

Crop Watch

February 29th 2024

Vol. 1- 2024

Rice

This report illustrates the situation of availability of rice and OFC crops in 2024 based on the cultivation area and imports up to end January 2024. In addition, district wise harvesting schedules, production, imports and price trends are included as supportive information.

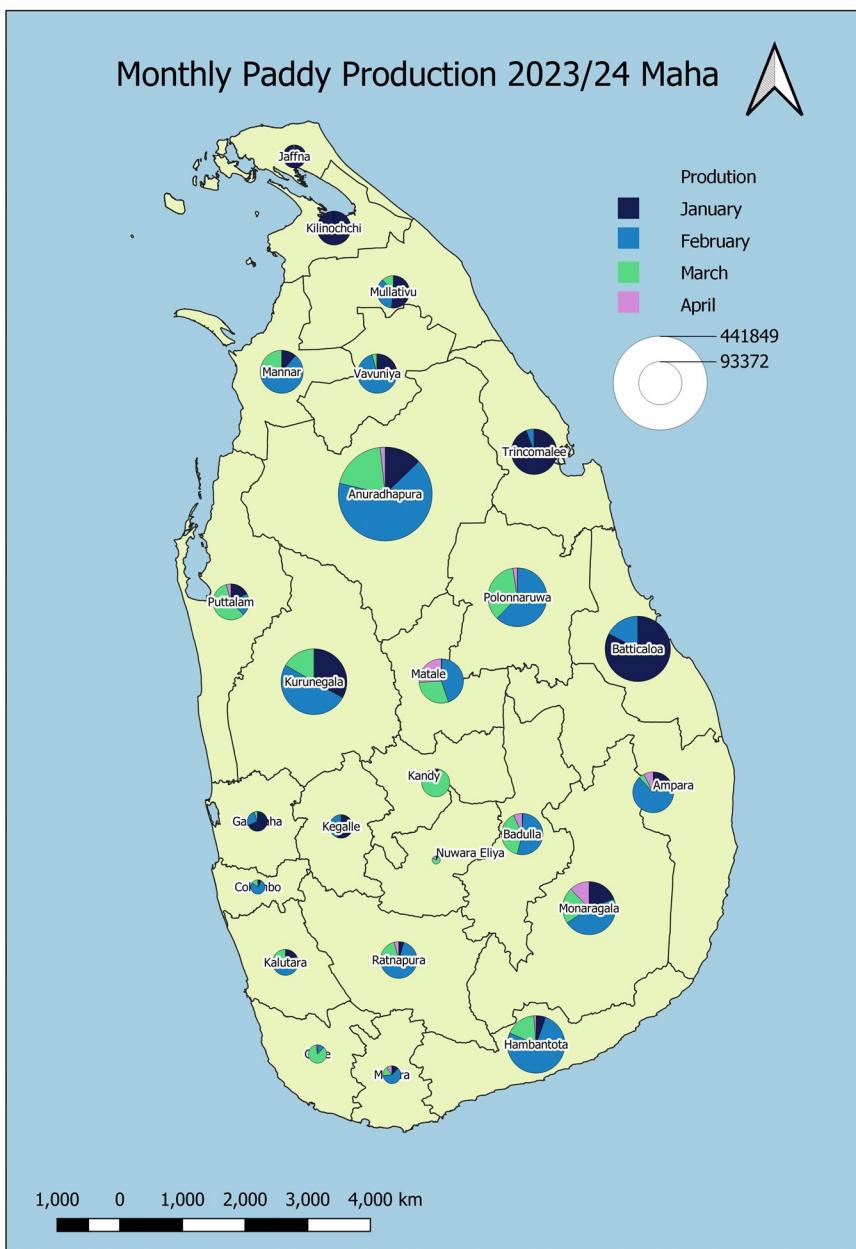
Summary

- National rice production from Maha 2023/24 season - 1.65 million mt.
- Rice imports as at end January 2024 - 0.028 million mt.
- When compared with the 2022/23 Maha, expected local production of all OFC's reported below 100%, except maize, black gram and ground nut.

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Paddy - Production & Availability



Rice

Paddy: Seasonal Production (mt)

Year	Production ('000 mt)		
	Maha	Yala	Total
2010	2,630	1,671	4,301
2011	1,996	1,899	3,895
2012	2,717	1,129	3,846
2013	2,846	1,774	4,621
2014	2,515	1,147	3,662
2015	2,877	1,942	4,819
2016	2,903	1,517	4,420
2017	1,474	909	2,383
2018	2,397	1,513	3,910
2019	3,073	1,468	4,540
2020	3,197	1,924	5,121
2021	3,061	2,088	5,150
2022	1,931	1,462	3,393
2023	2,696	1,830	4,526
2024 forecast*	2,639		

Source – Department of Census and Statistics

(Crop Forecast February 15th 2024) 2023/24 –Maha - DOA

Paddy: Seasonal Production (mt)

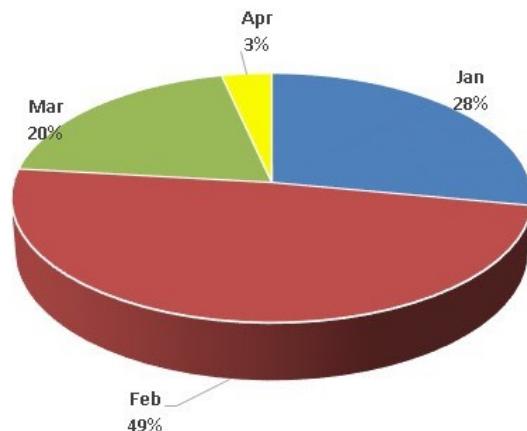


Paddy: District wise expected production (mt)

District	Production forecast* (Mt)
Provincial Areas	1,697.824
Colombo	10,271
Gampaha	17,698
Kalutara	33,808
Galle	16,921
Matara	16,519
Ratnapura	37,691
Kegalle	27,604
Kurunagala	229,212
Puttalam	62,003
Kandy	25,462
Matale	65,739
Neliya	3,386
Badulla	42,800
Monaragala	114,250
Jaffna	22,884
Kilinochchi	51,627
Vavuniya	76,634
Mullaitivu	52,585
Mannar	84,917
Anuradhapura	283,950
Trincomalee	126,293
Batticaloa	209,306
Ampara	27,095
Hambantota	58,684
Inter Province Areas*	586,729
Polonnaruwa IP	121,278
Ampara IP	164,532
Monaragala IP	26,520
Hambantota IP	73,827
Hasalaka IP	52,353
Anuradhapura IP	118,219
Mahaweli Systems	384,965
Udawalawa	58,935
System H	83,029
System H1	33,210
System E	75,854
System C	89,891
System G	23,810
System D	4,976
Rambakanoya	5,574
System L	9,685
Sri Lanka	2,639,015

Source – Crop Forecast, Department of Agriculture

- Expected paddy production of Maha 2023/24 season would be decreased by 1% when compared with the last year production and 3% increase with the past three year average.
- Maha 2023/24 local rice production is sufficient to feed household consumption needs for 8 months.
- Rice imports as at end January 2024 is 0.028 million mt.
- At the end of February, paddy harvesting would be completed in 77% of paddy area cultivated in Maha 2023/ 24 season.



Paddy: Harvesting schedule - All Island

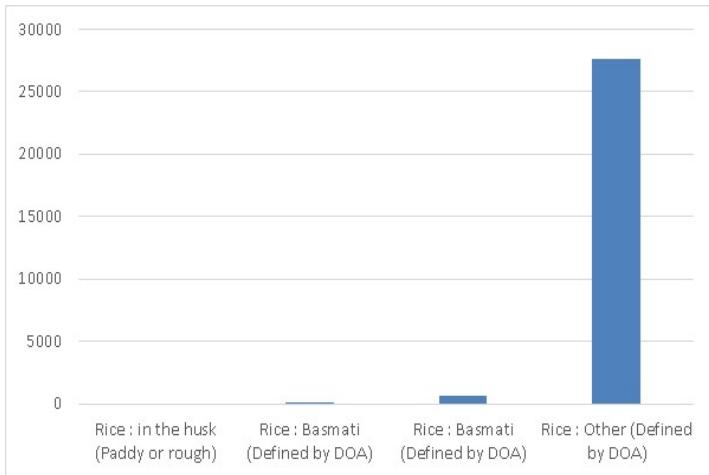
Rice

Rice Availability - 2024 (Situation based on Cultivation as at end January 2024)

