production in 2014 estimated slightly below previous year's record level

Latest official estimates put the 2014 aggregate rice production at 70.6 million tonnes, slightly below last year's record level. The decrease is the result of a slight contraction in planted area, reflecting a shift from paddy land to other crops, as well as planting disruptions due to floods from mid-January to late February, particularly in parts of West Java.

The 2014 aggregate maize output is officially forecast at 19.1 million tonnes, 3 percent above the 2013 harvest and marginally below the 2012 record output.

Cereal imports estimated to increase in 2014/15 marketing year (April/March)

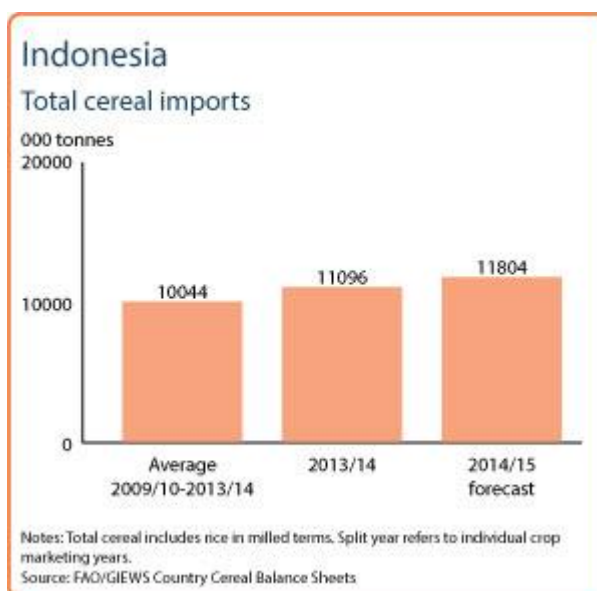
Indonesia is one of the biggest importers of cereals in the Far East subregion. For the 2014/15 marketing year (April/March) wheat imports are estimated to increase by 3 percent compared to the previous year to a record level of 7.5 million tonnes, reflecting sustained demand for the commodity. Similarly, imports of maize are expected to remain at last year's high level and reach 3 million tonnes. Rice imports in 2014 are estimated to return to more normal quantities and reach 1.2 million tonnes. Overall, cereal imports for the 2014/15 marketing year (April/March) are estimated at 11.8 million tonnes, some 6 percent above the large volume of the previous year and about 17 percent higher than the five-year average.



Indonesia Cereal production

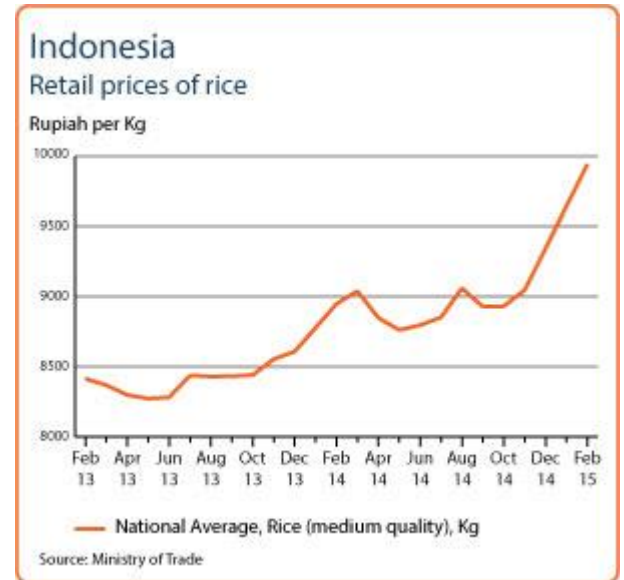
	2009-2013 average	2013	2014 estimate	change 2014/2013
	000 tonnes			percent
Rice (paddy)	67,392	71,280	70,607	-1
Maize	18,300	18,512	19,127	3
Others	0	0	0	0
Total	85,692	89,792	89,734	0

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



Rice prices at record levels in February

The average price of medium quality rice increased for a third consecutive month reaching a record in February, mainly reflecting a delay in the distribution of rice through the Government's "Rice for the Poor" (Raskin) programme and a 10 percent increase in the Government's procurement price, after remaining unchanged for three years. In an attempt to stabilize prices, the Government started, on 25 February, to distribute 300 000 tonnes of subsidized rice at IDR 7 400 (about USD 0.57) per kg, about 26 percent below February's market price.



Reference Date: 10-September-2014

FOOD SECURITY SNAPSHOT

- The 2014 aggregate rice production forecast slightly below last year's record level
- Cereal imports expected to increase in the 2014/15 marketing year (April/March)
- Rice prices at record levels in August
- Overall food security situation satisfactory but localized food insecurity persists

The 2014 aggregate rice production forecast slightly below last year's record level

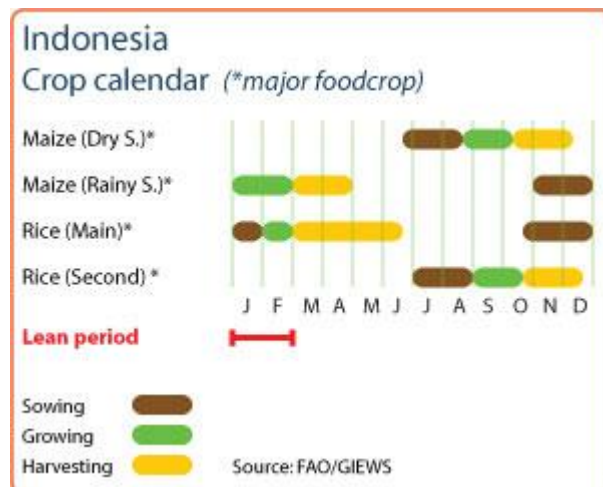
Harvesting of the 2014 main (wet) season paddy crop, which accounts for about 95 percent of annual production, was completed by June, while that of the 2014 secondary season crop is expected to start in mid-October and continue into December. Latest official forecasts put this year's aggregate rice production (including the 2014 main and secondary seasons) at 69.9 million tonnes, slightly below last year's record level. The expected decrease is the result of a slight contraction in planted area, reflecting a shift from paddy land to other crops, as well as planting disruptions due to floods from mid-January to late February, particularly in parts of West Java.

Harvesting of the 2014 main (rainy) season maize crop was completed in April and that of the 2014 secondary (dry) season crop will start in mid-October and will be completed in December. The 2014 aggregate maize output is officially forecast at 18.6 million tonnes, similar to last year's above-average harvest and slightly below the 2012 record output.

The probability of an El Niño event in the last quarter of the year has been recently lowered to 60 percent. The phenomenon is often associated with below-average precipitation and the past moderate El Niño events resulted in production declines in the country. Depending on the timing and intensity of an eventual El Niño, the 2015 main rainfed paddy crops, which are planted from late October, may be negatively affected by the event.

Cereal imports expected to increase in the 2014/15 marketing year (April/March)

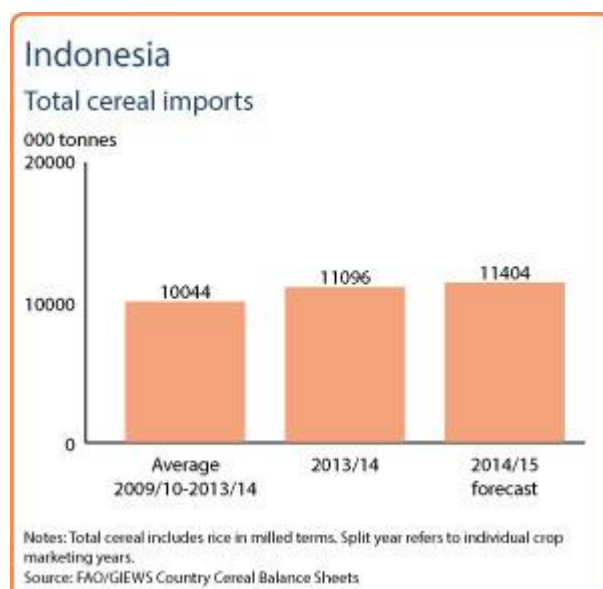
Indonesia is one of the biggest importers of cereals with quantities of some 11 million tonnes annually. For the 2014/15 marketing year (April/March) wheat imports are forecast close to last year's record level at 7.4 million tonnes, reflecting sustained demand for the commodity. Similarly, imports of maize are expected to remain high at 2.7 million tonnes. Rice imports in 2014 are anticipated to return to more normal quantities and reach 1.2 million tonnes, some 70 percent above the low level of 2013 following the Government's self-sufficient policy. Overall, cereal imports for the 2014/15 marketing year (April/March) are thus forecast at 11.4 million tonnes, some 3 percent above the large volume of the previous year and about 14 percent higher than the five-year average.



Indonesia Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes		percent	
Rice (paddy)	67 392	71 280	69 871	-2
Maize	18 300	18 512	18 579	0
Others	0	0	0	0
Total	85 692	89 792	88 450	-1

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

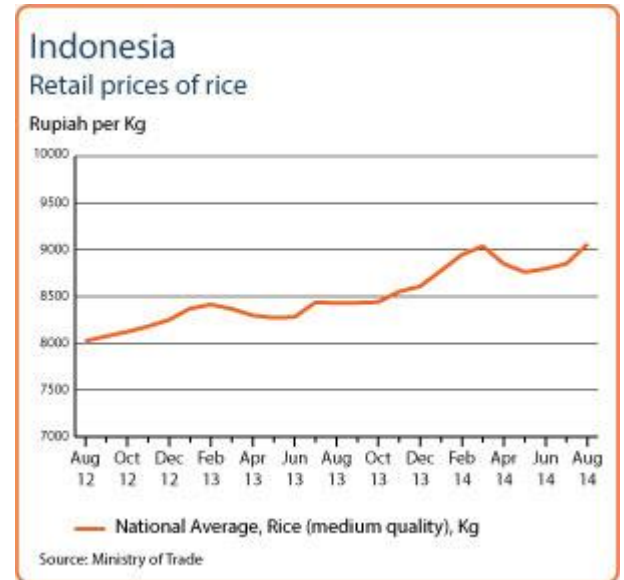


Rice prices at record levels in August

The average price of medium quality rice increased slightly in August but reached record highs. Prices were above their year earlier levels both in nominal and real terms, supported by the contraction of this year's paddy output and low imports in previous months.

Overall food security situation satisfactory but localized food insecurity persists

In general, the food security situation in the country continues to be stable and satisfactory. Recently, Indonesia graduated from the list of Low-Income Food-Deficit Countries (LIFDC) on the basis of net food-exporter and on income criteria. However, high food prices are affecting the food security situation of vulnerable low-income groups of the population.



Reference Date: 24-July-2014

FOOD SECURITY SNAPSHOT

- The 2014 aggregate rice production forecast close to last year's record level
- Cereal imports expected to increase in the 2014/15 marketing year (April/March)
- Rice prices generally stable but at high levels
- Overall food security situation satisfactory but localized food insecurity persists

The 2014 aggregate rice production forecast close to last year's record level

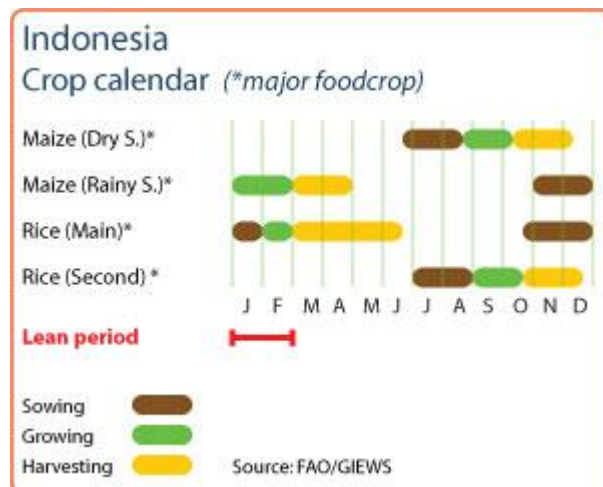
Harvesting of the 2014 main (wet) season paddy crop, which accounts for about 95 percent of annual production, was completed by June, while planting of the 2014 secondary season crop is currently underway and will continue into August. Recently released official estimates put this year's aggregate rice production (including the 2014 main and secondary seasons) at 69.9 million tonnes, slightly below last year's record level but the second best on record. The expected decrease is the result of a slight contraction in planted area, reflecting a shift from paddy land to other crops, as well as planting disruptions due to floods from mid-January to late February, particularly in parts of West Java.

Harvesting of the 2014 main (rainy) season maize crop was completed in April and sowing of the 2014 secondary (dry) season crop is ongoing. The 2014 aggregate maize output is officially anticipated at 18.5 million tonnes, similar to last year's above-average harvest and slightly below the 2012 record output.

The high probability (65 percent) of an El Niño event in the last quarter of this year causes concern about cereal production in Indonesia, as the phenomenon is often associated with below-average precipitation and the past moderate El Niño events resulted in production declines in the country. However, based on currently available information, an El Niño phenomenon is still neutral and a weak event appears more likely. Depending on the timing of an eventual El Niño, yields of the 2014 secondary season cereals crops and/or planting of the 2015 main rainfed paddy crops may be negatively affected by the event.

