

Food Security Bulletin

Edition no. 20: October - December 2020

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Highlights

- Rice availability (Imports and local production) is sufficient to support local demand.
- Price index for local rice has been on an upward trend for most part of 2020.
- Vegetation Health Index is in the green to old green category in most parts of the country in December 2020, a situation that is favourable for agriculture production.

Background and Context

The year 2020 will go down in history as one that disrupted and exacerbated an already fragile global food system leading to job losses, hunger and malnutrition due to the COVID-19 pandemic. This fragility presents an increased risk to food sufficiency in Timor-Leste, where up to 40 percent of cereal consumption¹ are met through imports.

In the last quarter of 2020, the Government rolled out a social protection and economic recovery initiative 'Cesta Basica' targeting the entire population through provision of food and nonfood items.

Based on the agricultural seasonal calendar, the last quarter of 2020 is traditionally used for land preparation and planting of key staple food crops. With the current rainy season under-way, the first harvest is expected around April/May 2021.

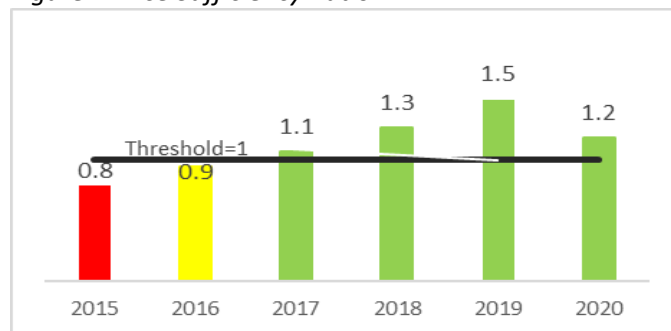
Methodology

This Food Security Bulletin (FSB) is based on data emanating from institutions under the KONSSANTIL (Inter-Minister Council for Food Security, Food Sovereignty and Nutrition). The FSB is a product of the Ministry of Agriculture and Fisheries (MAF) as the lead and secretariate of KONSSANTIL with technical support from WFP and FAO as part of the National Information and Early Warning System (NIEWS).

Cereal Availability

Rice availability is used as a proxy for cereal **availability** and the 'Rice Sufficiency Ratio' as a measure of total rice availability (local production plus imports) divided by national requirement (Figure 1). In terms of interpretation, if 'Rice Sufficiency Ratio' is above the value of 1, it indicates that rice availability at country level is more than the requirement (Value of 1 is a threshold while below 1 denotes deficiency).

Figure 1. Rice Sufficiency Ratio



Source: MAF

In 2020, rice availability was estimated at 166,096 Mt (49,983 Mt² from local production and 116,096 Mt from imports) against national requirement of 140,980 Mt.

In the recent past, Timor-Leste has had enough cereal availability at national level (except in 2015 and 2016). Local production, however, account for around 30 percent of this rice availability.

Food Consumption

The 2020 Food Security and Nutrition Survey (FNS 2020) carried between June and September is used to understand levels of dietary diversity.

A Food Consumption Score (FCS), a measure of weight of each food group based upon its relative nutritional value, which is then multiplied by the frequency of consumption, is used to understand food consumption pattern. The FCS is divided into three groups: Poor, Borderline and Acceptable Food Consumption.

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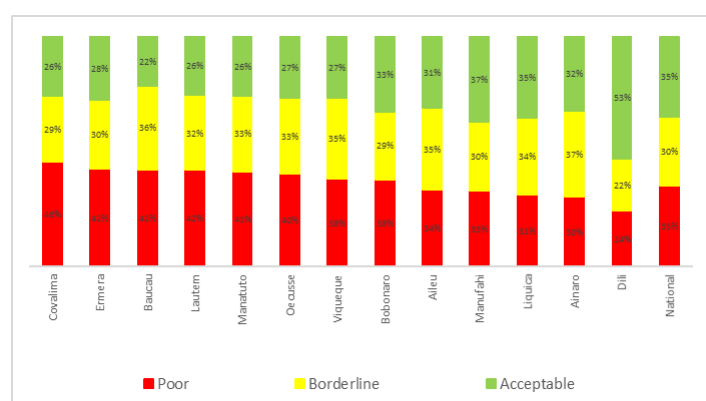
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¹ 2017 National Food and Nutrition Security Policy

² Estimates from Ministry of Agriculture and Fisheries.