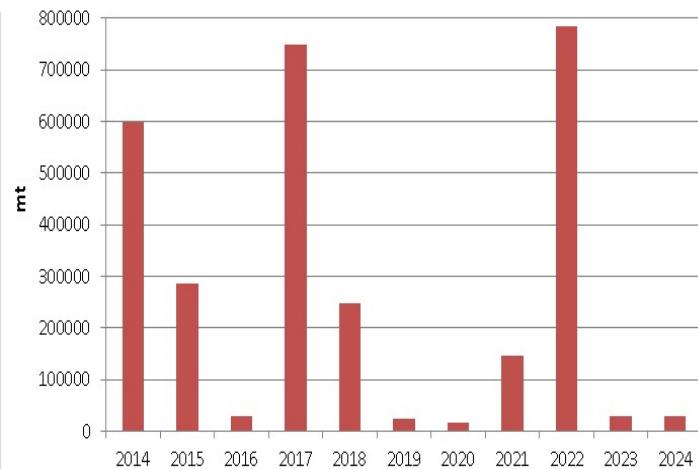
<u>Domestic rice production : 2023/24 Maha</u>			
Maha 2023/24			
Maha 2023/24 expected production (from the reported cultivation extent as at end January 2024)		million mt	2.64
Seed paddy requirement for Yala 2024 Cultivation **		million mt	0.05
Wastage		million mt	0.16
Total paddy availability for consumption from Maha 2023/24 production		million mt	2.43
Total rice availability from Maha 2023/24 production		million mt	1.65
<u>Rice consumption/ Requirement /Usage : 2023/24</u>			
Household rice per capita consumption	Kg/year/person		112.3
Population 2023	number		22,646,113
Total rice requirement	million mt		2.54
Per month national rice requirement	mt		211,930
Months can be fed from Maha 2023/24 expected production			7.80
Assumptions			
Seed Paddy requirement for Yala 2024 = Average sown extent Yala 21-23 * Seed paddy requirement per ha			
Seed paddy requirement per ha = 102.35 kg			
Wastage = 6% from paddy production			
No use for animal feed and manufacturing			
Total national rice requirement *** - Rice usage for rice based value added products (except rice packets brought from shops, hoppers, string hoppers, & pittu), the differences of consumption pattern of rice in the persons live in collective quarters (boarding places, hostels, barracks, religious places) etc... are not considered for calculating national rice requirement.			
Sources:			
Household rice per capita consumption - Household Income and Expenditure Survey 2019, Department of Census and Statistics			
Population 2023 & population growth rate were calculated from - Central Bank report 2022			

Rice

Rice Imports - 2024

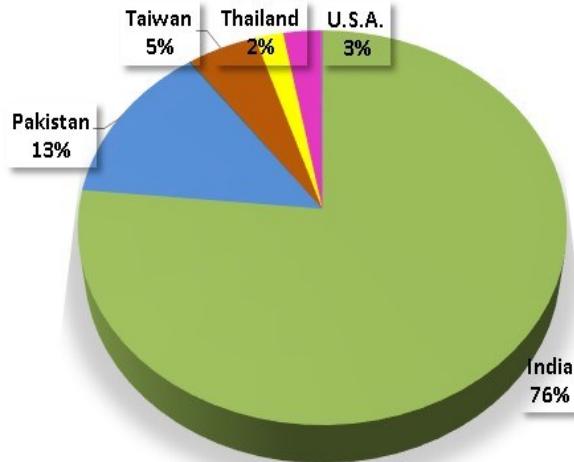


Rice - Rice imports by type 2024



Rice - Annual Imports

Source – Sri Lanka Customs



Rice - Import origins and share - 2023

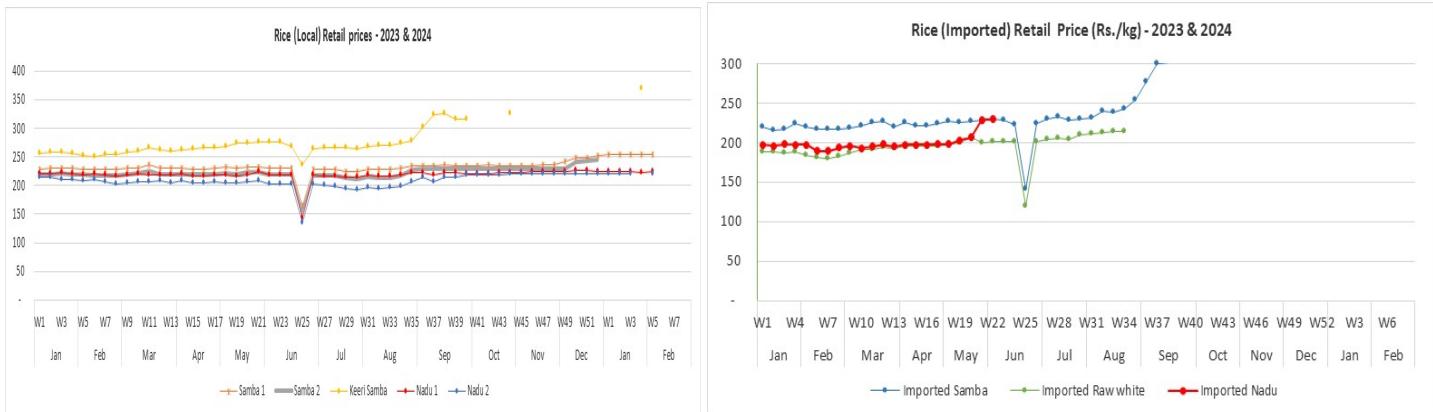
Rice - Annual Imports

Year	Month	Quantity (mt)	Value (Rs.)
2014		600,020	655,101,203
2015		285,604	1,369,116,822
2016		29,524	625,430,423
2017		747,800	776,838,005
2018		248,901	882,026,014
2019		24,193	886,623,179
2020		15,770	1,446,790,211
2021		147,090	1,397,281,979
2022		783,421	1,965,664,991
2023		29,604	5,602,773,586
2024	Jan	28,380.6	6091904926

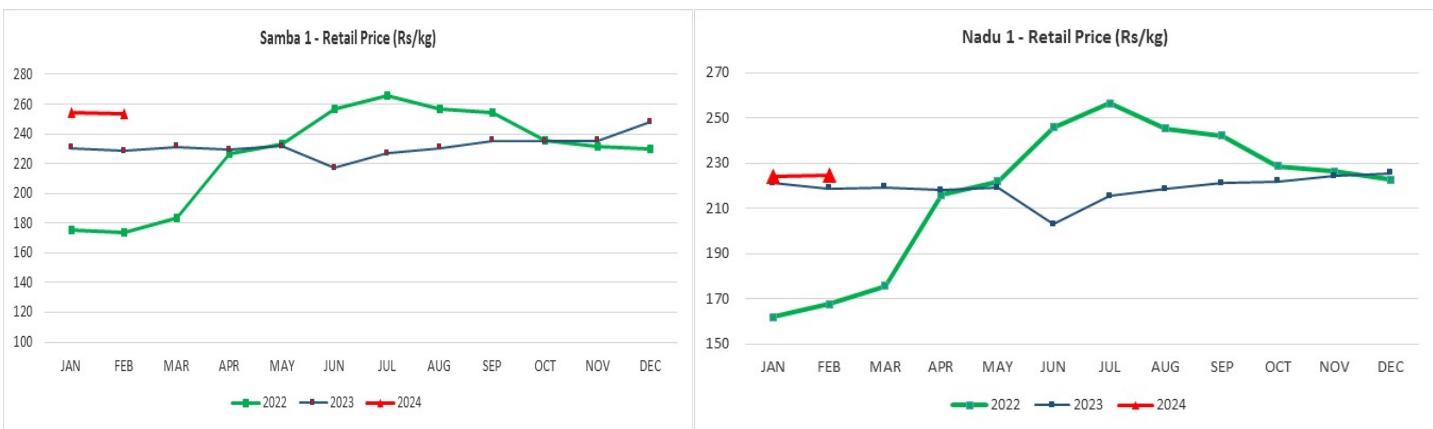
- Rice imports as at end January 2024 is 28,380 mt.
- Major importing rice types are Raw rice and Parboiled rice which consists of 54% and 46% respectively from the total imports.
- 76% of rice imports were originated from India in year 2023.

Rice

Rice Prices - 2023 - 2024



Rice : Trend of weekly retail prices - 2023 & 2024 (Rs./kg)



Rice : Retail prices 2022, 2023 & 2024 (Rs./kg)

Rice : Retail prices in January 2023 & 2024 (Rs./kg)

Rice Type	2023 January -average (Rs./kg)	2024 January - average (Rs./kg)	2024 January last week (Rs./kg)	Change in price of January 2024 compared to January 2023
Samba 1	230	254	255	10
Samba 2	220	0	0	0
Keeri Samba	257	369	369	44
Nadu 1	221	224	223	1
Nadu 2	213	220	0	3
Raw (Red)	216	206		-5
Raw (White)	212	216		2
Imported Samba	220	330	330	50

- Retail price has increased in January 2024, from 10% in Samba, 1% in Nadu and 44% in Keeri samba compared to January 2023.
- Compared to January 2023, retail price of local rice varieties in 2024 January shows slight increase and Imported samba shows 50% increase.

Paddy Minimum Purchasing Prices (DOA)

Keeri Samba - 130 Rs./kg

Samba - 120 Rs./kg

Nadu - 105 Rs./kg

Other Field Crops

OFC - Crop availability and requirement- 2024

	General Situation			National Requirement (mt)	Monthly Requirement (mt)	2024					
	Annual Production (mt)	Annual Imports (mt)	National Availability (mt/year)			Maha 2023/24 Production (mt) (Based on the Cultivation Area as at End January 2024)	Yala 2024 Expected pro. (Based on Indicative targets.) (mt)	Total Production (mt)	Imports till End January 2024 (mt)	National Availability (mt)	Balance (mt)
Maize	348,335	72,216	420,550	600,000	50,000	307,922	88,000	395,922	19,871	415,793	(184,207)
Potato	62,391	134,308	196,699	225,000	18,750	15,232	41,500	56,732	16,370	73,102	(151,898)
Big Onion	45,929	262,355	308,285	300,000	25,000	60	80,000	80,060	20,911	100,971	(199,029)
Red Onion	58,578	11,147	69,725	75,000	6,250	15,105	42,000	57,105	5,796	62,901	(12,099)
Chilli (Dry)	1,168	49,539	50,707	52,000	4,333	343	113	455	3,751	4,206	(47,794)
Soybean	9,347	213,115	222,462	225,000	18,750	199	17,500	17,699	23,214	40,913	(184,087)
Green gram	15,644	3,593	19,237	20,000	1,667	4,535	32,667	37,202	-	37,202	17,202
Cowpea	13,444	1,340	14,784	15,000	1,250	4,544	10,000	14,544	1	14,545	(456)
Black gram	11,295	155	11,450	20,000	1,667	10,703	4,000	14,703	-	14,703	(5,297)
Ground nut	35,059	216	35,275	35,000	2,917	19,686	14,980	34,666	19	34,685	(315)
Finger millet	8,477	295	8,772	10,000	833	3,935	-	3,935	-	3,935	(6,065)

Note: *Maize national requirement is based on the information provided by the Department of Animal Production and Health.