Cereal imports expected to increase in the 2014/15 marketing year (April/March)

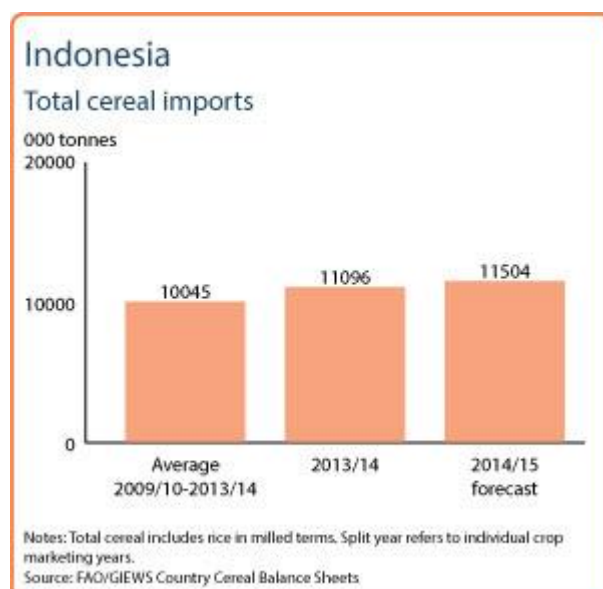
Indonesia is one of the biggest importers of cereals with quantities of some 10 million tonnes annually. For the 2014/15 marketing year (April/March) wheat imports are forecast close to last year's record level at 7.2 million tonnes, reflecting sustained demand for the commodity. Similarly, imports of maize are forecast at near-record level of 2.9 million tonnes. Rice imports in 2014 are forecast to return to more normal levels and reach 1.2 million tonnes, some 70 percent above the low level of 2013 following the Government's self-sufficient policy. Total cereal imports for the 2014/15 marketing year (April/March) are thus estimated at 11.5 million tonnes, some



Indonesia Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes			percent
Rice (paddy)	67 392	71 280	69 871	-2
Maize	18 300	18 512	18 549	0
Others	0	0	0	0
Total	85 692	89 792	88 420	-2

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



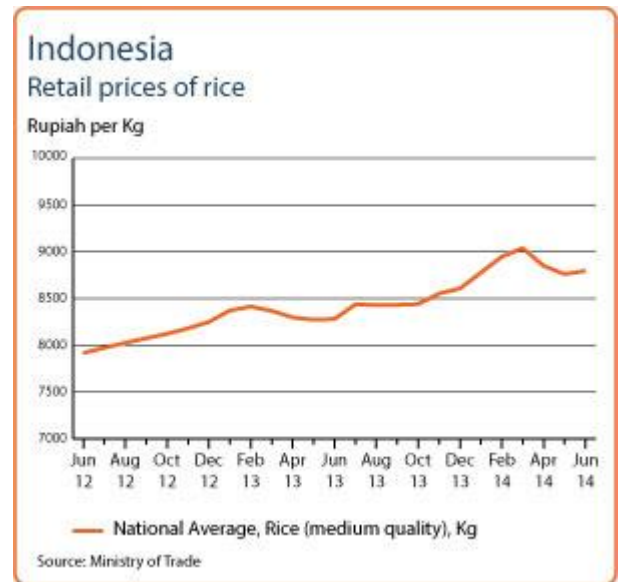
4 percent above the large volume of the previous year and about 15 percent higher than the five-year average.

Rice prices generally stable but at high levels

The average price of medium quality rice were unchanged in June, after some declines in the previous months with the recently-completed 2014 main season paddy harvest. Prices remained above their levels in June 2013, in line with the year-on-year inflation rate (6.7 percent in June). In an attempt to avoid price increases during the month of Ramadan, which began in late June, the country's state logistic company, BULOG, announced the release of medium quality rice at below market prices.

Overall food security situation satisfactory but localized food insecurity persists

In general, the food security situation in the country continues to be stable and satisfactory. However, access to food for the vulnerable population, remains a major challenge in the eastern parts of the country such as Nusa Tenggara Timur, Nusa Tenggara Barat and Papua provinces. Generally high food prices are further affecting the food security situation of vulnerable low-income groups of the population.



Reference Date: 17-June-2014

FOOD SECURITY SNAPSHOT

- The 2014 main season paddy and maize outputs estimated higher than last year
- Cereal imports forecast to increase in the 2014/15 marketing year (April/March)
- Rice prices fell in the past two months but remain at high levels
- Overall food security situation satisfactory but localized food insecurity persists

Production of the 2014 main season paddy and maize is estimated to increase

Harvesting of the 2014 main (wet) season paddy crop, which accounts for about 95 percent of annual production, is nearing completion, while planting of the 2014 secondary season crop is expected to start shortly and will continue into August. Overall, the main season was characterized by normal to above-normal rainfall over much of the country, benefiting development of the rice crop. However, heavy rains from mid-January to late February resulted in localized flooding causing some limited crop damage particularly in parts of West Java, an important rice-growing area. By contrast, some rainfall deficit was recorded between early March and late April in parts of the Island of Sumatra and West Kalimantan. In spite of these localized adverse weather conditions, the overall damage to the 2014 main season paddy crop is expected to be minimal. As a result, the national paddy output is preliminarily forecast to reach 72 million tonnes, similar to last year's record level.

Harvesting of the 2014 main (rainy) season maize crop was completed in April and sowing of the 2014 secondary (dry) season crop is ongoing. FAO's latest projections put this year's maize output at 19.1 million tonnes, some 3 percent above last year's harvest and slightly below the 2012 record output.

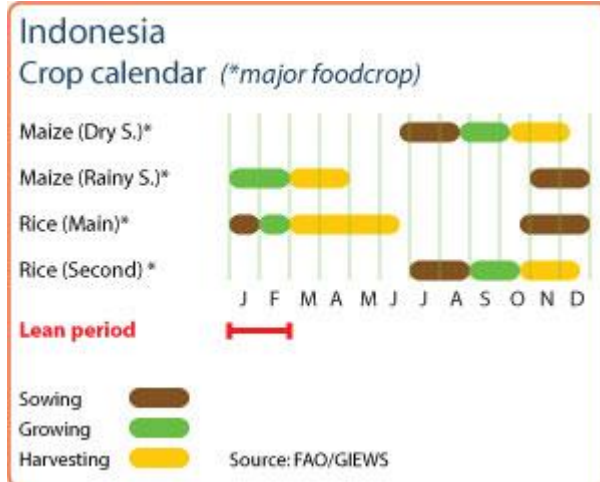
Cereal imports forecast to increase in the 2014/15 marketing year (April/March)

Indonesia is one of the biggest importers of cereals with quantities of some 10 million tonnes annually. For the 2014/15 marketing year (April/March) wheat imports are forecast to increase slightly to 7.2 million tonnes, reflecting higher demand for the commodity.

Rice imports in 2014 are forecast to return to more normal levels and reach 1.1 million tonnes, some 60 percent above the low level of 2013. Imports of maize are forecast to remain similar to the previous year's level at 2.8 million tonnes. Total cereal imports for the 2014/15 marketing year (April/March) are thus estimated at 11.2 million tonnes, slightly above the large volume of the previous year and about 12 percent higher than the five-year average.

Rice prices fell in the past two months but remain at high levels

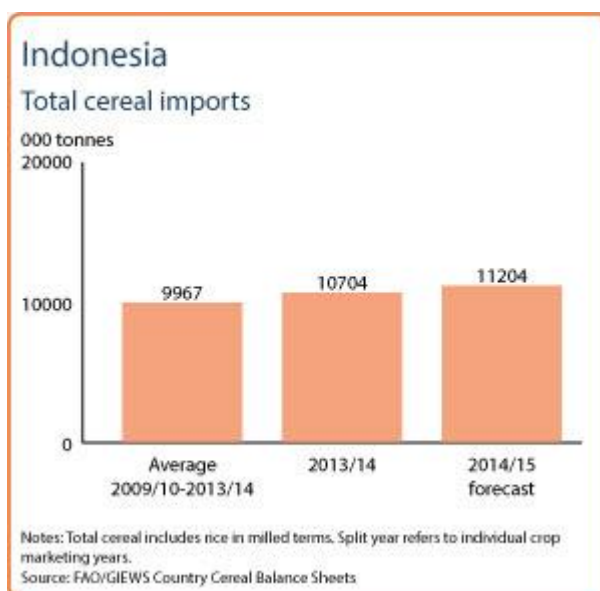
The average price of medium quality rice, after strengthening



Indonesia
Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes			percent
Rice (paddy)	67 395	71 292	72 000	1
Maize	18 299	18 506	19 100	3
Others	0	0	0	0
Total	85 693	89 798	91 100	1

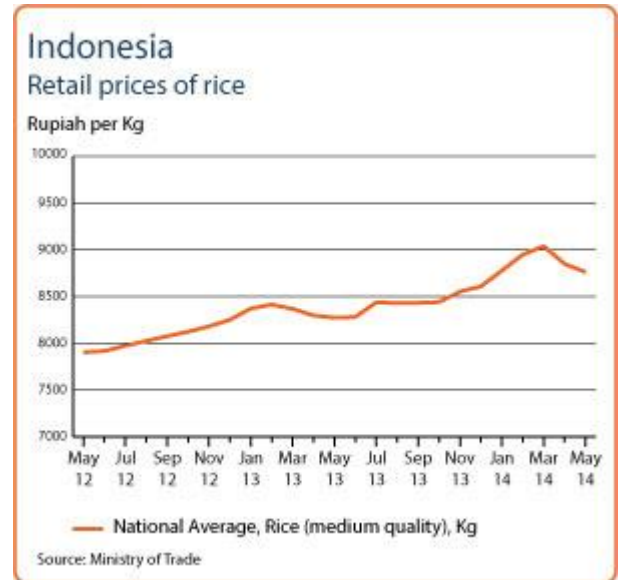
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



between October 2013 and March 2014, decreased for the second consecutive month in May, with good supplies from the 2014 main season harvest. However, prices were above their levels a year earlier, in line with the year-on-year inflation rate (7 percent in May).

Overall food security situation satisfactory but localized food insecurity persists

In general, the food security situation in the country continues to be stable and satisfactory. However, access to food for the vulnerable population, remains a major challenge in the eastern parts of the country such as Nusa Tenggara Timur, Nusa Tenggara Barat and Papua provinces. High food prices are further affecting the food security situation of vulnerable low-income groups of the population. The recent floods and the volcanic eruptions displaced tens of thousands, exacerbating the situation.



Reference Date: 04-April-2014

FOOD SECURITY SNAPSHOT

- Prospects for the 2014 main season paddy and maize crops, being harvested, are favourable
- Cereal imports estimated at high levels in 2013/14 (April/March) for the second consecutive year
- Rice prices at record levels in nominal terms
- Overall food security situation satisfactory but localized food insecurity persists

Prospects for the 2014 main season paddy and maize crops are favourable

Harvesting of the 2014 main (wet) season paddy crop, which accounts for about 95 percent of annual production, began in early-March and is expected to continue until mid-June. The start of the season was characterized by normal to above-normal rainfall over much of the country, facilitating planting and early development of the rice crop. However, heavy rains from mid-January to late February resulted in localized flooding causing some limited crop damage particularly in parts of West Java, an important rice-growing area. By contrast, some rainfall deficit was recorded over the same period in parts of the Island of Sumatra and West Kalimantan. In spite of these localized adverse weather conditions, the overall damage to the 2014 main season paddy crop is expected to be minimal. The national paddy output is preliminarily forecast to reach 72 million tonnes, similar to last year's record level.

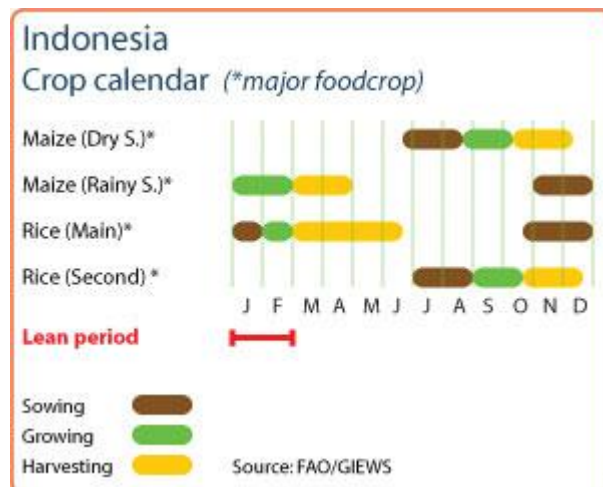
The overall prospects for the 2014 main (rainy) season maize crop, currently being harvested, are also generally good. Production is preliminarily forecast at 19.1 million tonnes, some 3 percent above last year's dry weather-affected harvest and slightly below the 2012 record output.

Cereal imports estimated high in 2013/14 marketing year (April/March)

Indonesia is one of the biggest importers of cereals with quantities of some 10 million tonnes annually. For the 2013/14 marketing year (April/March) wheat imports are estimated to have increased to 7.1 million tonnes, some 6 percent higher than in the previous year, reflecting higher demand for the commodity. Rice imports in 2013 are put at 700 000 tonnes, less than half of the volume imported in 2012 and much lower than the actual rice imports of 2.9 million tonnes in 2011. Imports of maize are estimated at 2.2 million tonnes, an increase of 10 percent compared to the 2012/13 above-average level on account of the reduction in the 2013 maize harvest. The total cereal imports for the 2013/14 marketing year (April/March) are thus estimated at 10.1 million tonnes, slightly below the large purchases of the previous year but about 14 percent above the five-year average.