Figure 2. Food Consumption Groups by Municipality



Source : TLFNS 2020

At national level, 35.1 percent had poor food consumption, 29.9 percent had borderline and 34.8 percent had acceptable food consumption (Figure 2). At Municipality level, Covalima had the highest percent of households in the poor consumption group at 47 percent while Dili had the lowest at 24 percent. In general, households with poor food consumption consume just staples, vegetables, oil and sugar.

Food and Non-Food Assistance Programme

'Cesta Basica'

In October 2020, the Coordinating Ministry for Economic Affairs (MCAE) with support from the line Ministries/entities³ of MAF, MTCL, NLC and SECOOP began the roll out of the food and non-food assistance programme 'Cesta Basica'. It is a blanket programme where everyone in the population will be assisted.

In terms of modality, areas where retailers are readily available, value vouchers are used, otherwise in-kind assistance is provided worth a maximum value of US\$ 50 per individual. Some of the items included in the basket are rice, beans, potatoes, chicken, eggs, milk, fish, beef, vegetable oil, vegetables, fruits, sugar, hand sanitizer, soap and toothpaste.

As of early January 2021, around 30 percent of the target population had been reached and its planned to be completed by end February 2021.

National Logistic Centre

The National Logistics Centre (NLC) is the responsible institution for the management and distribution of rice, a key staple, in Timor-Leste. In quarter four, the NLC had nearly 30,000 Mt of rice in its warehouses and that of MSSl. It should be noted that much of the local rice has been used for *Cesta Basica*.

Table 1. Availability of rice in NLC and MSSl warehouses

Warehouse	Tonnage
01 Bebora	720
04 Bebora	5,436
MSSl Bebora	1,257
1Tibar	5,924
2Tibar	8,731
3Tibar	7,715
Total	29,783

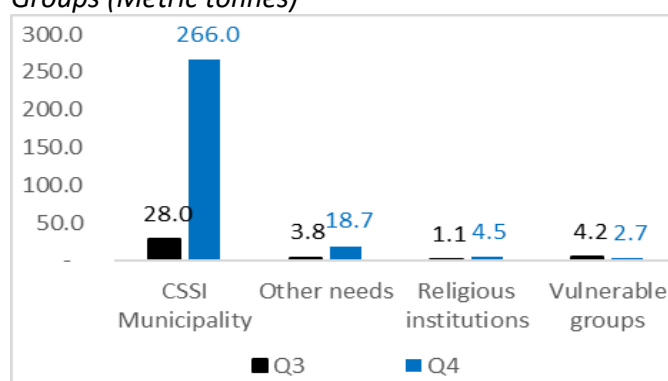
Source: NLC

Ministry of Social Solidarity and Inclusion

The Ministry of Social Solidarity and Inclusion through the National Directorate of Social Assistance (DNAS) continued to deliver rice to vulnerable groups in the fourth quarter of 2020 (Figure 3).

A total of 291.9 Mt of rice were distributed in the fourth quarter compared to 50.2 Mt and 36.5 Mt in the second and third quarter, respectively.

Figure 3: Rice Distribution to Vulnerable Families and Groups (Metric tonnes)



Source: MSSl

Ministry of Interior-Secretary of Civil Protection

The Ministry of Interior through the Secretary of Civil Protection responsible for delivering food to disaster victims, provided various food items to the municipalities as depicted in Table 2.