* National requirement of all the other crops are based on the round off value of mean annual crop availability for past 3 Years (2020-2022).

It is expected that 5% of the green chilli production would be converted to dry chilli, Conversion factor of green chilli into dry chilli is 4:1.

OFC - Crop Imports (mt) - Maha 2023/24 Season

Year	Month	Finger millet	Maize	Greengram	Cowpea	Blackgram	Gingelly	Groundnut	Soybean	Potato	Redonion	Bigonion	Chilli (Dry)
2015		765	67,237	11,513	5,678	7,080	95	3,479	184,494	142,183	15,168	210,253	49,928
2016		1,784	41,946	13,862	6,055	11,217	129	3,095	202,109	148,081	19,842	215,593	50,991
2017		2,918	179,589	15,541	7,345	12,767	223	3,876	223,093	114,889	10,911	232,318	51,692
2018		3,084	119,086	16,425	8,136	12,414	260	4,300	220,145	160,297	15,276	246,237	52,849
2019		4,002	102,461	13,261	8,521	7,794	433	3,167	221,912	143,887	6,020	240,102	52,560
2020		884	29,820	10,752	3,959	463	711	648	218,867	129,522	6,216	265,863	50,780
2021		0	8,175	0	54	0	1	0	230,011	118,579	12,790	257,421	50,139
2022		0	178,652	26	5	0	0	0	190,468	154,824	14,437	263,781	47,696
2023	Jan	0	18,046	0	1	0	0	0	22,628	18,011	1,677	27,638	3,080
	Feb	0	9,768	0	0	0	0	0	20,994	14,258	1,589	23,207	4,224
	Mar	0	82	0	1	0	0	0	25,679	20,479	1,341	30,172	3,408
	Apr	0	228	1	1	0	0	0	13,204	9,545	1,522	23,253	2,183
	May	0	99	0	2	0	0	50	15,495	12,983	1,291	27,523	4,027
	June	0	1,009	0	0	0	0	100	17,892	12,052	1,031	28,435	1,742
	July	0	1,335	3	0	0	0	0	20,243	18,162	78	30,815	4,584
	Aug	0	1,505	0	1	0	1	0	23,961	15,890	8	26,951	3,059
	Sep	0	28,480	0	1	100	0	0	14,390	9,903	87	21,310	2,348
	Oct	0	65,518	0	1	100	0	0	14,738	8,280	42	20,521	4,651
	Nov	0	41,707	0	1	0	0	0	12,705	9,640	1,025	18,604	3,321
	Dec	0	29,465	0	0	0	0	150	17,024	19,777	1,849	15,956	3,448
2023		0	197,242	4	7	200	1	300	218,951	168,980	11,540	294,386	40,075
2024	Jan	0	19,871	0	1	0	0	19	23,214	16,370	5,796	20,911	3,751
2024		0	19,871	0	1	0	0	19	23,214	16,370	5,796	20,911	3,751

Maize

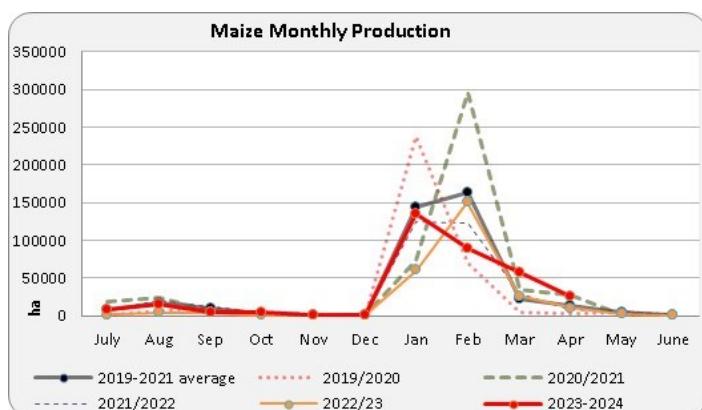
	Maha		Yala		Total		Annual Imports (mt)	Annual Requirement (mt)	Balance (mt)
	Ext. (ha)	Pro. (mt)	Ext. (ha)	Pro. (mt)	Ext. (ha)	Pro. (mt)			
General Situation	71,229	291,572	8,875	34,593	80,103	326,165	46,819	600,000	
Year 2024	78,280	307,922	18,500	88,000	96,780	395,922	19,871	600,000	(184,207)

Production up to end of April 2024

Imports till end of January 2024

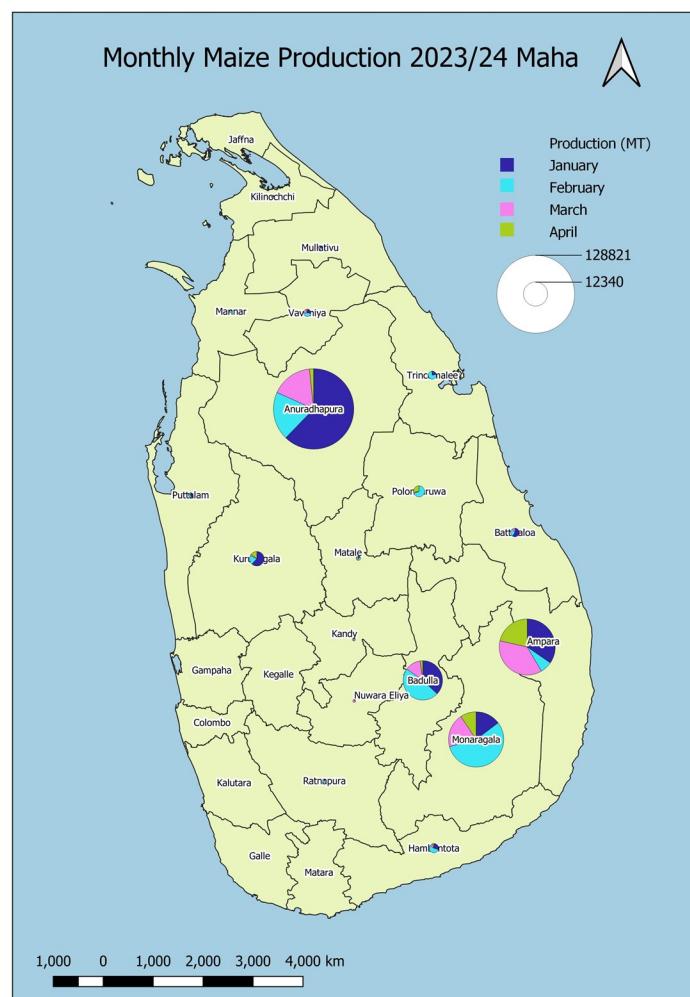
* Yala 2024 Production - Calculated based on the indicative target from Extension, DOA

Monthly Production



Maize: Monthly production pattern

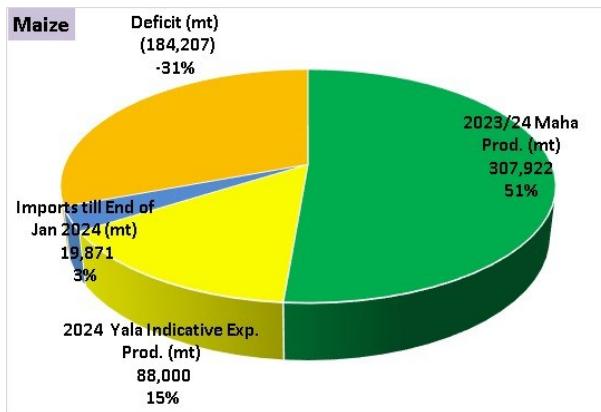
- The annual maize requirement is 600,000 mt (source-Department of Animal Production and Health)
- Total expected production of Maize would be 21% lower than a normal year,
- A higher production of maize which reached the market in Maha 2023/24 season was mainly from Anuradhapura district.
- Maha 2023/24 maize production would be sufficient to reach the national maize requirement up to end June.