Rice prices at record levels in nominal terms

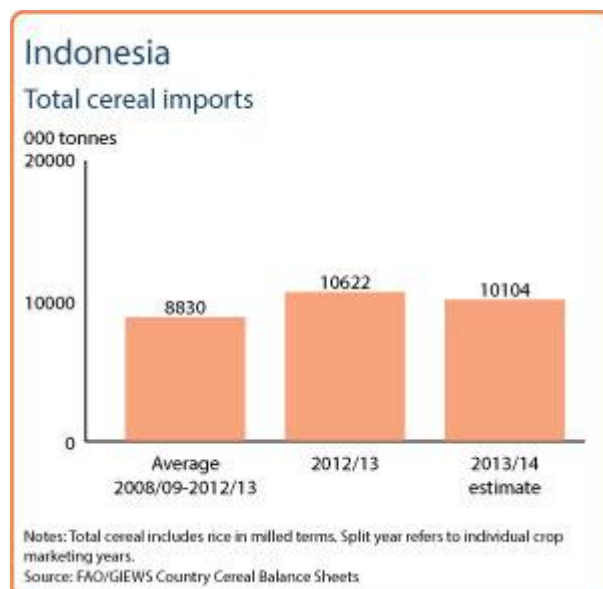
The average price of medium quality rice, after strengthening in recent months due to uncertainty about flood damage to the 2014 crop, increased only marginally in March reaching a new record, in



Indonesia Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes		percent	
Rice (paddy)	67,395	71,292	72,000	1
Maize	18,299	18,506	19,100	3
Others	0	0	0	0
Total	85,693	89,798	91,100	1

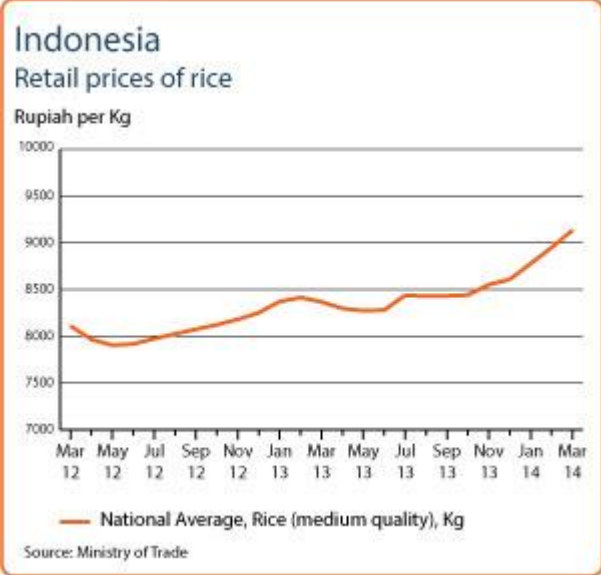
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



nominal terms. At their March level, rice prices were 8 percent higher than a year earlier in line with the year-on-year food inflation of 7.3 percent.

Overall food security situation satisfactory but localized food insecurity persists

In general, the food security situation in the country continues to be stable and satisfactory. However, access to food for the vulnerable population, remains a major challenge in the eastern parts of the country such as Nusa Tenggara Timur, Nusa Tenggara Barat and Papua provinces. High food prices are further affecting the food security situation of vulnerable low-income groups of the population. The recent floods and the volcanic eruptions displaced tens of thousands, further exacerbating the food security concerns of the affected population.



Reference Date: 15-January-2014

FOOD SECURITY SNAPSHOT

- Rice production in 2013 estimated at a record level
- Cereal imports forecast to remain at high levels in 2013/14 (April/March)
- Despite good production, domestic prices of rice reach record levels mainly due to high fuel costs and inflation
- Overall food security situation satisfactory but localized food insecurity persists

Early prospects for the 2014 main season paddy crop are favourable

Currently the main (wet) season paddy and maize crops are growing under normal-to-above-normal rainfall conditions and will be ready for harvest from March. The remotely sensed data, as of the first dekad of January 2014, indicates generally satisfactory vegetation in much of the country. However, some recent flooding in Sumatra and Java is reported; annual floods in the country may affect this season's final harvest.

2013 rice production reached a record level

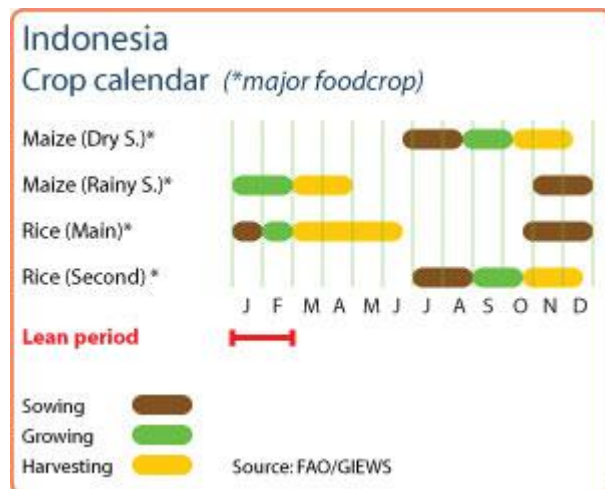
Harvesting of the 2013 main (wet) season paddy crop was completed in June, while that of the secondary (dry) season was finalized by mid-December. The aggregate 2013 rice production is officially estimated at a record level at 70.9 million tonnes (44.6 million tonnes on milled basis), marking an increase of 2.6 percent relative to the 2012 previous record output. The increase is mainly attributed to an expansion of about 2.4 percent in area planted and slightly higher yields following generally favourable weather. However, in spite the record national production unusually wet conditions between April and June decreased somewhat yields of the secondary season crops, particularly in parts on the Island of Java.

Harvesting of the 2013 maize crop was completed in early December. The 2013 aggregate maize output is officially estimated at 18.5 million tonnes, some 5 percent lower than last year's record level but above the previous five-year average. The decrease in production mainly reflects an estimated 2 percent reduction in plantings and lower yields of the dry season crop following below average rains from early July to mid-September 2013 in the key producing areas of East and Central Java.

Cereal imports forecast to remain high in 2013/14 marketing year (April/March)

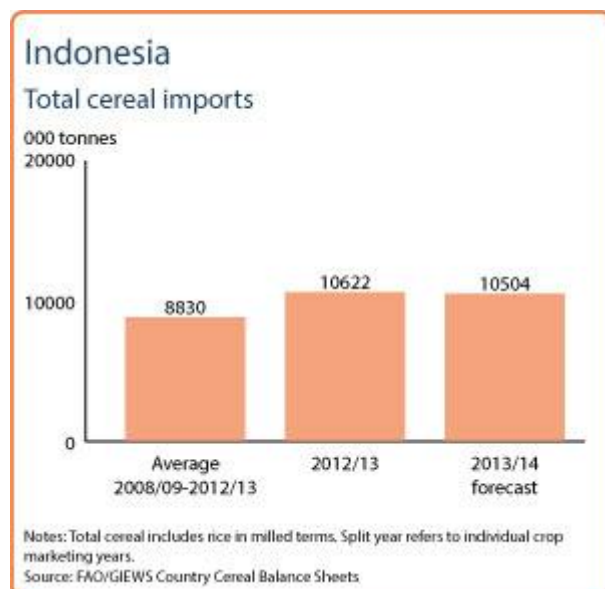
Indonesia is one of the biggest importers of cereals with quantities of some 10 million tonnes annually. For the 2013/14 marketing year (April/March) wheat imports are estimated to increase to 7.2 million tonnes, some 7 percent higher than in the past year, partly reflecting higher demand for the commodity.

Given a second consecutive bumper paddy production in 2013, rice imports are forecast at 800 000 tonnes, approximately half the volume imported in 2012 and much lower than the actual rice imports



	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes		percent	
Rice (paddy)	65 201	69 056	70 867	3
Maize	17 861	19 387	18 510	-5
Others	0	0	0	0
Total	83 062	88 443	89 377	1

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



of 2.9 million tonnes in 2011. Imports of maize for the 2013/14 marketing year (April/March) are forecast at 2.4 million tonnes, compared to the estimated 2 million tonnes in 2012/13. The increase is mainly on account of an estimated reduction in 2013 maize harvest.

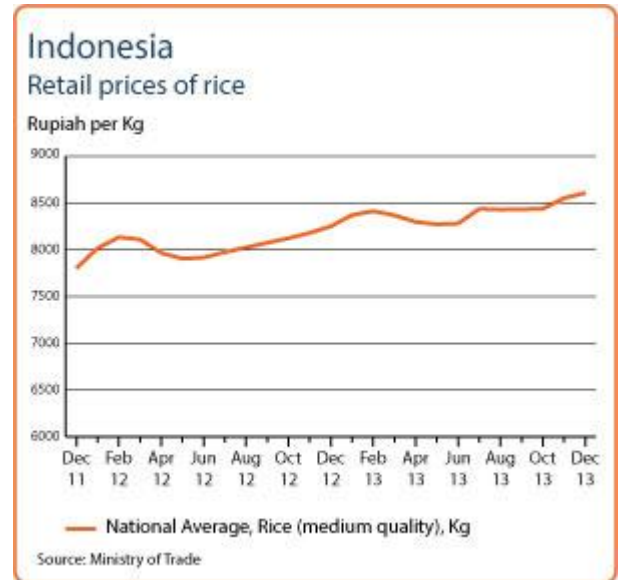
The total cereal imports for the 2013/14 marketing year (April/March) are thus forecast at 10.5 million tonnes, slightly below the large purchases of the previous year but about 19 percent above the five-year average.

Rice prices at record levels

The average price of medium quality rice increased slightly in December reaching a new record in nominal terms, despite the recent completion of the 2013 secondary *dry* season harvest. Rice prices have been mainly supported by high fuel prices and the general price inflation that reached 8.4 percent in December 2013. The year-on-year food inflation reached 11.4 percent in December.

Overall food security situation satisfactory but localized food insecurity persists

In general, the food security situation in the country continues to be stable and satisfactory. However, access to food for the vulnerable population, remains a major challenge in the eastern parts of the country such as Nusa Tenggara Timur (NTT), Nusa Tenggara Barat (NTB) and Papua provinces. High food prices are further affecting the food security situation of vulnerable-low income groups of population.



Reference Date: 04-October-2013

FOOD SECURITY SNAPSHOT

- The 2013 rice production to remain around the record level of last year
- Domestic prices of rice stable in recent months
- Cereal imports forecast to remain firm in 2013/14 (April/March)
- Overall food security situation satisfactory but localized food insecurity persists

The 2013 rice production to remain around the record level of last year

Harvesting of the 2013 secondary (dry) season paddy crop is currently underway and will continue into December, while that of the 2013 main (rainy) season was completed by June.

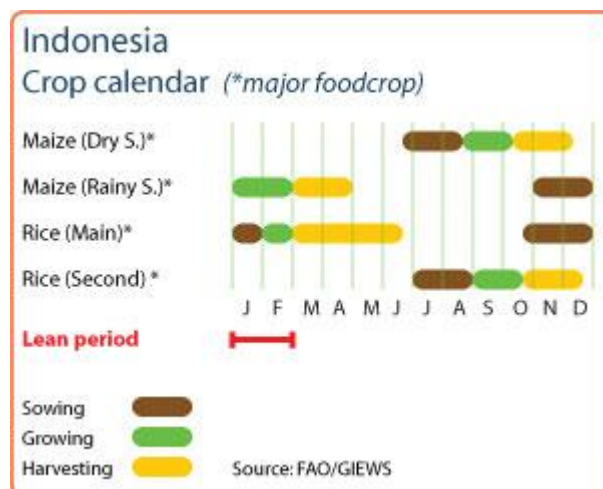
Heavy downpours during December and late February resulted in localised flooding causing some damage to the main season paddy crop, particularly in parts of Bojonegoro (north-eastern Java), Aceh Besar (northern Sumatra), West Sumbawa (western Sumbawa) and South Kalimantan. Furthermore, unusually wet conditions between April and June, particularly over parts of the Island of Java, hindered planting activities of the secondary season crops. As a result of these localized adverse weather conditions, official forecast of the 2013 national paddy output have been revised downwards to a still record level of 69.3 million tonnes, marginally above the last year's bumper output.

Harvesting of the 2013 main (rainy) season maize crop was completed in April and that of the 2013 secondary (dry) season is ongoing and will be concluded in December. The 2013 aggregate maize output is officially forecast at 18.8 million tonnes, some 3 percent lower than last year's record level but above the previous five-year average. The decrease in production mainly reflects an estimated 2 percent reduction in plantings and slightly lower yields following below average rains from early July to mid-September 2013 in the key producing areas of East and Central Java.

Cereal imports forecast to remain firm in 2013/14 marketing year (April/March)

Indonesia is one of the biggest importers of wheat and for the 2013/14 marketing year (April/March) wheat imports are estimated to increase to 7 million tonnes, some 5 percent higher than a year ago, reflecting, in part, higher demand for the commodity.

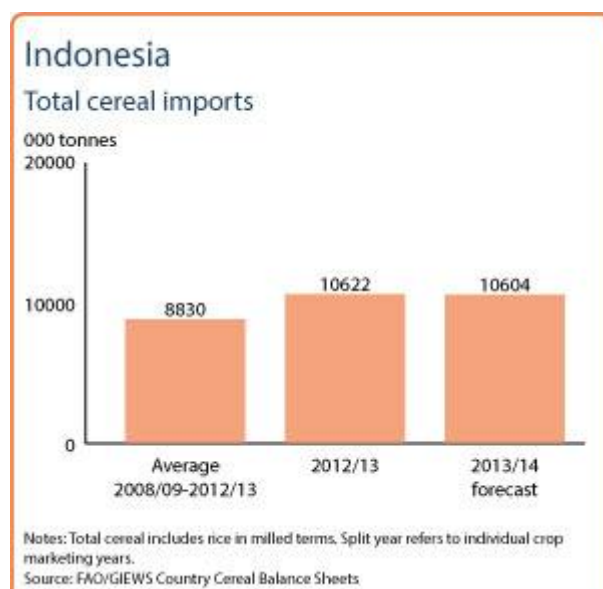
Given a second consecutive bumper paddy production in 2013, rice imports are forecast at 1.3 million tonnes, some 28 percent below the estimated level in 2012 and much lower than the actual rice imports of 2.9 million tonnes in 2011. Imports of maize for the 2013/14 marketing year (April/March) are forecast at 2.2 million tonnes, compared to the estimated 2 million tonnes imported in 2012/13. The increase is mainly on account of an estimated reduction in 2013 maize harvest.