³ Ministry of Agriculture and Fisheries (MAF), Ministry of Tourism, Commerce and Industry (MTCL) National Logistics Centre (NLC), Secretary of State Cooperatives SECOOP

Table 2. Food Items that were distributed in quarter 4

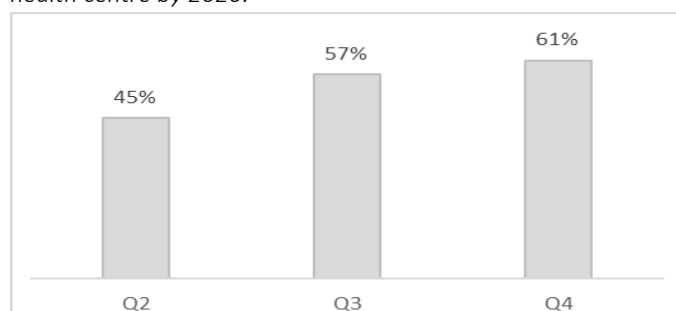
Noodle s (boxes)	Canned Fish (boxes)	Vegetabl e Oil (boxes)	Biscuit s (box)	Milk (powder)(bo x)
2,115	1,000	344	491	174
Water (boxes)	Rice (sacs- 25 kg)	Coffee (kg)	Tea (box)	Sugar (Kg)
410	3,635	500	500	500

Source: Ministry of Interior

Nutrition Status for Children Under-5 Children with Access to Health Centre in 2020⁴

Based on the Health Management Information System, the number of under-five children that accessed the health facility in 2020 increased from 45 percent in quarter two to 61 percent in quarter four.

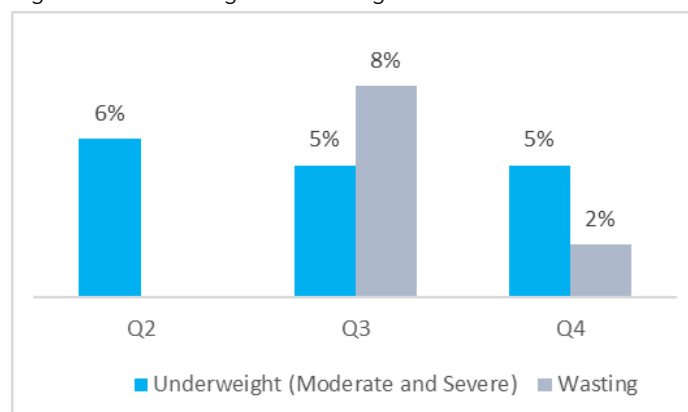
Figure 4. Percentage of under-five children that accessed health centre by 2020.



Source: NIES-MdS

In terms of the nutrition status of the under-five children that accessed the health centre; the percentage who were underweight (moderate and severe) remained relatively stable around 5 percent. While those that were wasted decreased from 8 percent to 2 percent.

Figure 5. Percentage Underweight and Wasted



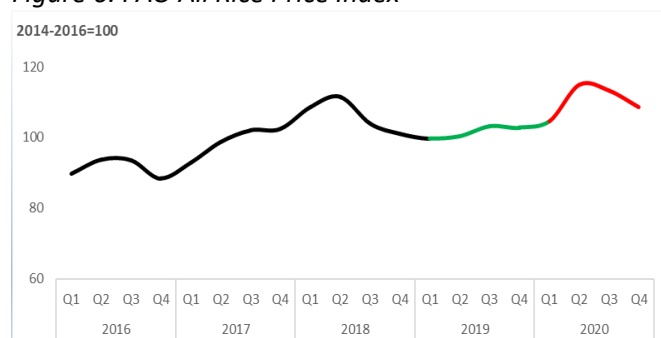
Source: NIES-MdS

Prices

International Rice Prices

In order to measure the direction and magnitude of global rice prices, the FAO All Rice Price Index (2014-2016=100) has been used (Figure 6). The index averaged 108.6 points in November 2020, almost 6.0 percent above its value the same time last year. In general, the index has been higher in 2020 than in the previous four years, with the peak being observed in the second quarter of 2020. This is likely due to protectionism tendencies due to COVID-19 as seen through different levels of export bans, supply chain disruptions, coupled with production shortfalls in some countries such as Vietnam and Bangladesh. Much as there has been a downward trend in the last quarter of 2020, overall global prices remain high and volatile.