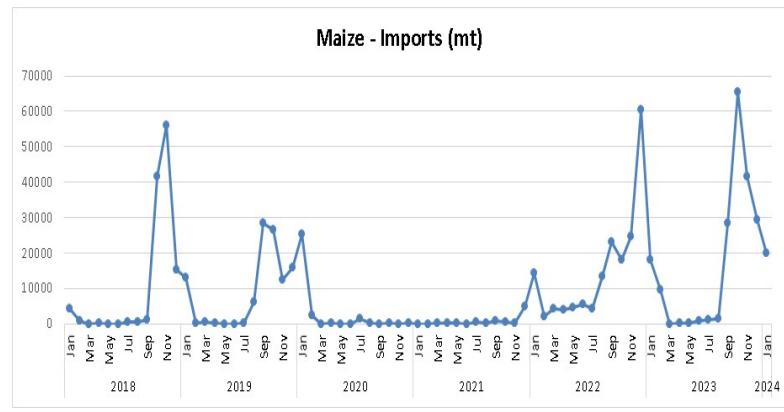
District wise harvesting schedule

	Value (mt)
National Requirement	600,000
Maha 2023/24 expected production	307,922
Yala 2024 expected production (Indicative target)	88,000
Total Production 2024	395,922
Imports as at end January 2024	19,871
National availability for 2024	415,793

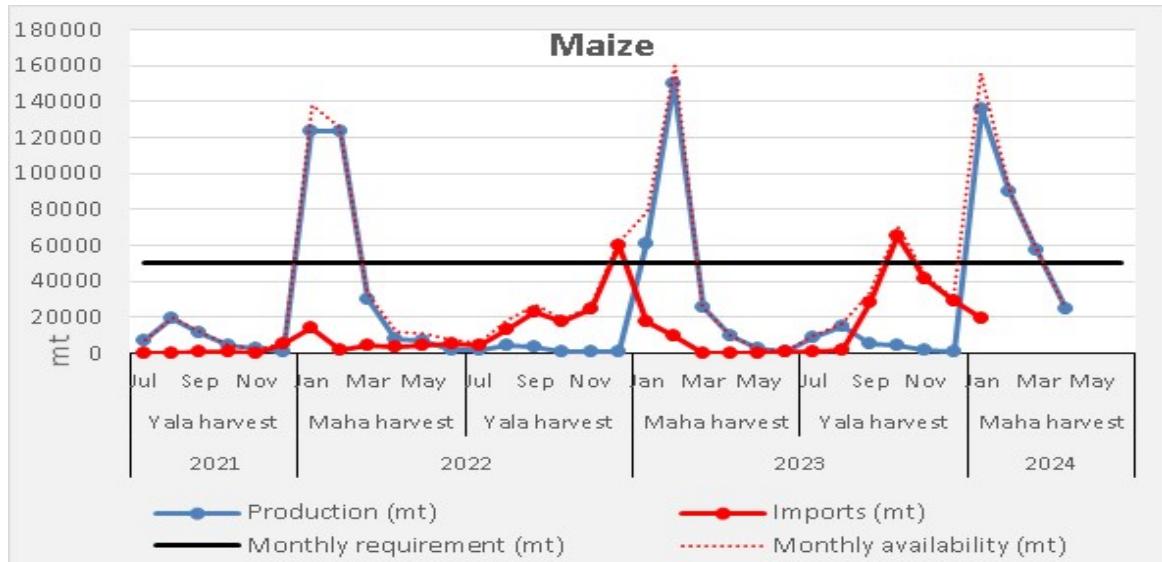
Maize



Maize: Share of annual availability



Maize: Monthly imports



Maize : Monthly Availability

Maize : Monthly Balance

Season	Month	Production (mt)	Imports (mt)	Monthly requirement (mt)	Monthly availability (mt)	Monthly Balance (mt)
Maha harvest 2023/24	Jan	135,638	19,871	50,000	155,509	105,509
	Feb	90,030		50,000	90,030	145,539
	Mar	57,247		50,000	57,247	152,786
	Apr	25,006		50,000	25,006	127,792
	May	0		50,000	0	77,792
	Jun	0		50,000	0	27,792

Assumption: No brought forward stocks from last year

Dry Chilli

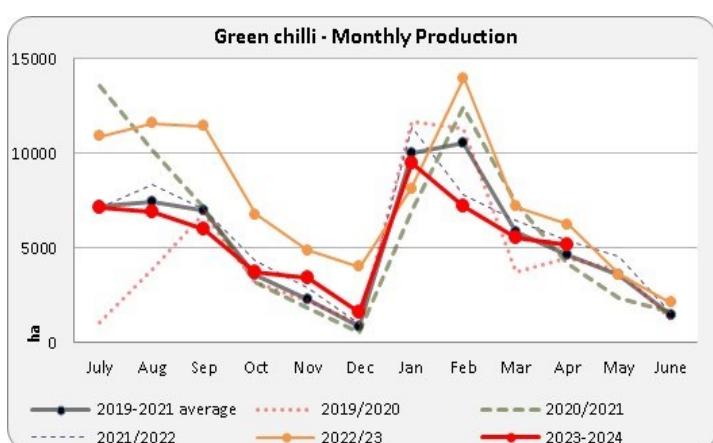
	Maha		Yala		Total		Annual Imports (mt)	Annual Requirement (mt)	Balance (mt)
	Ext. (ha)	Pro. (mt)	Ext. (ha)	Pro. (mt)	Ext. (ha)	Pro. (mt)			
General Situation	377	502	249	392	626	894	51,160	52,000	
Year 2024	392	343	300	9,000	692	9,343	3,751	52,000	(38,906)

Production up to end of April 2024

Imports till end of January 2024

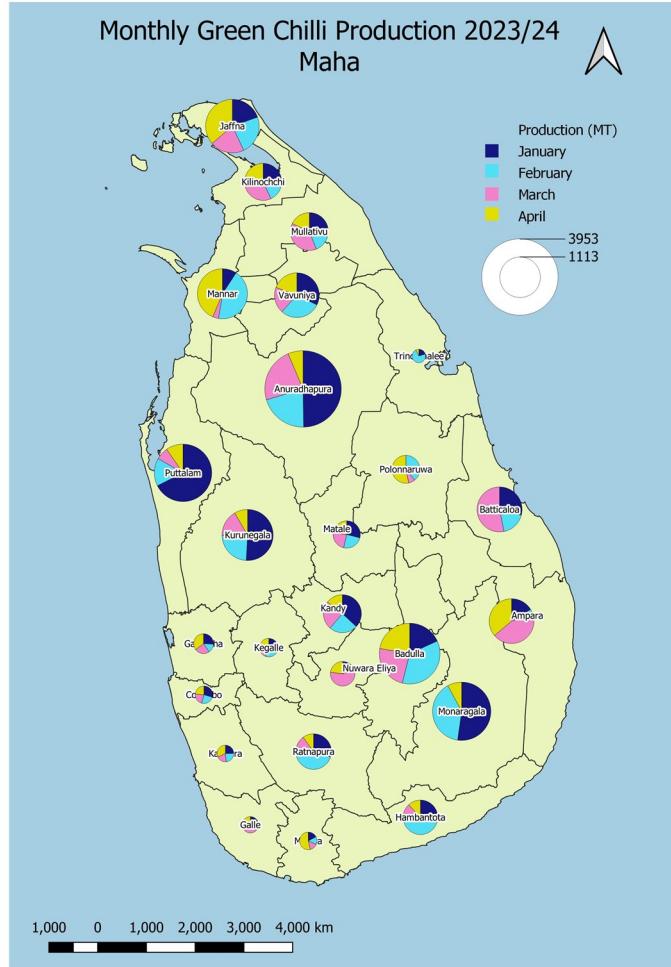
* Yala 2024 Production - Calculated based on the indicative target from Extension, DOA

Monthly Production—Green Chilli



Chilli : Monthly production pattern

- A higher green chilli production is expected from Anuradhapura, Puttalum, Badulla and Moneragala districts.
- Dry chilli imports as at end January 2024 is 3,751 mt.



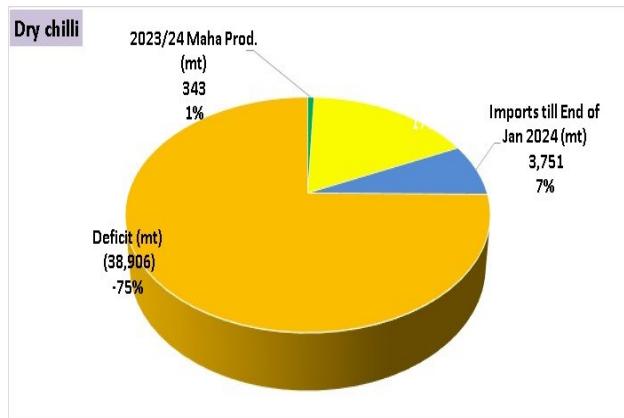
District wise harvesting schedule

- It is expected that 5% of the green chilli production would be converted to dry chilli.
- Conversion factor of green chilli in to dry chilli is 4:1.

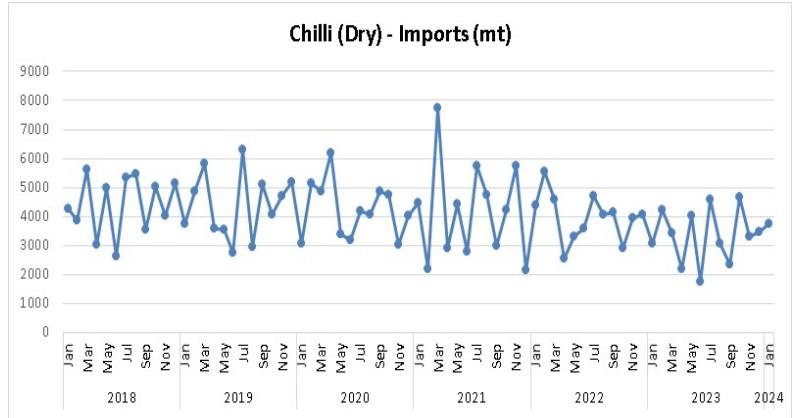
	Value (mt)
National Requirement	52,000
Maha 2023/24 expected production	343
Yala 2024 expected production (Indicative target)	9,000
Total Expected Production 2024	9,343
Imports as at end January 2024	3,751
National availability for 2024	13,094