Indonesia Cereal production

	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes			percent
Rice (paddy)	65 201	69 056	69 271	0
Maize	17 861	19 387	18 839	-3
Others	0	0	0	0
Total	83 062	88 443	88 110	0

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



The total cereal imports for the 2013/14 marketing year (April/March) are thus forecast at 10.6 million tonnes, similar to the large purchases of the previous year and about 20 percent above the five-year average.

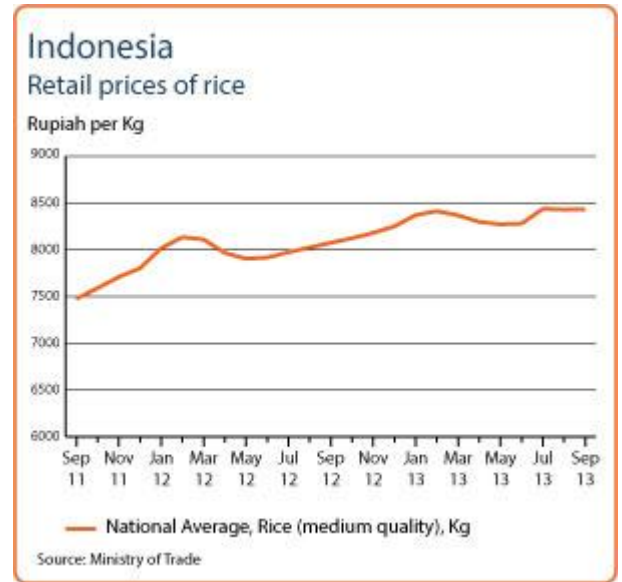
Rice prices stable in recent months

The average price of medium quality rice remained stable in September 2013 but at a near-record level, despite the beginning of the 2013 secondary (dry) season harvest, anticipated to be good. Prices were mainly supported by high fuel prices, after the Government decision in late June to raise the subsidised petrol prices by some 44 percent from IDR 4 500/litre to IDR 6 500/litre. The recent downward revision of the 2013 paddy production forecast provided further support.

The year-on-year consumer price index (CPI) in September 2013 was recorded at 8.4 percent, slightly below the rate in August. The year-on-year food inflation reached 12.8 percent in September.

Overall food security situation satisfactory but localized food insecurity persists

In general, the food security situation in the country continues to be stable and satisfactory. However, access to food for the vulnerable population, remains a major challenge in the eastern parts of the country such as Nusa Tenggara Timur (NTT), Nusa Tenggara Barat (NTB) and Papua provinces. High food prices are further affecting the food security situation of vulnerable groups of population.



Reference Date: 21-June-2013

FOOD SECURITY SNAPSHOT

- Production of rice is estimated to increase, while that of maize is expected to decline
- Domestic prices of rice weakened seasonally since March 2013
- Higher cereal imports for current 2013/14 (April/March) marketing year
- Overall food security situation satisfactory but localized food insecurity persists

Production of rice is estimated to increase, while that of maize is expected to decline

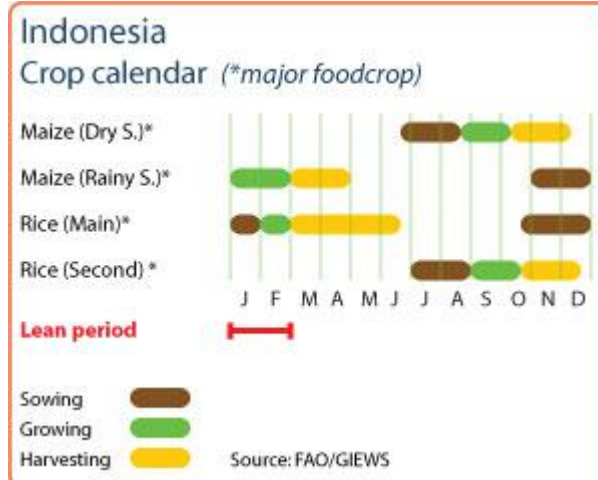
Harvesting of the 2013 main season paddy crop is nearing completion, while planting of the 2013 secondary season is expected to start shortly and will continue into August. Heavy downpours during December and late February resulted in localised flooding causing some damage to cropped land, particularly in parts of Bojonegoro (north-eastern Java), Aceh Besar (northern Sumatra), West Sumbawa (western Sumbawa) and South Kalimantan. The rains returned to a more normal pattern between mid-March and mid-June across main rice producing areas. In spite of these localized adverse weather at the start of the 2013 main season which caused moderate damage to paddy crop, the national paddy output is forecast to reach 72.1 million tonnes, some 4 percent above last year's record crop. The anticipated increase is mainly attributed to diverse initiatives launched by the government in order to achieve self-sufficiency target, as well as the estimated increase in area planted to the crop.

Harvesting of the 2013 main (rainy) season maize crop was completed in April and sowing of the 2013 secondary (dry) season maize crop is ongoing. The 2013 aggregate maize output is forecast at 18.3 million tonnes, some 4 percent lower than last year but above the previous five year average. The decrease in production mainly reflects poor rainfall in late February and March 2013, at a critical stage in the maize crop's development, over the key producing areas of East and Central Java.

Record cereal production in 2012

The 2012 paddy crop was harvested by mid-December. The latest official estimate point to a record harvest of about 69 million tonnes (rice in paddy terms), showing an increase of some 5 percent from the 2011 above-average output. The increase is predominantly attributed to an expansion in the planted area in the Kalimantan region located in Borneo and generally favourable weather during the growing period.

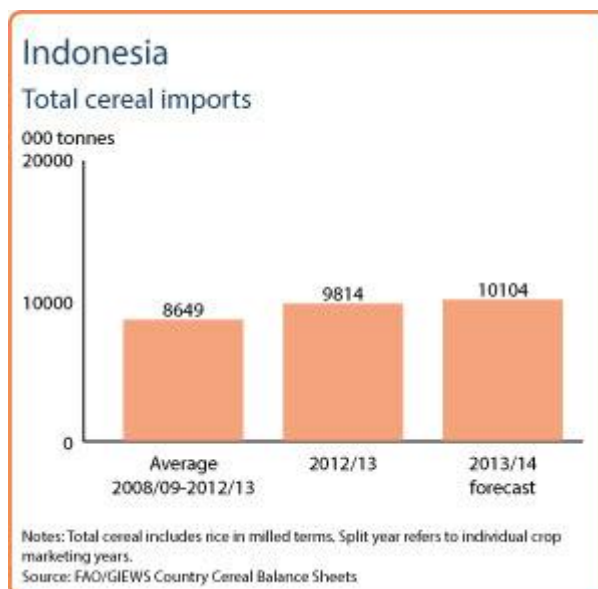
Harvesting of the 2012 maize crop was completed in early December. The 2012 aggregate maize output is estimated at 19 million tonnes, some 7 percent up on 2011, reflecting an expansion in the planted area, in response to increased seed and fertiliser subsidies through governmental programmes, coupled with favourable weather during the main season. Overall, the cereal output for 2012 is now revised to 88 million tonnes, 5.5 percent above the previous year.



Indonesia Cereal production

	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes		percent	
Rice (paddy)	65 199	69 045	72 100	4
Maize	17 776	18 962	18 250	-4
Others	0	0	0	0
Total	82 975	88 007	90 350	3

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



Higher cereal imports for current 2013/14 marketing year (April/March)

Indonesia is one of the biggest importers of wheat and for the 2013/14 marketing year (April/March) wheat imports are estimated to increase to 6.7 million tonnes, some 3 percent higher than a year ago, reflecting, in part, higher demand for the commodity.

Given a projected increase in 2013 paddy production, rice imports in 2013 are forecast at 1.3 million tonnes, some 28 percent below the estimated level in 2012 and much lower than the actual rice imports of 2.9 million tonnes in 2011. Imports of maize for the 2013/14 marketing year (April/March) are forecast at 2 million tonnes, compared to the estimated 1.4 million tonnes imported in 2012/13. The increase is mainly on account of an estimated reduction in 2013/14 maize harvest.

The total cereal import requirements for the 2013/14 marketing year (April/March) are thus forecast to increase to 10.1 million tonnes, 3 percent up on large purchases in the previous year and about 17 percent above the five-year average.

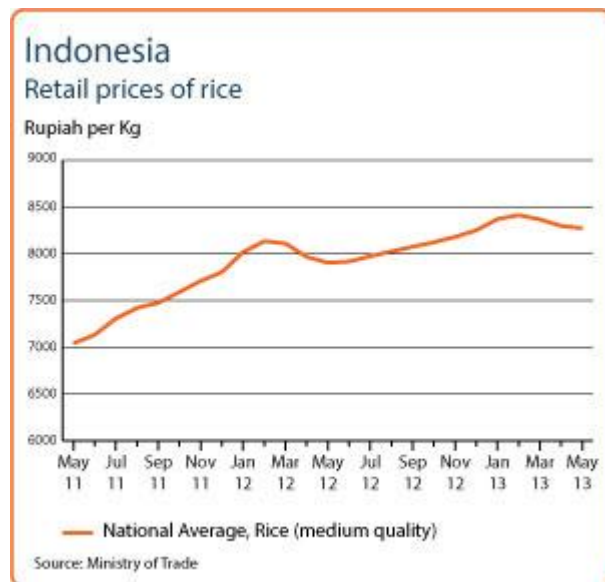
Domestic prices of rice weakened seasonally since March 2013

The average price of medium quality rice, which had increased steadily between May 2012 and February 2013, has been decreasing moderately since then, reflecting adequate supplies from the 2013 record main season harvest. Prices normally dip during March, April and May especially following a good harvest season. In May 2013, however, the nominal rice prices were slightly up on their levels a year earlier, in line with general inflation.

The year-on-year consumer price index (CPI) in May 2013 was recorded at 5.47 percent, slightly below the rate in April. The year-on-year food inflation reached 11.14 percent in May.

Overall food security situation satisfactory but localized food insecurity persists

In general, the food security situation in the country continues to be stable and satisfactory. However, access to food, remains a major challenge in the eastern parts of the country such as Nusa Tenggara Timur (NTT), Nusa Tenggara Barat (NTB) and Papua provinces. Furthermore, the floods between December 2012 and February 2013, affected over 250 000 people, damaged or destroyed houses, schools, infrastructure and roads.



Reference Date: 30-April-2013

FOOD SECURITY SNAPSHOT

- Prospects for the 2013 main season paddy and maize crops are favourable
- Domestic prices of rice weakened seasonally in March, after a steady rise since May 2012
- Lower cereal imports in 2012/13 (April/March) marketing year and are expected to remain so during 2013/14
- Overall food security situation satisfactory but localized food insecurity persists

Prospects for the 2013 main season paddy and maize crops are favourable

Harvesting of the 2013 main season paddy crop, which accounts for about 95 percent of total paddy production, began in early-March and is expected to continue until mid-June. Heavy downpours during December and March resulted in localised flooding causing some damage to cropped land, particularly in parts of Bojonegoro (north-eastern Java), Aceh Besar (northern Sumatra), West Sumbawa (western Sumbawa) and South Kalimantan. In spite of these localized adverse weather which caused moderate damage to paddy crop, the national paddy output is forecast to reach 72.1 million tonnes, some 4 percent above last year's record crop. The anticipated increase is mainly attributed to diverse initiatives launched by the government in order to achieve self-sufficiency target, as well as the expected increase in area planted to the crop.

The overall prospects for the 2013 main (rainy) season maize crop, currently being harvested, are also generally good and the 2013 maize production is preliminarily forecast at 19 million tonnes, similar to the 2012 record crop.

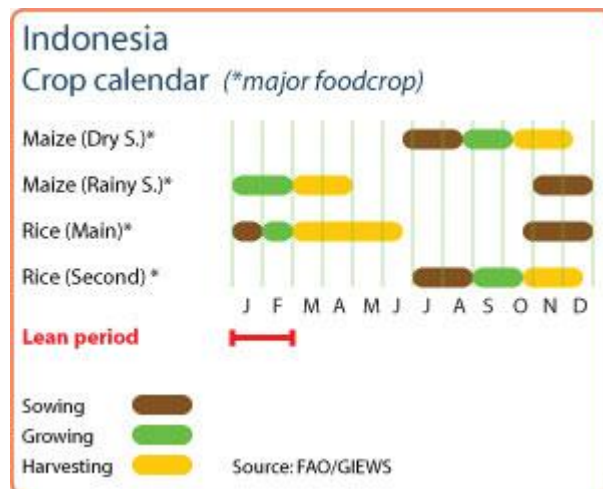
Record cereal production in 2012

The 2012 main paddy crop was harvested in June and that of the secondary crop was finalized by mid-December. The latest official estimate point to a record harvest of about 69 million tonnes (rice in paddy terms), showing an increase of some 5 percent from the 2011 above-average output. The increase is predominantly attributed to an expansion in the planted area in the Kalimantan region located in Borneo and generally favourable weather during the growing period.

Harvesting of the 2012 maize crop was completed in early December. The 2012 aggregate maize output is estimated at 19 million tonnes, some 7 percent up on 2011, reflecting an expansion in the planted area, in response to increased seed and fertiliser subsidies through governmental programmes, coupled with favourable weather during the main season. Overall, the cereal output for 2012 is now revised to 88 million tonnes, 5.5 percent above the previous year.