Figure 6. FAO All Rice Price Index



Source: FAO

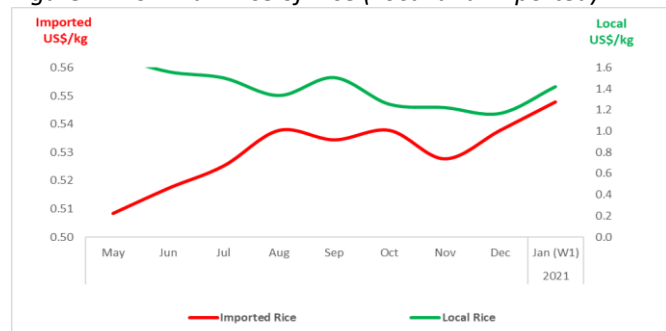
Domestic Rice Prices

Based on the Food Price Monitoring that WFP conducted in collaboration with the Ministry of Agriculture and Fisheries, the price of both imported and local rice showed an upward trend towards the end of December 2020 and in early January 2021.

⁴ It should be noted that there are inherent biases in the nutrition status emanating from the health facility data (compared to Household level Nutrition Surveys) as a significant number of under-fives may not be accessing the health facilities for various reasons.

The recent price uptick in local rice is likely due to increased domestic demand to support the 'Cesta Basica' programme as well as supply chain disruptions due to physical accessibility challenges in the current rainy season. While the uptick in imported rice may be due to the pass-on-effect from increased global rice prices mostly in the exporting countries of Vietnam, one of the biggest rice exporters to Timor-Leste.

Figure 7. Nominal Price of Rice (Local and Imported)



Source: WFP

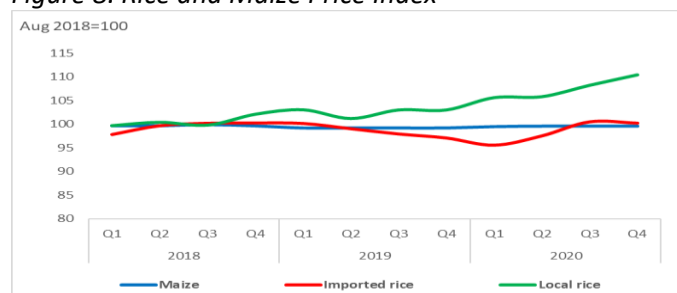
Consumer Price Index

Price Index for Rice and Maize

The price index for local rice (August 2018=100) has been on an upward trend for most part of 2020 reaching 110.4 in the fourth quarter compared to 108.2 and 105.8 in the third and second quarters, respectively. While those of imported rice began a relatively small upward trend in the second quarter of 2020 at the time when exporting countries began to have different levels of protectionist policies in the form of trade restrictions. However, during the fourth quarter of 2020 the price index for imported rice was at 100.2 compared to 100.5 in the third quarter, signifying easing of international border controls towards the end of 2020.

While the price index for maize continued to remain muted through the reference period, with very minimal changes being observed

Figure 8. Rice and Maize Price Index



Source: DGE-Statistics

International Food Trade

Food Exports

A look at the exports of food commodities show a decrease in the volumes in the fourth quarter of 2020 compared to the third for the similar commodities. Dry Coconut was the major exported product in the fourth quarter at 107 Mt. The other commodities exported in the fourth quarter were Candlenut (73 Mt), Arabica Coffee (45 Mt), Robusta Coffee (29 Mt) and Cashew nut (9 Mt).

Table 3. Volume of Exported Food products in Q3 and Q4

Product	Quantity in MT-Q3	Quantity in Mt-Q4
Dry Coconut	390	107
Candlenut	436	73
Arabica Coffee	1,526	45
Robusta Coffee	127	29
Cashew	5	9

Source: DNQB-MAP 2020

Food Imports

In the fourth quarter of 2020, imports of Chicken and eggs increase compared to the previous period. While a decrease was observed for rice, wheat, vegetable oil, pork, and beef.