Dry Chilli

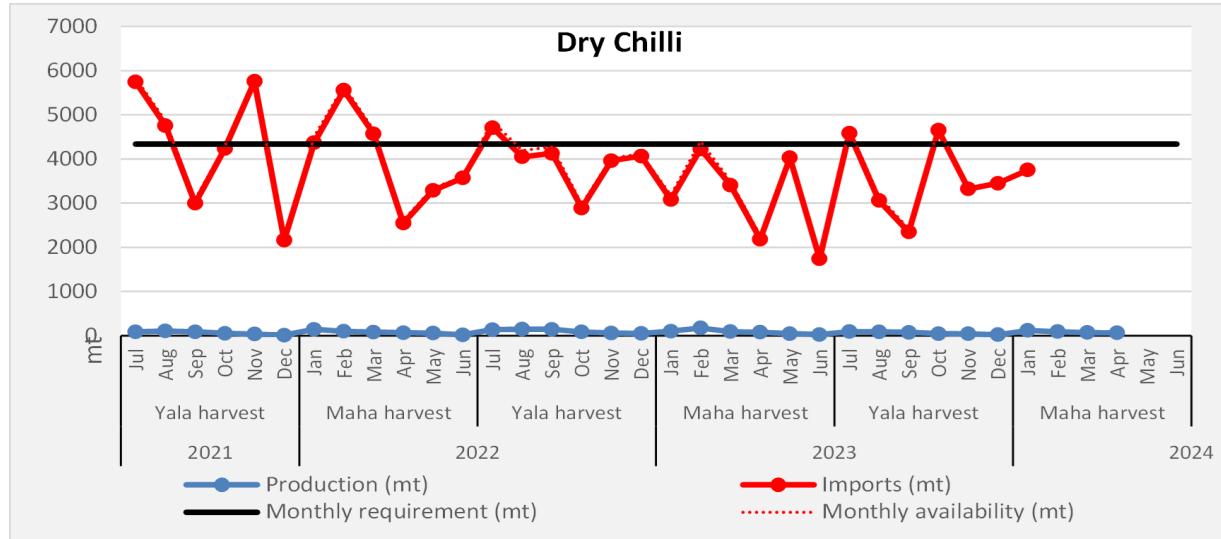
Monthly Availability



Chilli: Share of annual availability



Chilli : Monthly Availability



Dry Chilli : Monthly Availability

Dry Chilli : Monthly Balance

Season	Month	Production (mt)	Imports (mt)	Monthly requirement (mt)	Monthly availability (mt)	Monthly Balance (mt)
Maha harvest 2023/24	Jan	119	3,751	4,333	3,869	(464)
	Feb	90		4,333	90	(4,243)
	Mar	70		4,333	70	(4,264)
	Apr	65		4,333	65	(4,269)
	May	0		4,333	0	(4,333)
	Jun	0		4,333	0	(4,333)

Assumption: No brought forward stocks from last year

Red Onion

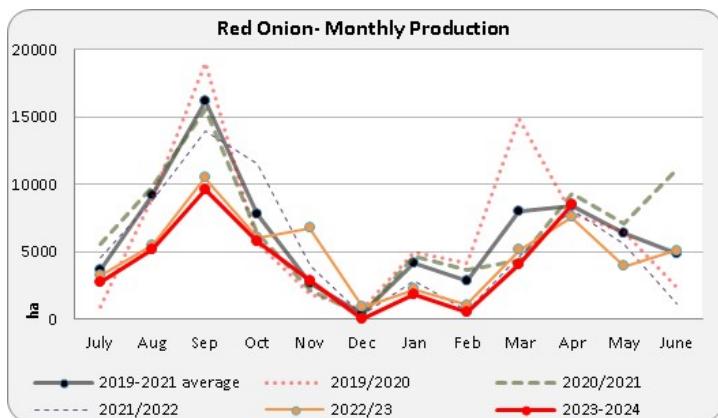
	Maha		Yala		Total		Annual Imports (mt)	Annual Requirement (mt)	Balance (mt)
	Ext. (ha)	Pro. (mt)	Ext. (ha)	Pro. (mt)	Ext. (ha)	Pro. (mt)			
General Situation	2,148	30,539	2,232	26,484	4,381	57,023	8,342	75,000	
Year 2024	1,496	15,105	3,500	42,000	4,996	57,105	5,796	75,000	(12,099)

Production up to end of April 2024

Imports till end of January 2024

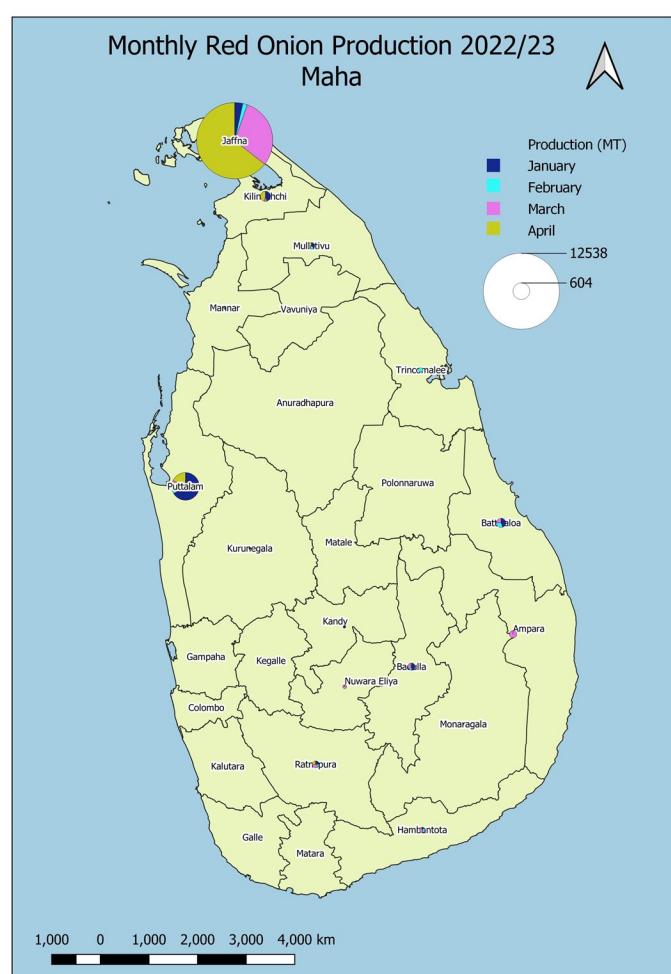
* Yala 2024 Production - Calculated based on the indicative target from Extension, DOA

Monthly Production



Red onion: Monthly production pattern

- Red onion production in 2024 would be same as normal year production.
- A higher Red Onion production will be from Jaffna and Puttalam districts.

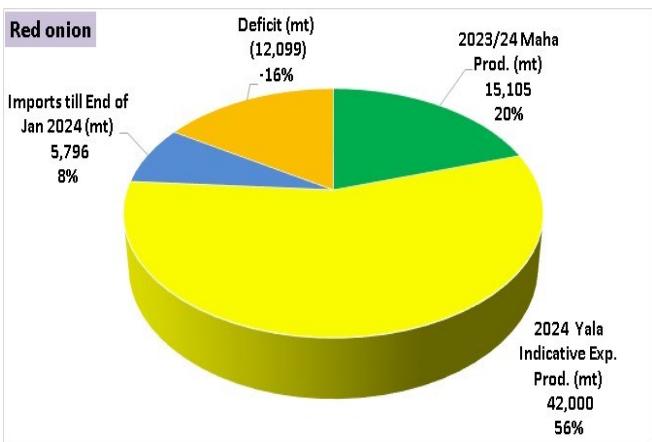


District wise harvesting schedule

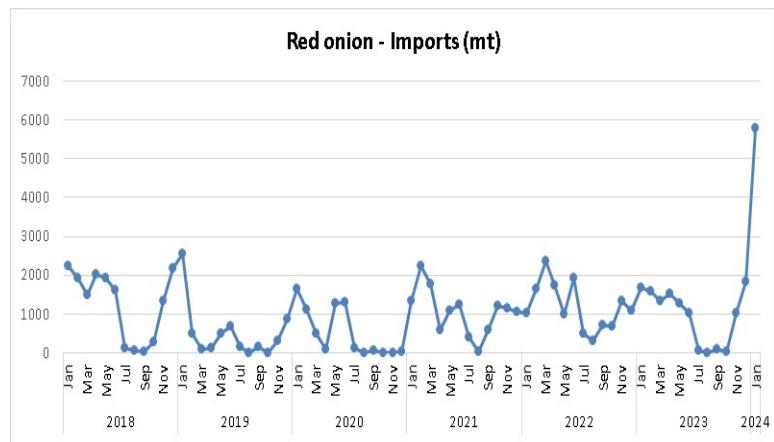
	Value (mt)
National Requirement	75,000
Maha 2023/24 expected production	15,105
Yala 2024 expected production (Indicative target)	42,000
Total Expected Production 2024	57,105
Imports as at end January 2024	5,796
National availability for 2024	62,901