Lower cereal imports in 2012/13 marketing year and are expected to remain so during 2013/14

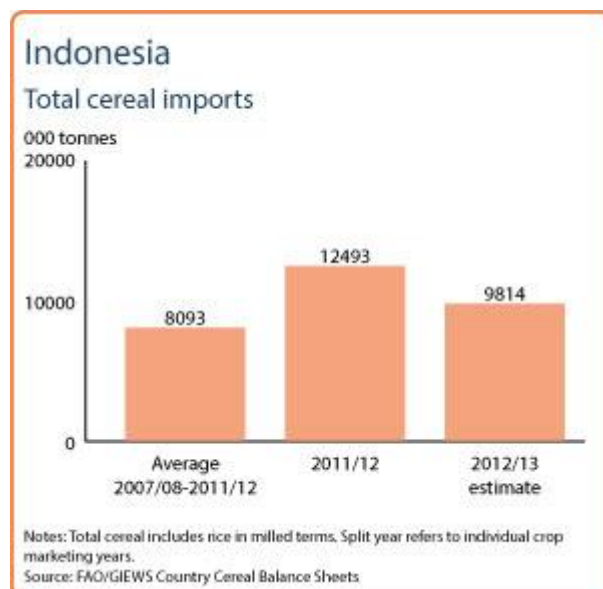
In response to the higher production levels in 2012, the cereal imports in the 2012/13 marketing year (April/March) are estimated to



Indonesia Cereal production

	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes			percent
Rice (paddy)	65 199	69 045	72 100	4
Maize	17 776	18 962	19 005	0
Others	0	0	0	0
Total	82 975	88 007	91 105	4

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



decline to 9.8 million tonnes, some 2.7 million tonnes less than the large purchases in the previous year, but about 21 percent above the five-year average. Indonesia is one of the biggest importers of wheat and for the 2012/13 marketing year wheat imports are estimated to increase to 6.5 million tonnes, reflecting, in part, higher demand for the commodity. Rice imports in 2013 are forecast at 1.3 million tonnes, almost 30 percent below the estimated level in 2012 and much lower than the actual rice imports of 2.9 million tonnes in 2011. Given the generally favourable rice and maize harvests, the total cereal imports during 2013/14 are preliminarily estimated to remain low at about 9.4 million tonnes.

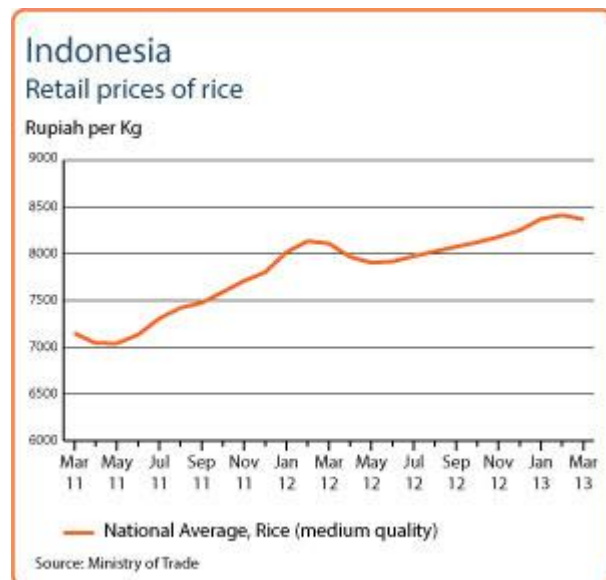
Domestic prices of rice weakened seasonally in March, after a steady rise since May 2012

The average prices for medium quality rice came down somewhat in March, after increasing in the last nine months and reaching record highs in February. The reversing trend mainly reflects early harvesting of the 2013 main season crops. Prices normally dip during March, April and May especially following a good harvest season. March 2013 price was 3.2 percent higher than the same month a year ago.

The year-on-year consumer price index (CPI) in March 2013 was recorded at 5.9 percent, slightly above the rate in February. While the year-on-year food inflation reached 13 percent in March.

Overall food security situation satisfactory but localized food insecurity persists

In general, the food security situation in the country continues to be stable and satisfactory. However, it remains a major challenge in the eastern parts of the country such as Nusa Tenggara Timur (NTT), Nusa Tenggara Barat (NTB) and Papua provinces. Furthermore, the recent floods, affected over 250 000 people, damaged or destroyed houses, schools, infrastructure and roads.



Reference Date: 10-January-2013

FOOD SECURITY SNAPSHOT

- Early prospects for the 2012/13 main season paddy crop are favourable
- Record cereal production in 2012
- Lower cereal imports in 2012/13 (April/March) marketing year
- Overall food security situation satisfactory but localized food insecurity persists

Early prospects for the 2012/13 main season paddy crop are favourable

Planting of the 2012/13 main season paddy crop, which accounts for about 95 percent of total paddy production, began in late-October and is expected to continue until the end of January. Over the main crop producing areas of Java and Sulawesi there were generally below average rains between November and mid-December. The rains picked-up in late December. During the first week of January localised heavy downpours in parts of Bojonegoro in north-eastern Java, Aceh Besar in northern Sumatra and West Sumbawa in western Sumbawa resulted in localized flooding causing some damage to crop land. The remotely sensed data, as of the first dekad of January 2013, confirms generally satisfactory vegetation conditions in much of the country. Early official targets indicate that the aggregate paddy crop is expected to reach 72 million tonnes, some 4.5 percent above last year's record crop. The anticipated increase is mainly attributed to diverse initiatives launched by the government in order to achieve self-sufficiency target, as well as the expected increase in area planted to the crop.

Record cereal production in 2012

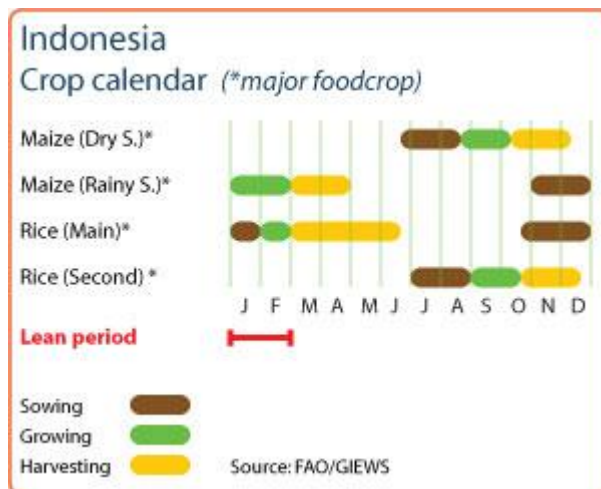
The 2012 main paddy crop was harvested in June and of the secondary crop was finalised by mid-December. The latest official estimate point to a record harvest of about 69 million tonnes (rice in paddy terms), showing an increase of some 5 percent from the 2011 above-average output. The increase is predominantly attributed to an expansion in the planted area in the Kalimantan region located in Borneo and generally favourable weather during the growing period.

Harvesting of the 2012 maize crop was completed in early December. The 2012 aggregate maize output, is set at 19 million tonnes, some 7 percent up on 2011, reflecting an expansion in the planted area, in response to increased seed and fertiliser subsidies through governmental programmes, coupled with favourable weather during the main season. Overall, the cereal output for 2012 is estimated at 87.9 million tonnes, 5.4 percent above the previous year.

The year-on-year consumer price index (CPI) in December 2012 was recorded at 4.3 percent, slightly below the rate in November. While the year-on-year food inflation reached 5.7 percent in December. Staple food prices have remained generally stable since mid-2011.

Lower cereal imports in 2012/13 marketing year

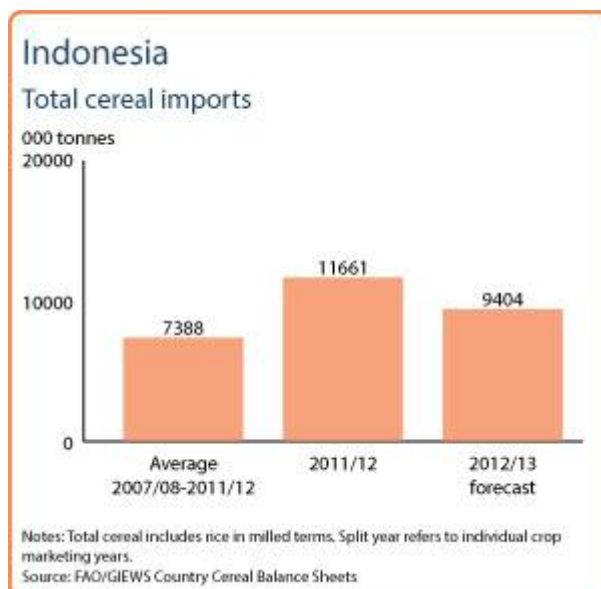
In response to the higher production levels in 2012, the cereal import



Indonesia Cereal production

	2007-2011 average	2011	2012 estimate	change 2012/2011
	000 tonnes			percent
Rice (paddy)	62 822	65 757	68 956	5
Maize	16 641	17 643	18 962	7
Others	0	0	0	0
Total	79 463	83 400	87 918	5

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



requirements in the 2012/13 marketing year (April/March) are forecast to decline to 9.4 million tonnes, some 2.3 million tonnes less than the large purchases in the previous year, but about 27 percent above the five-year average. Indonesia is one of the biggest importers of wheat and for the 2012/13 marketing year wheat imports are expected to increase to 6.5 million tonnes, reflecting, in part, higher demand for the commodity. Import requirements for rice in 2013 are forecast at 1.5 million tonnes, similar to the estimated level in 2012. These are much lower than the actual rice imports of 2.8 million tonnes in 2011.

Overall food security situation satisfactory but localized food insecurity persists

In general, the food security situation in the country continues to be stable and satisfactory. However, it remains a major challenge in the eastern parts of the country such as Nusa Tenggara Timur (NTT), Nusa Tenggara Barat (NTB) and Papua provinces, where up to nearly 40 percent of the local population is estimated to be below national poverty line. The most vulnerable to food insecurity are the families engaged in agriculture.

Reference Date: 24-July-2012

FOOD SECURITY SNAPSHOT

- Early prospects for the 2012 main season paddy and maize crops are favourable
- Lower cereal imports in 2012/13 marketing year
- Rice prices remain at high levels, despite seasonable declines
- Overall food security situation satisfactory but localized food insecurity persists

Early prospects for the 2012 main season paddy and maize crops are favourable

Harvesting of the 2012 main season paddy crop, which accounts for about 90 percent of total paddy area and almost 95 percent of aggregate paddy production, was completed in June. In the large crop producing areas of Java, Sumatra and Sulawesi, which collectively contribute to over 89 percent of the national rice output, rains have been generally beneficial for crop development during the growing season.

Planting of the 2012 secondary season paddy crop is currently underway and will continue into August.

Early official forecasts point to a record harvest of about 68 million tonnes, showing an increase of some 3 percent from the 2011 above-average output. This is predominantly attributed to an expansion in the planted area in the Kalimantan region located in Borneo, generally favourable rainfall as well as governmental decision to increase the procurement price for the crop.

Harvesting of the 2012 main season maize crop was completed in April and sowing of the 2012 secondary (dry) season maize crop is ongoing.

The 2012 aggregate maize output is forecast to increase significantly to a record level of about 24 million tonnes or 36 percent above the 2011 harvest.

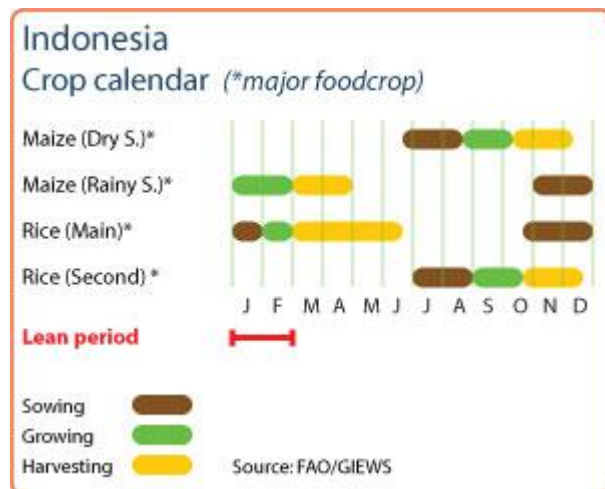
The increase reflects an expansion in the planted area, in response to increased seed and fertiliser subsidies through governmental programmes, coupled with favourable weather during the main season.

2011 cereal harvest slightly below the 2010 production

The 2011 aggregate cereal output is set at 83.4 million tonnes, a 1.6 percent contraction from 2010 level, reflecting the negative impact of a late start of the season as well as pests and crop diseases in parts.

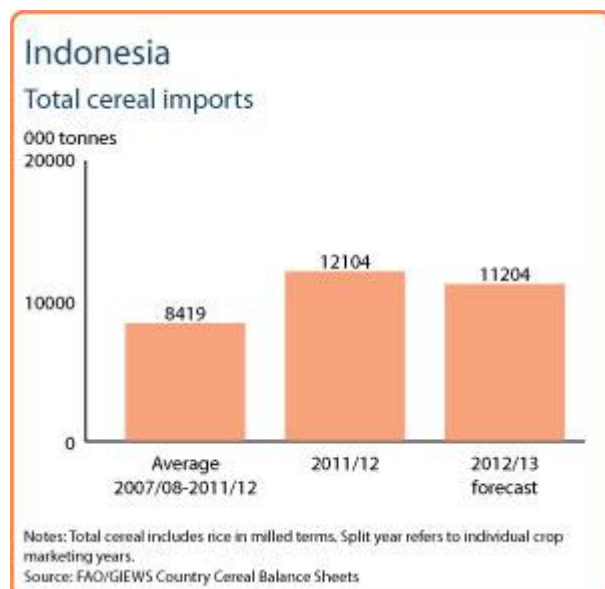
Lower cereal imports in 2012/13 marketing year

Indonesia is one of the biggest importers of wheat and for the 2012/13 is forecast about 7.8 million tonnes, some 5.4 percent higher



	2007-2011 average	2011	2012 forecast	change 2012/2011
	000 tonnes			percent
Rice (paddy)	62 818	65 741	68 000	3
Maize	16 638	17 629	24 000	36
Others	0	0	0	0
Total	79 457	83 370	92 000	10

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



than a year ago, due to the increased demand from wheat industry.