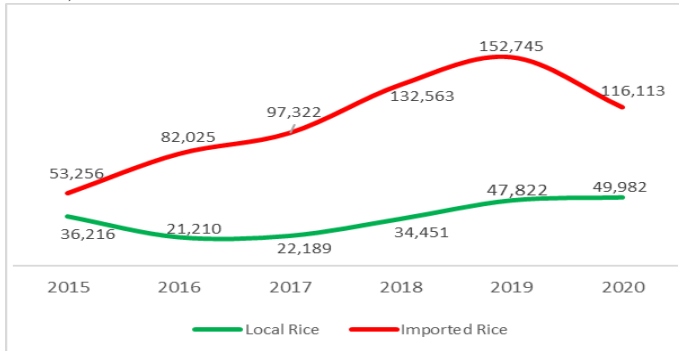
Table 4. Imported volume of food item in Q3 and Q4 (Metric ton)

product	Q3	Q4
Rice	25,011	15,957
Chicken	3,955	4,695
Wheat Flour	5,234	4,614
Vegetable oil	3,859	3,076
Fish	1,011	1,007
Eggs	412	603
Pork	69	51
Beef	4	1

Sources : Customs-MOF

In terms of volumes, rice is the most imported commodity in Timor-Leste accounting for more than half of all food imports. Trend-wise, 2020 volumes are lower than 2019 and 2018 levels by 24 percent and 12 percent, respectively.

Figure 9. Trends in Rice Imports and Local Production (Metric tonnes)



Source: Customs (MOF) and MAF

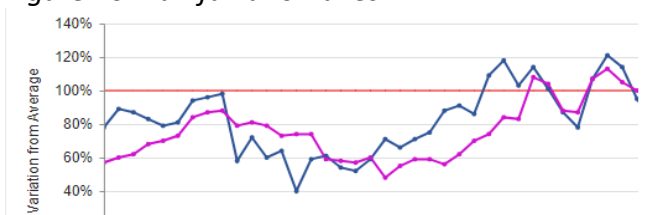
Climate and Earth Observation

Globally, *LaNiña* conditions are currently active and expected to last until the first quarter of 2021. While for the Indonesian region, wetter than average conditions are expected, implying good conditions for crop production but with downside of flooding and flash flood hazards being more likely.

Rainfall Distribution

In the fourth quarter of 2020, rainfall distribution was between 10mm to 539mm. Normal monthly rainfall amounts are usually between 200mm to 400mm, when this is exceeded then there is a likelihood of floods. Overall, the last quarter of 2020 saw rainfall amounts being above normal (figure 10)

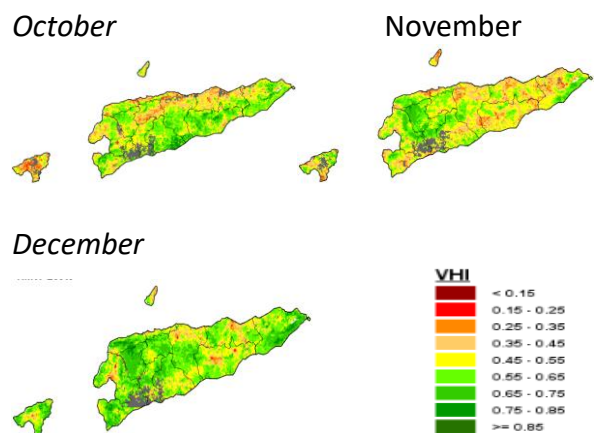
Figure 10. Rainfall anomalies



Vegetation Health Index

The Vegetation Health Index (VHI) provides the severity of drought based on the vegetation health and influence of temperature on plant conditions. A decrease in the VHI would indicate relatively poor vegetation conditions and warmer temperatures, signifying stressed vegetation conditions. In quarter four, the index ranged from 0.35 to 0.85 (orange to old green category) a situation that is favourable for agriculture production.

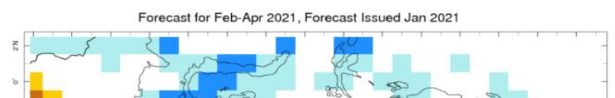
Fig 11 Vegetation Health Index



Seasonal Forecast

Based on the European Centre for Medium-Range Weather Forecasts, the three-month forecast issued January 2021, shows a slightly increased chance of wet season, 35 to 40 percent, of unusually wet season.

Figure 12. Seasonal Forecast: Feb-Apr 2020)



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