Red Onion

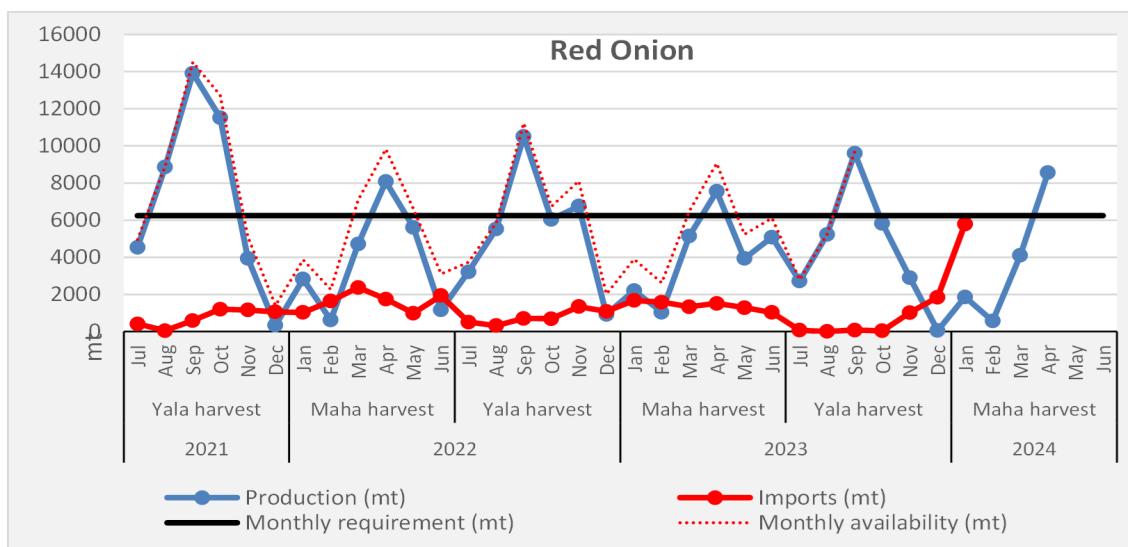
Monthly Availability



Red onion: Share of annual availability



Red onion: Monthly Availability



Red Onion: Monthly Availability

Red onion: Monthly Balance

Season	Month	Production (mt)	Imports (mt)	Monthly requirement (mt)	Monthly availability (mt)	Monthly Balance (mt)
Maha harvest 2023/24	Jan	1,866	5,796	6,250	7,662	1,412
	Feb	572		6,250	572	(4,266)
	Mar	4,109		6,250	4,109	(6,407)
	Apr	8,557		6,250	8,557	(4,100)
	May	0		6,250	0	(10,350)
	Jun	0		6,250	0	(16,600)

Assumption: No brought forward stocks from last year

Big Onion

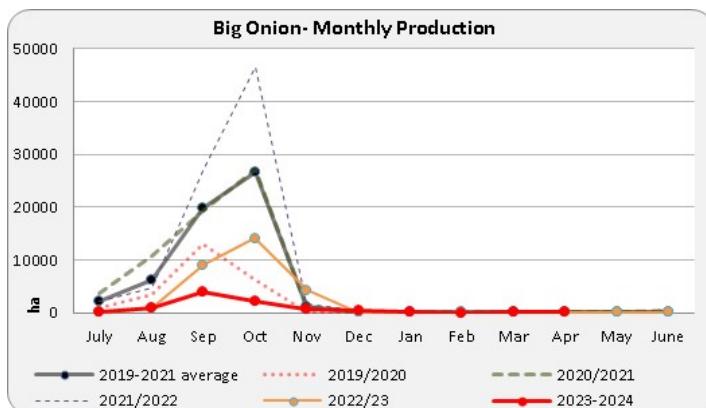
	Maha		Yala		Total		Annual Imports (mt)	Annual Requirement (mt)	Balance (mt)
	Ext. (ha)	Pro. (mt)	Ext. (ha)	Pro. (mt)	Ext. (ha)	Pro. (mt)			
General Situation	122	1,279	1,750	32,284	1,872	33,563	254,462	300,000	
Year 2024	25	60	4,200	80,000	4,225	80,060	20,911	300,000	(199,029)

Production up to end of April 2024

Imports till end of January 2024

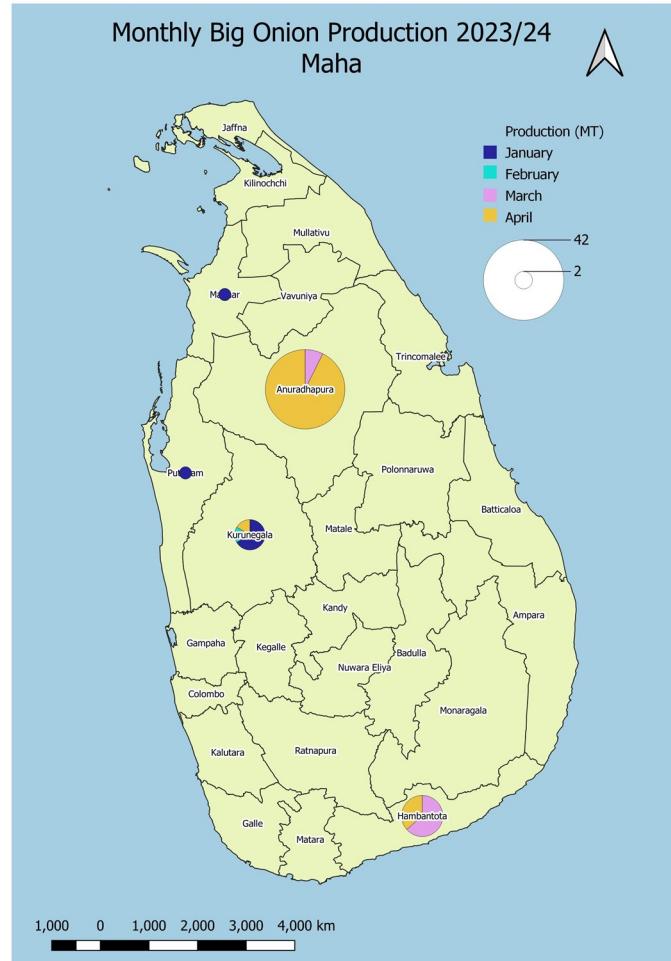
* Yala 2024 Production - Calculated based on the indicative target from Extension, DOA

Monthly Production



Big onion: Monthly production pattern

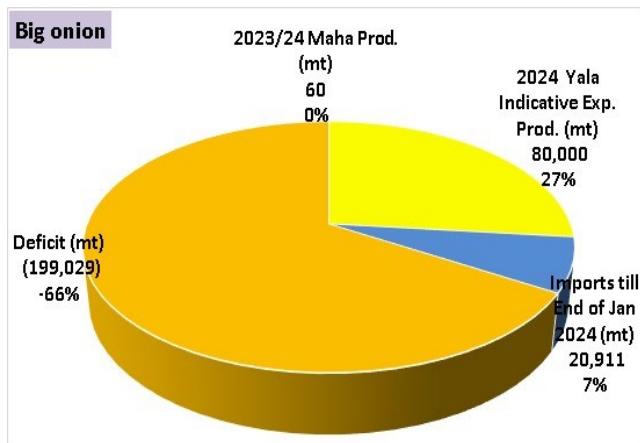
- The expected production of big onion in Maha 2023/24 season would be very low (60mt) compared to the previous identical seasons.
- Local big onion production would be available in the market mainly from March onwards from Anuradhapura and Hambantota districts.
- Unless otherwise the indicative target of Yala 2024 reached, almost all the national big onion requirement should be imported in the rest of the months.



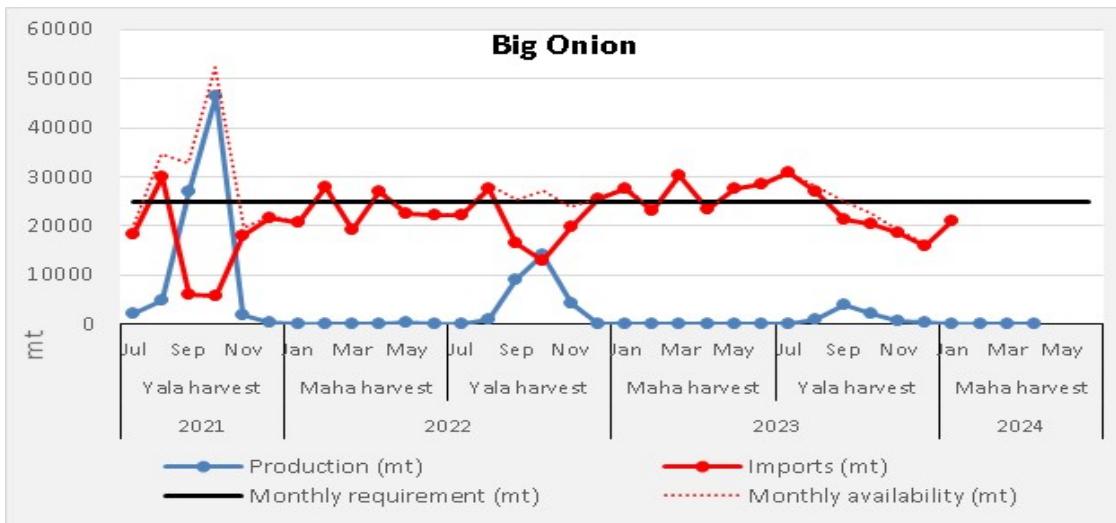
	Value (mt)
National Requirement	300,000
Maha 2023/24 expected production	60
Yala 2024 expected production (Indicative target)	80,000
Total Expected Production 2024	80,060
Imports as at end January 2024	20,911
National availability for 2024	100,971

Big Onion

Monthly Availability



Big onion: Share of annual availability



Big Onion: Monthly Availability

Big onion: Monthly Balance

Season	Month	Production (mt)	Imports (mt)	Monthly requirement (mt)	Monthly availability (mt)	Monthly Balance (mt)
Maha harvest 2023/24	Jan	6	20,911	25,000	20,917	(1,570)
	Feb	1		25,000	1	(24,999)
	Mar	11		25,000	11	(24,989)
	Apr	43		25,000	43	(24,957)
	May			25,000		(25,000)
	Jun			25,000		(25,000)