Given an estimated increase in 2012/13 paddy production, the country's 2012/13 rice imports are projected at 1.8 million tonnes, a decrease of 1 million tonnes compared to the level of 2011/12.

The total cereal import requirements for the marketing year 2012/13 (April/March) are thus forecast to decline to 11.2 million tonnes, some 900 000 tonnes less than the large purchases in the previous year.

Rice prices remain at high levels, despite seasonable declines

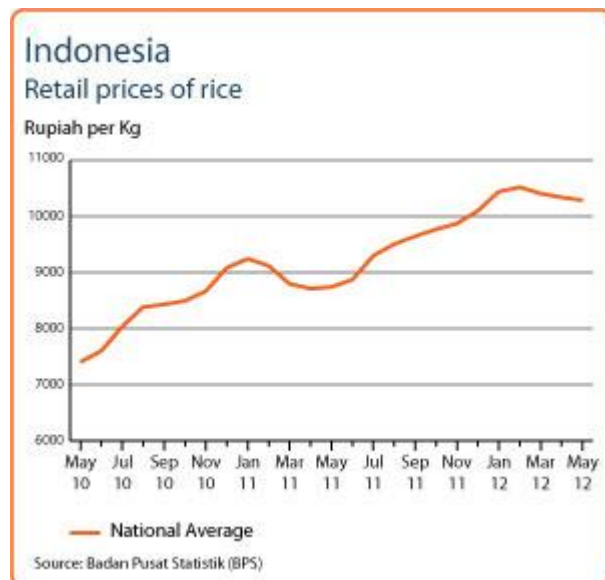
In Indonesia the average price for rice, which had increased steadily over the last three years, has been decreasing since March 2012, reflecting adequate supplies from the 2012 record main season harvest. In May 2012, it averaged IDR 10 286 (about 1.09 USD) per Kg, which is, however, some 17.7 percent higher compared to the same month of the last year.

The latest available official data indicate that the general annual consumer price inflation (CPI) increased to 4.53 percent in June 2012 from 4.45 percent in May 2012, on account of higher basic food prices.

According to the National Statistical Agency (Badan Pusat Statistik), the country experienced a growth in GDP of 6.3 percent in the first quarter of 2012, down slightly from 6.5 percent in 2011 as a whole.

Overall food security situation satisfactory but localized food insecurity persists

In general, the food security situation in the country continues to be stable and satisfactory. However, it remains a major challenge in the eastern parts of the country such as Nusa Tenggara Timur (NTT), Nusa Tenggara Barat (NTB) and Papua provinces, where up to nearly 40 percent of the local population is estimated to be below national poverty line. The most vulnerable to food insecurity are the population engaged in agriculture.



Reference Date: 13-February-2012

FOOD SECURITY SNAPSHOT

- Good rains favour the current cropping season
- 2011 paddy harvest estimated to decline slightly from a record production in 2010
- Price of rice has been rising in the last several months reaching new record level in January
- Overall food security situation satisfactory but localized food insecurity persists

Good rains favour the current cropping season

Currently the 2012 country's main crop, *Main* season paddy planted during late October to January and maize crop planted during November to December are growing under normal conditions. The main (wet) season paddy crop in Indonesia accounts for almost 95 percent of the annual production coming from about 90 percent of the area harvested.

2011 paddy harvest estimated to decline slightly from a record production in 2010

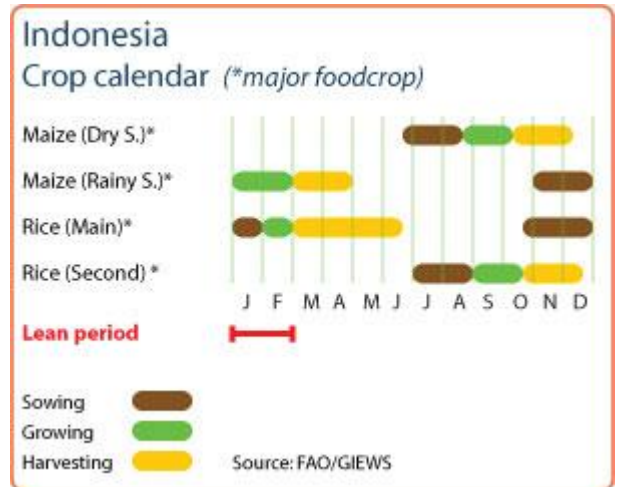
The official estimate of the 2011 harvest of paddy rice, the main staple crop is set at 65.4 million tonnes (equivalent to 41.2 million tonnes of milled rice). The authorities lowered the rice production forecast, which now points to a 1.6 percent contraction, reflecting the negative impact of a late start of the season, wetter than normal conditions during the development of the main crop, subsequent drought and pest and disease problems during the secondary (dry) season. The maize crop production for 2011 is officially estimated at 17.2 million tonnes, 6 percent below the record level harvest a year ago.

Given the decline in last year's paddy production, the country's 2011/12 rice imports are estimated at 2 million tonnes, twice the level of 2010/11. The total cereal imports are thus estimated to increase to 9.6 million tonnes for the 2011/12 marketing year (April/March). Indonesia is one of the biggest importers of wheat and the amount for 2011/12 is set at about 5.5 million tonnes, same as the level a year before. The annual cereal imports have picked up for the last two years after a steady decline during the previous three years.

Price of rice has been rising in the last several months reaching a new record level in January

In Indonesia, price of rice has been rising since May 2011. In January 2012, it reached a new record level averaging IDR 10 439 (about 1.10 USD) per Kg, some 13 percent higher than a year earlier.

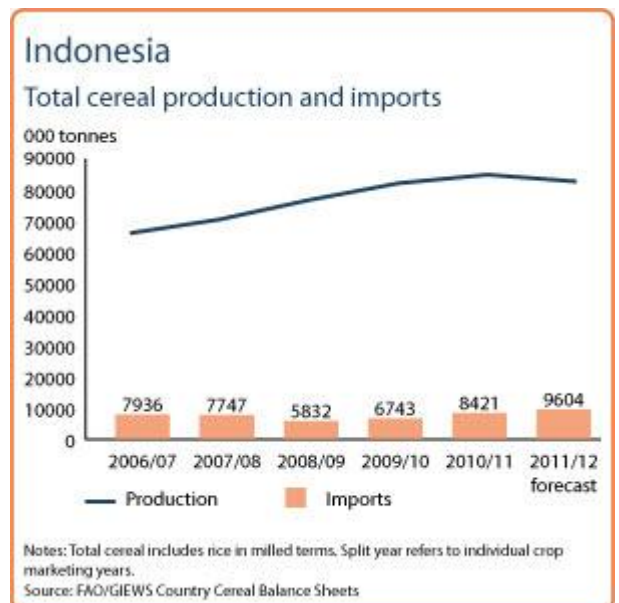
In December 2011, the official statistics agency (BPS) estimated the year-on-year food price inflation at 3.6 percent. The latest available official data indicate that the general annual consumer price inflation decreased to 3.79 percent in December 2011 from 4.15 percent in November 2011.



Indonesia Cereal production

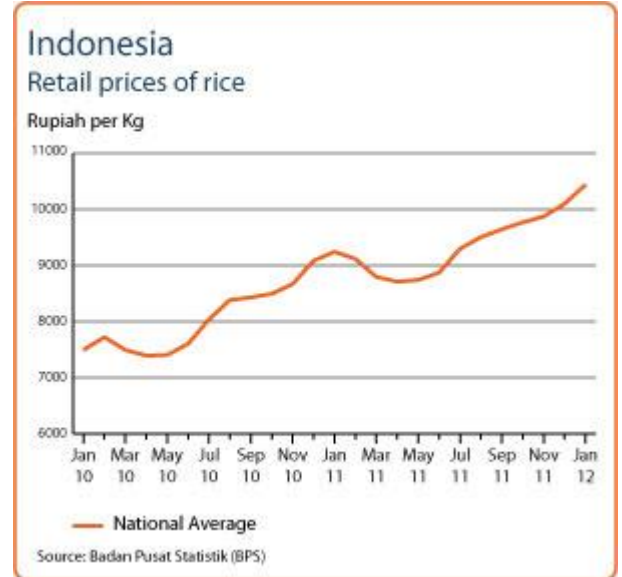
	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes			percent
Rice (paddy)	60 561	66 469	65 385	-2
Maize	15 435	18 328	17 230	-6
Others	0	0	0	0
Total	75 996	84 797	82 615	-3

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



Overall food security situation satisfactory but localized food insecurity persists

In general, the food security situation in the country continues to be stable and satisfactory. However, it remains a major challenge in the eastern parts of the country such as East Nusa Tenggara (NTT), West Nusa Tenggara (NTB) and Papua provinces, where up to nearly 40 percent of the local population is estimated to be below national poverty line. The most vulnerable to food insecurity are the population engaged in agriculture.



Reference Date: 15-December-2011

FOOD SECURITY SNAPSHOT

- 2011 paddy harvest estimated to decline slightly from a record production in 2010
- Price of rice has been rising in the last several months reaching new record level in October
- Overall food security situation satisfactory but localized food insecurity persists

2011 paddy harvest estimated to decline slightly from a record production in 2010

The official estimate of the 2011 harvest of paddy rice, the main staple crop is set at 65.4 million tonnes (equivalent to 41.2 million tonnes of milled rice). The authorities lowered their rice production forecast, which now points to a 1.6 percent contraction, reflecting the negative impact of a late start of the season, wetter than normal conditions during the development of the main crop, subsequent drought and pest and disease problems during the secondary (dry) season. The maize crop production for 2011 was officially estimated at 17.2 million tonnes, 6 percent below the record level harvest a year ago.

Sowing of the main season paddy and rainy maize crops is currently underway. The main (wet) season paddy crop in Indonesia accounts for almost 95 percent of the annual production coming from about 90 percent of the area harvested.

Given the anticipated decline in this year's paddy production, the country is forecast to import 2 million tonnes of rice in 2011, twice the level of 2010. The total cereal imports are thus expected to increase to 9.6 million tonnes for the 2011/12 marketing year (Apr./Mar.). Indonesia is one of the biggest importers of wheat and the forecast amount for 2011/12 is set at about 5.5 million tonnes, same as the level a year before. The annual cereal imports have picked up for the last two years after a steady decline during the previous three years.

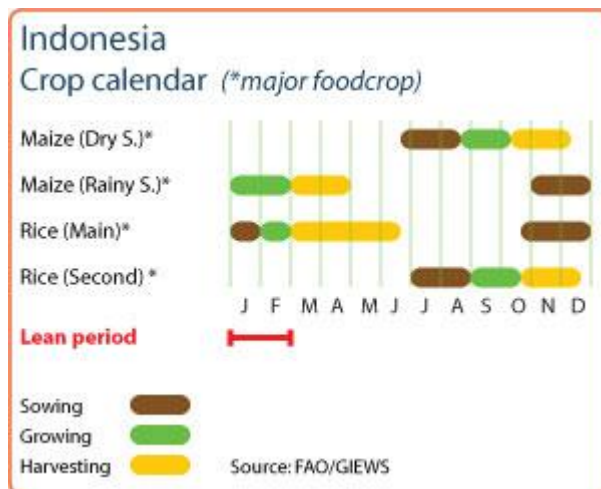
Price of rice has been rising in the last several months reaching a new record level in October

In Indonesia, price of rice has been rising since May of this year. In October 2011, it reached a new record level averaging IDR 9 768 (about 1.10 USD) per Kg, some 15 percent higher than a year earlier.

In October 2011, the official statistics agency (BPS) estimated the year-on-year food price inflation at 5.81 percent. The latest available official data indicate that the general annual consumer price inflation decreased to 4.15 percent in November 2011 from 4.42 percent in October 2011.

Overall food security situation satisfactory but localized food insecurity persists

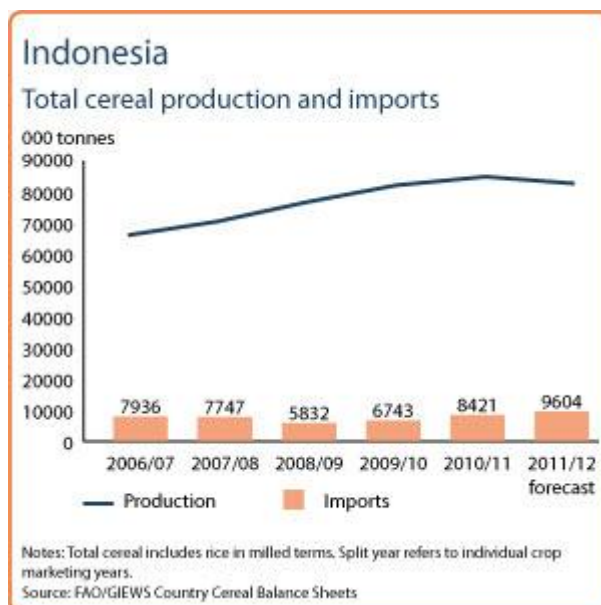
In general, the food security situation in the country continues to be stable and satisfactory. However, it remains a major challenge in the eastern parts of the country such as East Nusa Tenggara (NTT),



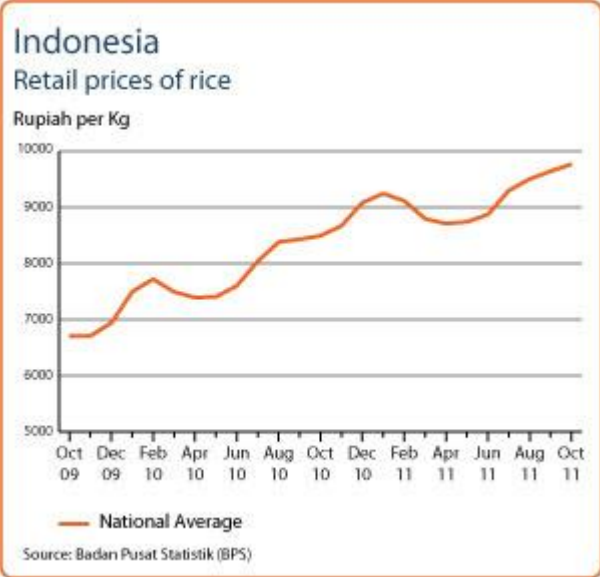
Indonesia Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes		percent	
Rice (paddy)	60 561	66 469	65 385	-2
Maize	15 435	18 328	17 230	-6
Others	0	0	0	0
Total	75 996	84 797	82 615	-3

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



West Nusa Tenggara (NTB) and Papua provinces, where up to nearly 40 percent of the local population is estimated to be below national poverty line. The most vulnerable to food insecurity are the population engaged in agriculture.