Assumption: No brought forward stocks from last year

Potato

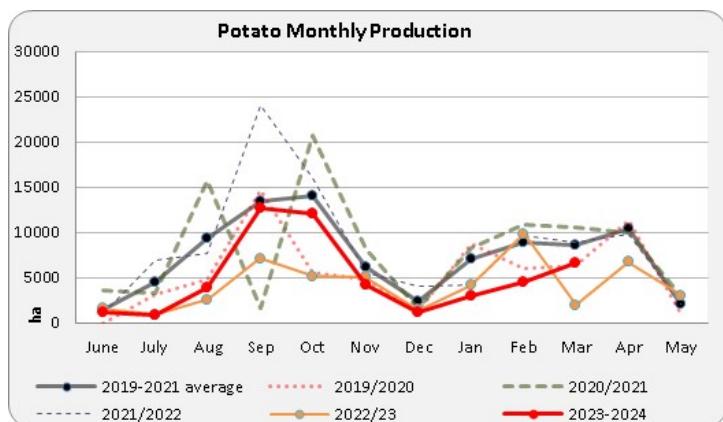
	Maha		Yala		Total		Annual Imports (mt)	Annual Requirement (mt)	Balance (mt)
	Ext. (ha)	Pro. (mt)	Ext. (ha)	Pro. (mt)	Ext. (ha)	Pro. (mt)			
General Situation	2,353	39,945	2,344	42,939	4,698	82,884	130,663	225,000	
Year 2024	1,493	15,232	2,300	41,500	3,793	56,732	16,370	225,000	(151,898)

Production up to end of March 2024

Imports till end of January 2024

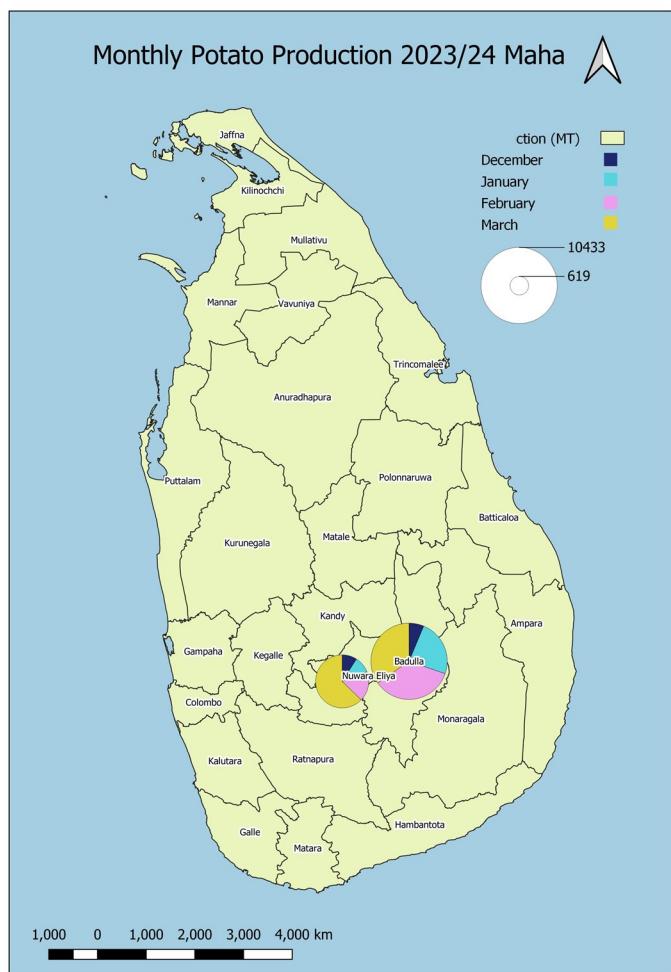
* Yala 2024 Production - Calculated based on the indicative target from Extension, DOA

Monthly Production



Potato : Monthly production pattern

- Expected production of Potato in 2024 would be 32% below compared to normal year production.
- Bulk production would be reached to the market from Nuwara Eliya and Badulla districts.
- Almost 75% of national potato requirement in year 2024 has to be imported, expecting maximum achievement of the Yala 2024 targets.

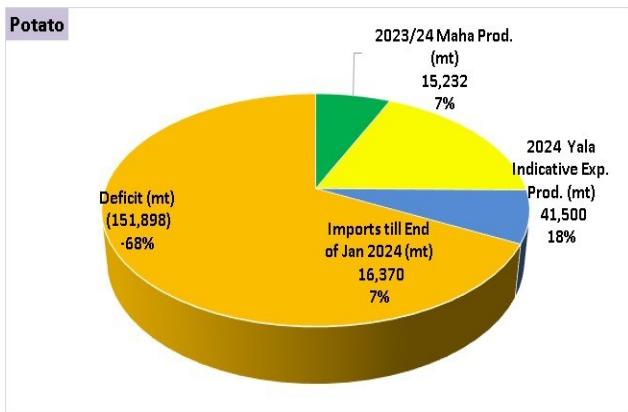


	Value (mt)
National Requirement	225,000
Maha 2023/24 expected production	15,232
Yala 2024 expected production (Indicative target)	41,500
Total Expected Production 2024	56,732
Imports as at end January 2024	16,370
National availability for 2024	73,102

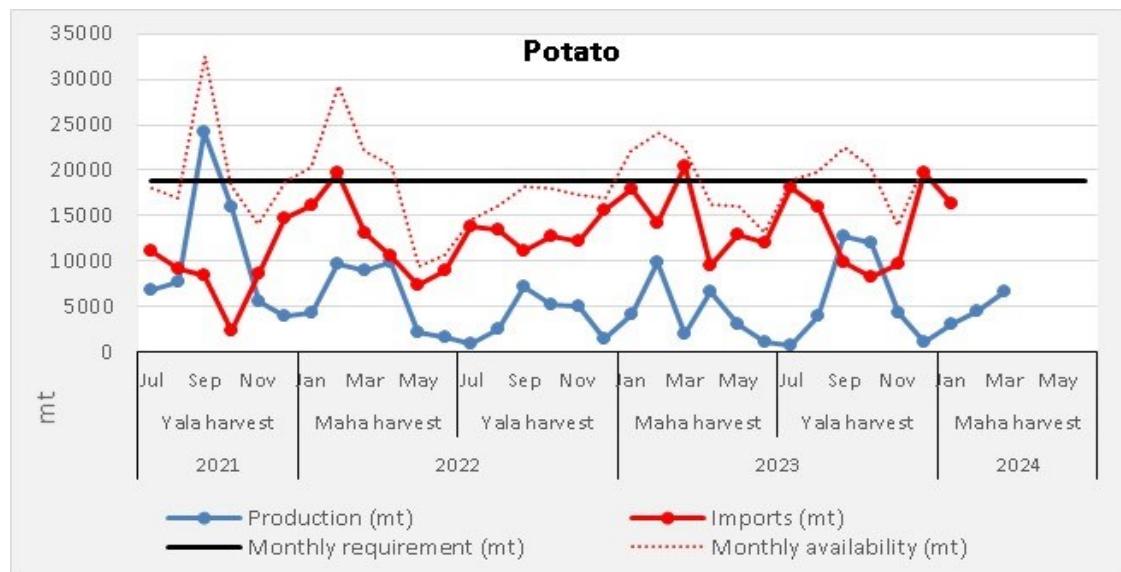
District wise harvesting schedule

Potato

Monthly Availability



Potato : Share of annual availability



Potato : Monthly Availability

Potato : Monthly Balance

Season	Month	Production (mt)	Imports (mt)	Monthly requirement (mt)	Monthly availability (mt)	Monthly Balance (mt)
Maha harvest 2023/24	Jan	3,003	16,370	18,750	19,373	623
	Feb	4,474		18,750	4,474	(13,653)
	Mar	6,638		18,750	6,638	(25,765)
	Apr	0		18,750	0	(44,515)
	May	0		18,750	0	(63,265)
	Jun	0		18,750	0	(82,015)

Assumption: No brought forward stocks from last year

Cowpea

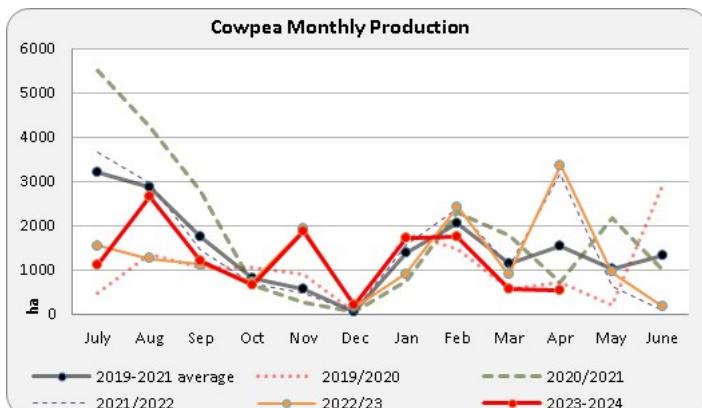
	Maha		Yala		Total		Annual Imports (mt)	Annual Requirement (mt)	Balance (mt)
	Ext. (ha)	Pro. (mt)	Ext. (ha)	Pro. (mt)	Ext. (ha)	Pro. (mt)			
General Situation	5,765	6,310	3,985	4,850	9,750	11,159	4,178	15,000	
Year 2024	8,367	4,544	10,000	10,000	18,367	14,544	1	15,000	(456)