Reference Date: 30-May-2011

FOOD SECURITY SNAPSHOT

- Early estimates of 2011 main season paddy harvest show some improvement in production
- Rice prices which had risen significantly came down in the past three months
- Food security situation is generally good

Good 2011 main season paddy harvest, following the record production in 2010

Harvesting of the main season paddy and maize crops is currently underway. Early estimate of total annual paddy production in 2011 at 67.3 million tonnes shows one percent increase over the record harvest of 2010. The rainfall during the season has been relatively normal to above normal. The wet season paddy crop in Indonesia accounts for almost 95 percent of the annual production coming from about 90 percent of the area harvested.

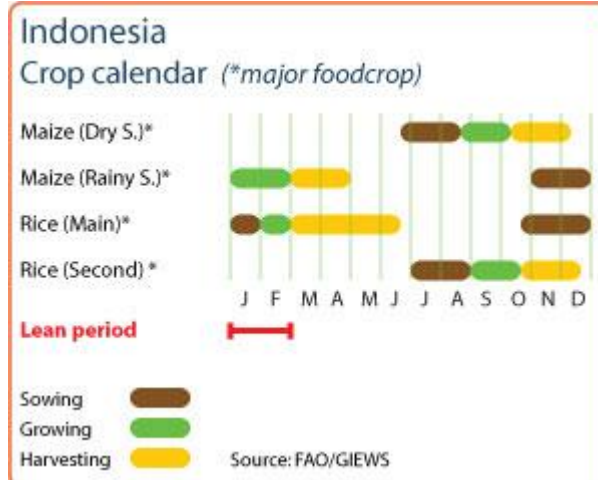
In 2010, with bumper harvests of paddy from the main (wet) season in March-June and smaller secondary harvest in November-December, the annual production is officially estimated at a record level of 66.4 million tonnes, slightly above the 2009 previous record output. In spite of the good national crop outlook, however, regional anomalies existed due to floods which caused serious damage in Lampung, southeast on the Island of Sumatra in February and a prolonged drought in NTT (Nusa Tenaggarra Timur) in the east-central Island which devastated crops.

The maize crop production for 2010 is also estimated at another record level of about 18.4 million tonnes. With this output the country now is a net exporter of maize but one of the biggest importers of wheat. Wheat is not produced in the country. The forecast amount for 2011/12 is set at about 5.5 million tonnes, same as the level a year before. The annual cereal imports have picked up for the last two years after a steady decline during the previous three years.

Rice prices which have been soaring in last few months came down in the past three months

In Indonesia, price of rice has come down from February to April 2011 as the country recently reached new deals with Thailand and Viet Nam to import more rice as to increase rice stocks and to stabilize prices. The country has also announced in January that import duties on rice, soybeans and wheat will be suspended. Rice prices that had reached a new record level in January 2011 averaging IDR 9244 (about USD 1) per Kg, were quoted at IDR 8711 in April, a decline of 6 percent but still 18 percent higher than a year earlier.

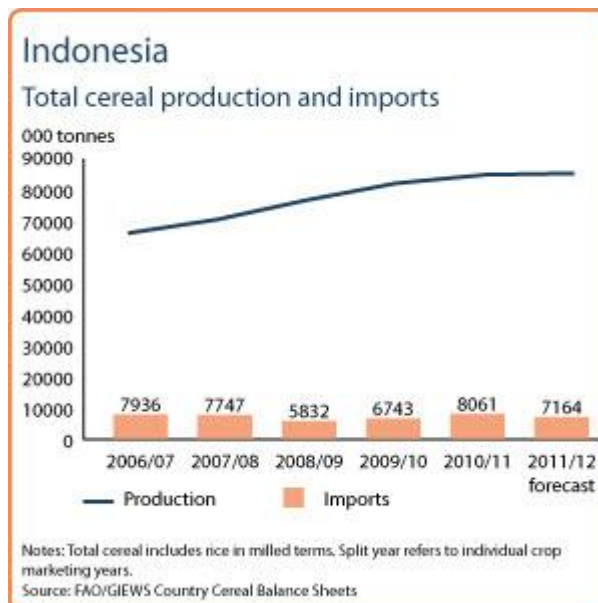
The year-on-year food price inflation in January 2011 estimated by the official statistics agency (BPS) currently has picked up pace as it stood at 16.187 percent as opposed to 7.02 percent for general consumer price inflation during the same period.



Indonesia Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes			percent
Rice (paddy)	60 550	66 412	67 307	1
Maize	15 442	18 364	17 925	-2
Wheat	0	0	0	0
Others	0	0	0	0
Total	75 992	84 776	85 232	1

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



The overall food security situation in the country continues to be stable and satisfactory.



Reference Date: 15-April-2011

FOOD SECURITY SNAPSHOT

- Prospects for 2011 main season paddy harvest are favourable
- Rice prices have been soaring in last months
- Food security situation is generally good

Prospects for 2011 main season paddy harvest, following the record production in 2010, are favourable

Currently the main season paddy and maize crops are growing under normal to above normal rainfall conditions. The prospects for the harvests which will begin next month are considered favourable. Wet season paddy crop in Indonesia accounts for almost 95 percent of the annual production coming from about 90 percent of the area harvested.

In 2010, with bumper harvests of paddy from the main (wet) season in March-June and smaller secondary harvest in November-December, the annual production is officially estimated at a record level of 66.4 million tonnes, slightly above the 2009 previous record output. In spite of the good national crop outlook, however, regional anomalies existed due to floods which caused serious damage in Lampung, southeast on the Island of Sumatra in February and a prolonged drought in NTT (Nusa Tenaggarra Timur) in the east-central Island which devastated crops.

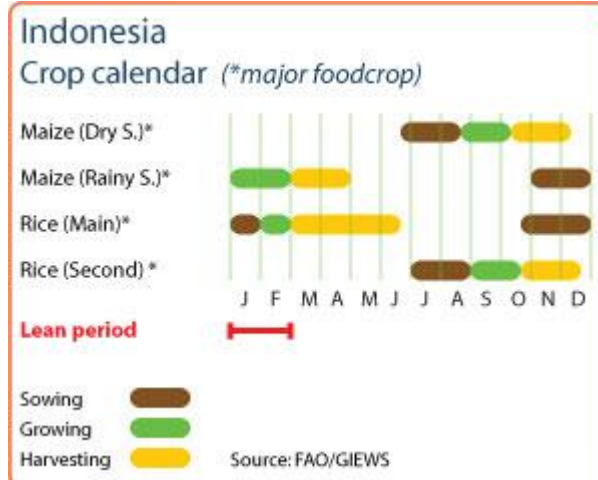
The maize crop production for 2010 is also estimated at another record level of about 18.4 million tonnes. The 2009 maize production was also estimated at a bumper level of 17.6 million tonnes. With this output the country now is a net exporter of maize but one of the biggest importers of wheat. Wheat is not produced in the country; hence, forecast amount for 2010/11 is set at about 5.5 million tonnes, slightly above the level year before. The annual cereal imports have picked up for the last two years after a steady decline during the previous three years.

Rice prices have been soaring in last few months

In Indonesia, price of rice reached a new record level in January 2011 averaging IDR 9244 (about USD 1) per Kg, which is 23 percent higher than a year earlier or 40 percent higher than two years before. Indonesia recently reached new deals with Thailand and Viet Nam to import more rice as to increase rice stocks and to stabilize prices. The country has also announced in January that import duties on rice, soybeans and wheat will be suspended.

The year-on-year food price inflation in January 2011 estimated by the official statistics agency (BPS) currently has picked up pace as it stood at 16.187 percent as opposed to 7.02 percent for general consumer price inflation during the same period.

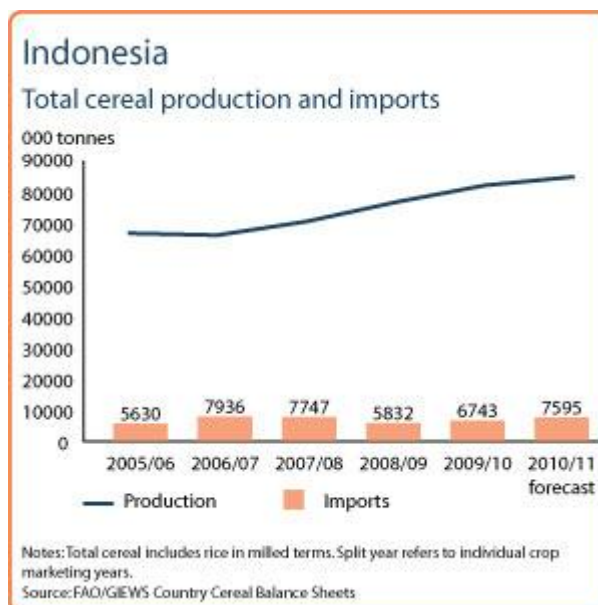
The overall food security situation in the country continues to be stable and satisfactory.



Indonesia Cereal production

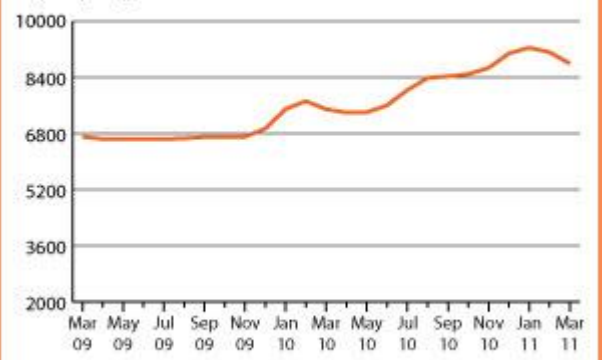
	2005-2009 average	2009	2010 estimate	change 2010/2009
	000 tonnes			percent
Rice (paddy)	58098	64399	66412	3
Maize	14274	17630	18364	4
Rye	3	0	0	0
Others	0	0	0	0
Total	72374	82029	84776	3

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



Indonesia Retail prices of rice

Rupiah per kg



Source: Badan Pusat Statistik (BPS)

Reference Date: 11-February-2011

FOOD SECURITY SNAPSHOT

- Prospects for 2011 main season paddy harvest are favourable.
- Rice prices have been soaring in last months.
- Food security situation is generally good.

Prospects for 2011 main season paddy harvest, following the record production in 2010, are favourable

Currently the main season paddy and maize crops are growing under normal to above normal rainfall conditions. The prospects for the harvests which will begin next month are considered favourable. Wet season paddy crop in Indonesia accounts for almost 95 percent of the annual production coming from about 90 percent of the area harvested.

In 2010, with bumper harvests of paddy from the main (wet) season in March-June and smaller secondary harvest in November-December, the annual production is officially estimated at a record level of 65.98 million tonnes, slightly above the 2009 previous record output. In spite of the good national crop outlook, however, regional anomalies existed due to floods which caused serious damage in Lampung, southeast on the Island of Sumatra in February and a prolonged drought in NTT (Nusa Tenaggarra Timur) in the east-central Island which devastated crops.

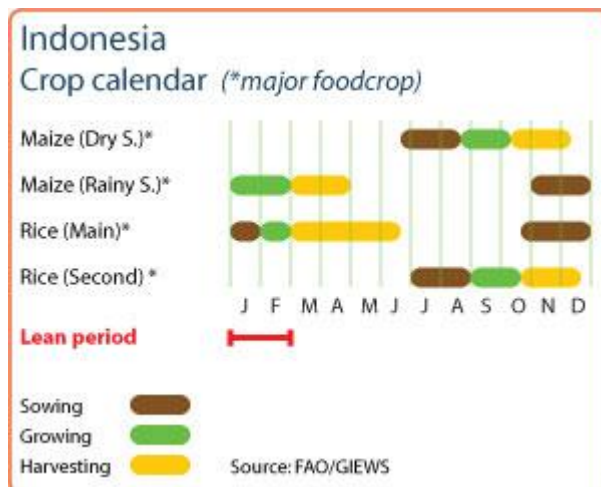
The maize crop production for 2010 is also estimated at another record level of about 17.8 million tonnes. The 2009 maize production was also estimated at a bumper level of 16.5 million tonnes. With this output the country now is a net exporter of maize but one of the biggest importers of wheat. Wheat is not produced in the country, hence, forecast amount for 2010/11 is set at about 5.5 million tonnes, slightly above the level year before. The annual cereal imports have picked up for the last two years after a steady decline during the previous 3 years.

Rice prices have been soaring in last few months

In Indonesia, price of rice reached a new record level in January 2011 averaging IDR 9244 (about 1 USD) per Kg, which is 23 percent higher than a year earlier or 40 percent higher than two years before. Indonesia recently reached new deals with Thailand and Viet Nam to import more rice as to increase rice stocks and to stabilize prices. The country has also announced in January that import duties on rice, soybeans and wheat will be suspended.

The year-on-year food price inflation in January 2011 estimated by the official statistics agency (BPS) currently has picked up pace as it stood at 16.187 percent as opposed to 7.02 percent for general consumer price inflation during the same period.

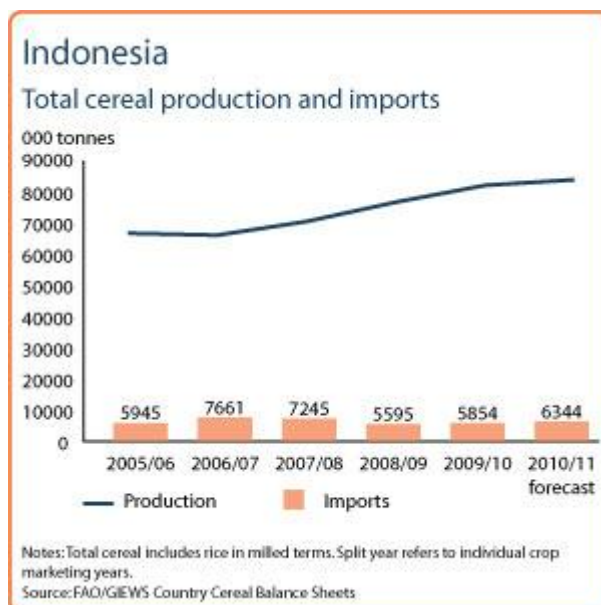
The overall food security situation in the country continues to be stable and satisfactory.



Indonesia Cereal production

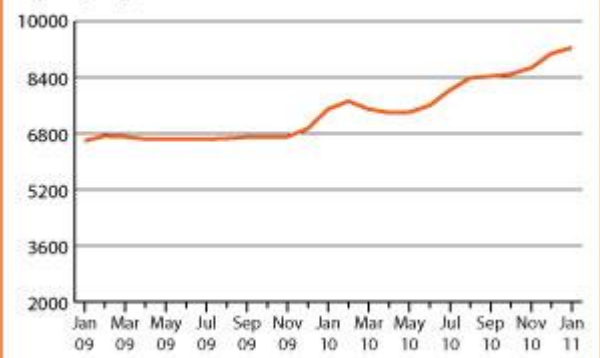
	2005-2009 average	2009	2010 estimate	change 2010/2009
	'000 tonnes			percent
Rice (paddy)	58098	64399	65981	2
Maize	14274	17630	17845	1
Rye	3	0	0	0
Others	0	0	0	0
Total	72374	82029	83825	2

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



Indonesia Retail prices of rice

Rupiah per kg



Source: Badan Pusat Statistik (BPS)

Reference Date: 03-September-2010

FOOD SECURITY SNAPSHOT

- A bumper harvest of the 2010 main season rice paddy leads to an estimated record level of 2010 production
- With the bumper cereal harvest the country is virtually self-sufficient in rice and maize.
- Food security situation is generally good with adequate domestic cereal supplies.

A bumper harvest of the 2010 main season rice paddy leads to an estimated record level of 2010 aggregate paddy production

The main (wet) season paddy harvest, which began in March and continued up to June, is estimated to lead to aggregate 2010 paddy production at a record level of 65.5 million tonnes, slightly above the 2009 previous record output. Wet season paddy crop in Indonesia accounts for almost 95 percent of the annual production coming from about 90 percent of the area harvested. In spite of the good national crop outlook, however, regional anomalies exist due to floods which caused serious damage in Lampung, southeast on the Island of Sumatra in February and a prolonged drought in NTT (Nusa Tenaggarra Timur) in the east-central Island which devastated crops.

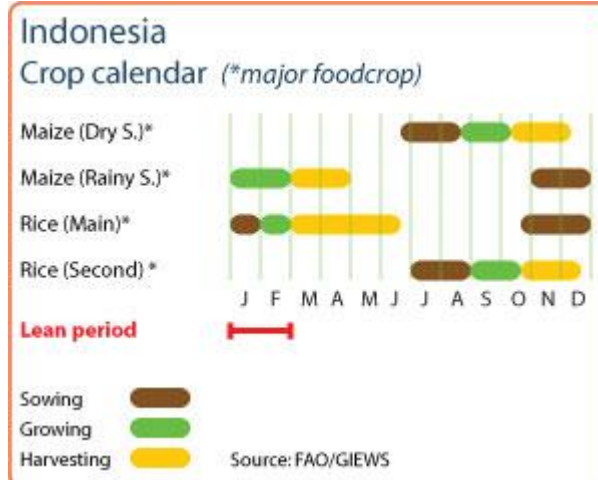
The maize crop production for 2010 is also estimated at another record level of about 18 million tonnes. The 2009 maize production was also estimated at a bumper level of 16.5 million tonnes.

The country is self-sufficient in rice and maize

With this output the country now is virtually self-sufficient in rice and maize. Wheat is not produced in Indonesia and its import in 2009/10 (Apr./Mar.) is estimated at about 5.4 million tonnes and about the same forecast amount for 2010/11. The annual cereal imports have been slowly declining over the past few years.

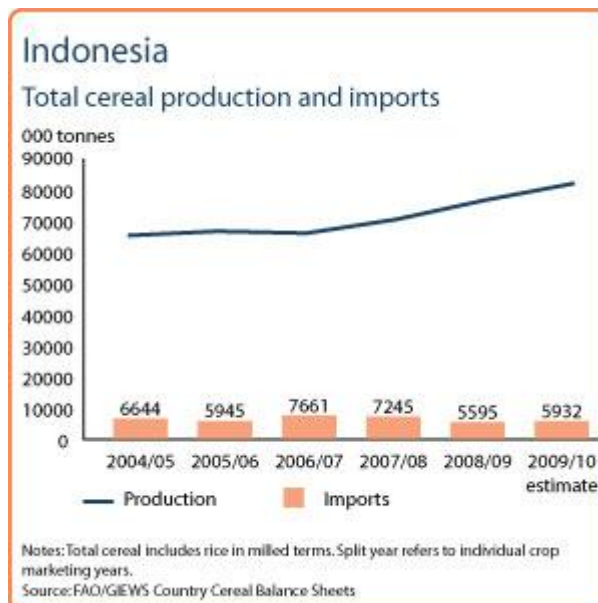
Food supply situation in the country is satisfactory

The overall food security situation in the country continues to be stable and satisfactory. The food price inflation estimated by the official statistics agency (BPS) currently has picked up pace as it stood at 11.27 percent for January-August 2010 (for 8 months) as opposed to 4.82 percent for general consumer price inflation during the same period. The average annual food price inflation 2009 was estimated at 3.88 percent. Inflation has steadily come down from a high of 15 percent in November 2008 to a low of 5 percent in November 2009. The retail prices of rice, the main staple, in general have remained stable due to the successive bumper harvests and government subsidy programmes.



	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Rice (paddy)	58098	64399	65151	1
Maize	14274	17630	18016	2
Rye	3	0	0	0
Others	0	0	0	0
Total	72374	82029	83167	1

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



Reference Date: 01 April 2010

FOOD SECURITY SNAPSHOT

- The main season paddy harvest to be gathered from March to June 2010 is considered to be very favourable.
- With the bumper cereal harvest the country is virtually self-sufficient in rice and maize.
- Food security situation is generally good with adequate domestic cereal supplies and relatively stable prices in the country.

2010 main season rice paddy harvest is anticipated to be favourable

The main (wet) season paddy harvest, which began in March and will continue up to June, is preliminarily forecast at a record level of 61.6 million tonnes, slightly above the 2009 main season previous record output. Wet season paddy crop in Indonesia accounts for almost 95 percent of the annual production coming from about 90 percent of the area harvested. In spite of the good national crop outlook, however, regional anomalies exist due to floods which caused serious damage in Lampung, southeast on the Island of Sumatra in February and a prolonged drought in NTT (Nusa Tenaggarra Timur) in the east-central Island which devastated crops.

The first official forecast of maize crop currently being harvested points to another record level of about 18 million tonnes. The 2009 maize production was also estimated at a bumper level of 16.5 million tonnes.

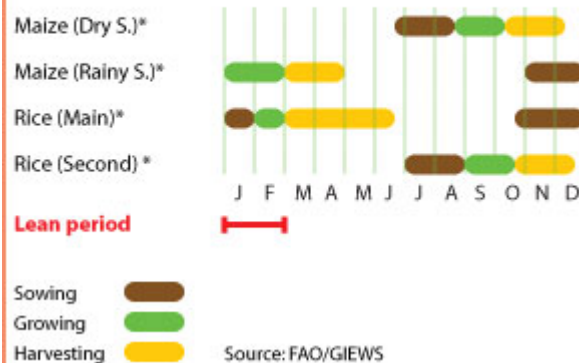
The country is self-sufficient in rice and maize

With this output the country now is virtually self-sufficient in rice and maize. Wheat is not produced in Indonesia and its import in 2009/10 (Apr./Mar.) is estimated at about 5.3 million tonnes. The annual cereal imports have been slowly declining over the past few years.

Food supply situation in the country is satisfactory

The overall food security situation in the country continues to be stable and satisfactory. The average annual consumer price inflation estimated by the official statistics agency (BPS) has steadily come down from a high of 15 percent in November 2008 to a low of 5 percent in November 2009. Since then, the inflation has inched up and was estimated at 6.1 percent in January and February 2010. The retail prices of rice, the main staple, in general have remained stable due to the successive bumper harvests and government subsidy programmes.

Indonesia Crop calendar (*major foodcrop)

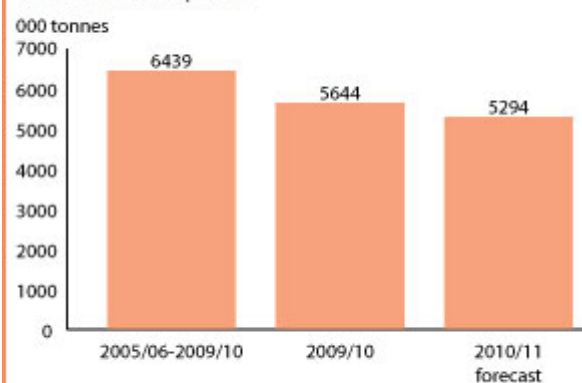


Indonesia Cereal production

	2004-2008	2008	2009	change
	average		estimate	2009/2008
000 tonnes				
Rice (paddy)	56036	60326	64329	7
Maize	12325	13883	16478	19
Rye	2	0	0	0
Others	0	0	0	0
Total	68363	74209	80807	9

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

Indonesia 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

Reference Date: 07-January-2010

FOOD SECURITY SNAPSHOT

- The combined harvest of the main and the secondary season rice in 2009 is estimated at a record level of over 40 million tonnes.
- With the bumper cereal harvest the country has a net surplus in rice and maize and could become a net exporter this year.
- Food security situation is generally good with adequate domestic cereal supplies and relatively stable prices in the country.

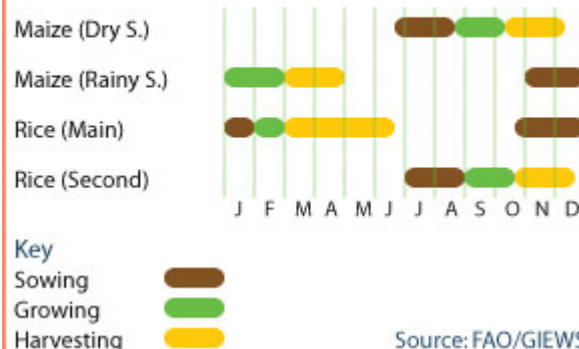
2009 rice paddy harvest is estimated at a record level

The official estimate of the 2009 harvest of rice, the main staple crop, in paddy terms is at a record level of 63.84 million tonnes (40.22 million tonnes of milled rice). This output is an increase of about 5 percent over the previous year's bumper harvest. The 2009 harvest was improved due increases in both area and yields as a response to high rice prices. With this output the country now has a net surplus of rice and could possibly export some 500 000 tonnes to take advantage of high international prices. The 2009 maize output is estimated at a record of 17.66 million tonnes; this is expected to be more than the consumption requirement. Wheat is not produced in Indonesia and its import in 2009/10 (Apr./Mar.) is forecast at about 5.3 million tonnes.

Food supply situation in the country is satisfactory

The overall food security situation in the country continues to be stable and satisfactory. The average consumer price inflation in 2009, according to the official statistics agency (BPS), estimated at 2.78 percent is the lowest in 9 years. The retail prices of rice, the main staple, in general have remained stable due to the successive bumper harvests and government subsidy programmes.

Crop calendar Indonesia



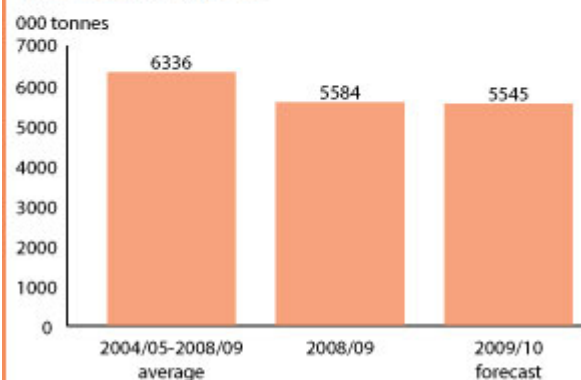
Indonesia

Cereal production

	2004-2008 average	2008	2009 forecast	change 2009/2008
	000 tonnes			percent
Rice (in milled terms)	35302	38005	40219	6
Maize	12993	16317	17660	8
Rye	3	0	0	0
Others	0	0	0	0
Total	48298	54323	57879	7

Note: percentage change calculated from unrounded data.

Total Cereals imports



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

Source: FAO/GIEWS Country Cereal Balance Sheets