Production up to end of April 2024

Imports till end of January 2024

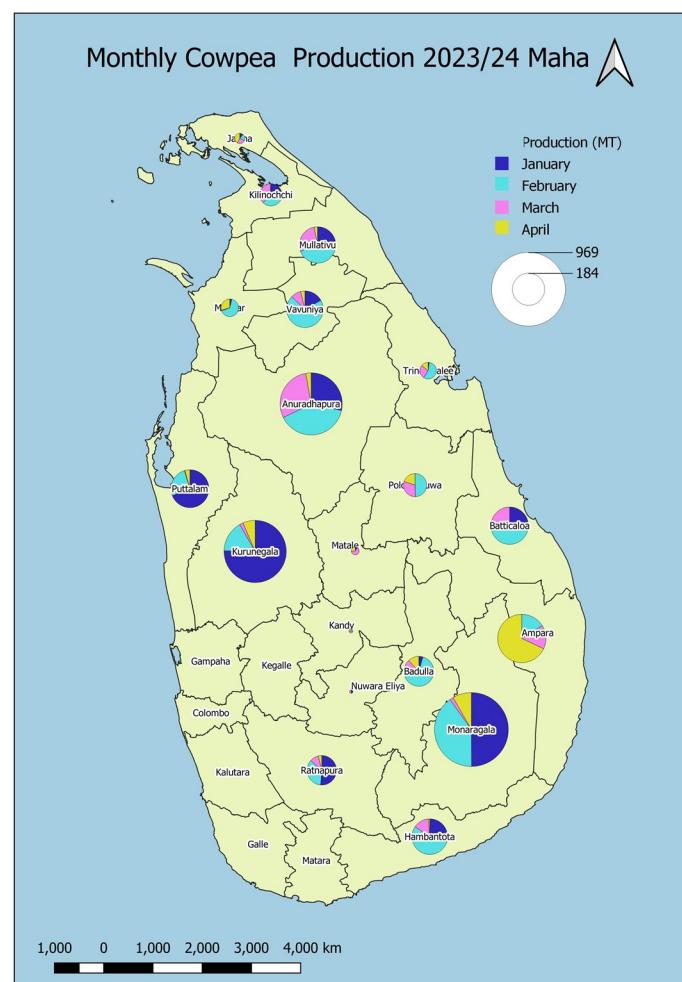
* Yala 2024 Production - Calculated based on the indicative target from Extension, DOA

Monthly Production



Cowpea : Monthly production pattern

- Cowpea production in 2024 would be decreased by 30% compared to a normal year production.
- Local production is available in the market from January mainly from Monaragala, Anuradhapura and Kurunegala districts.
- Imports have been restricted since 2020 November onwards.
- However, Cowpea production in Maha 2023/24 season would be sufficient to fulfill the national requirement up to end of March 2024.

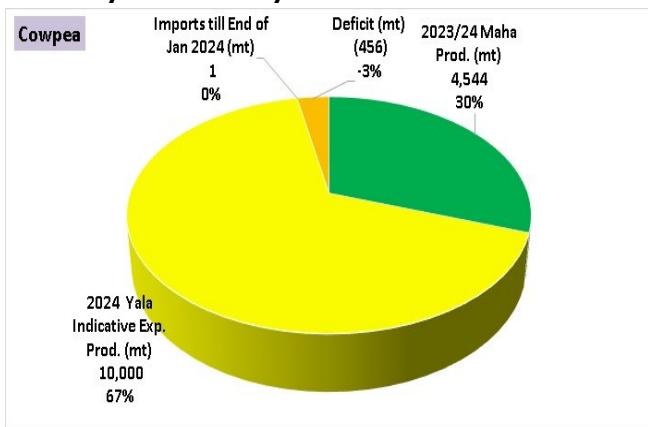


	Value (mt)
National Requirement	15,000
Maha 2023/24 expected production	4,544
Yala 2024 expected production (Indicative target)	10,000
Total Expected Production 2024	14,544
Imports as at end January 2024	1
National availability for 2024	14,545

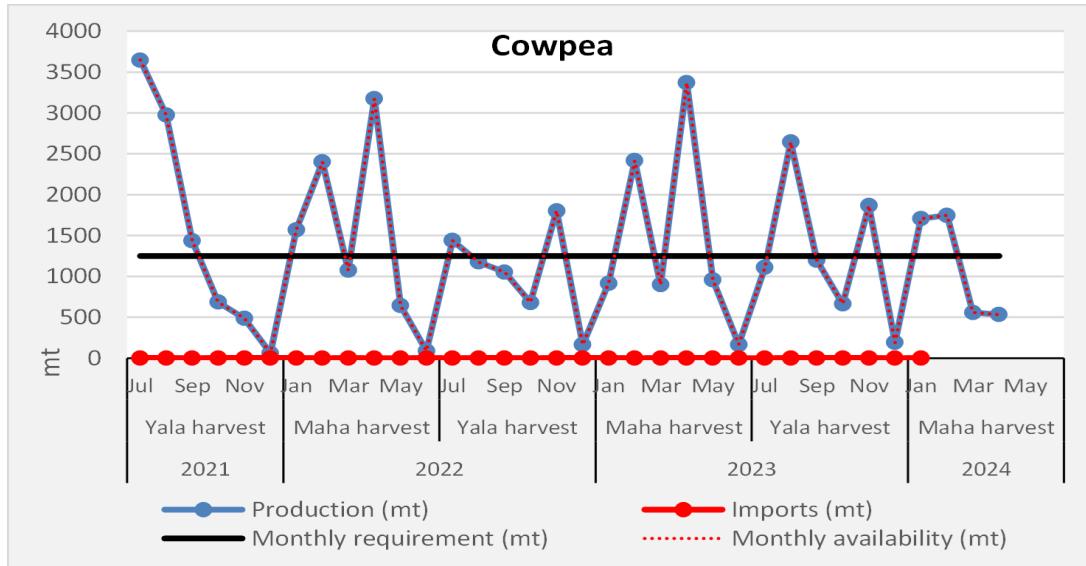
District wise harvesting schedule

Cowpea

Monthly Availability



Cowpea : Share of annual availability



Cowpea : Monthly Availability

Cowpea : Monthly Balance

Season	Month	Production (mt)	Imports (mt)	Monthly requirement (mt)	Monthly availability (mt)	Monthly Balance (mt)
Maha harvest 2023/24	Jan	1,705	1	1,250	1,706	456
	Feb	1,748		1,250	1,748	954
	Mar	559		1,250	559	263
	Apr	532		1,250	532	(456)
	May	0		1,250	0	(1,250)
	Jun	0		1,250	0	(1,250)

Assumption: No brought forward stocks from last year

Green gram

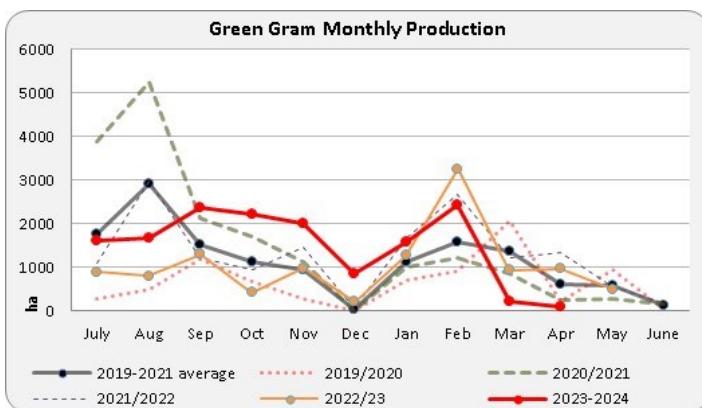
	Maha		Yala		Total		Annual Imports (mt)	Annual Requirement (mt)	Balance (mt)
	Ext. (ha)	Pro. (mt)	Ext. (ha)	Pro. (mt)	Ext. (ha)	Pro. (mt)			
General Situation	5,000	5,744	5,883	6,669	10,883	12,413	8,005	20,000	
Year 2024	6,637	4,535	59,096	32,667	65,733	37,202	-	20,000	17,202

Production up to end of April 2024

Imports till end of January 2024

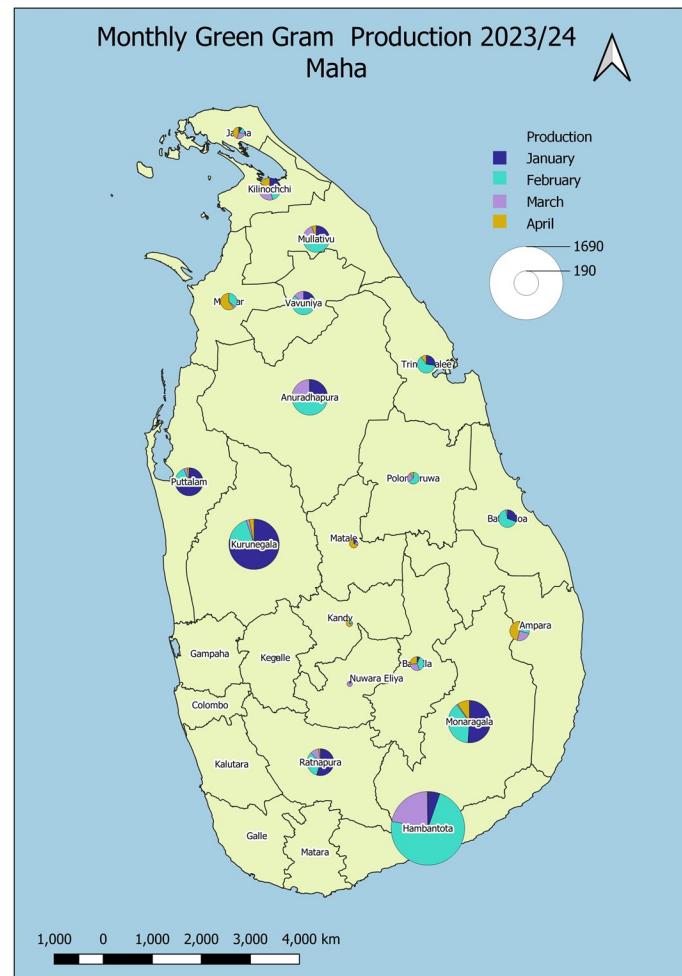
* Yala 2024 Production - Calculated based on the indicative target from Extension, DOA

Monthly Production



Green gram : Monthly production pattern

- Bulk production of Maha 2023/24 season is available from February onwards mainly from Hambantota, Kurunegala and Anuradhapura districts.
- Importation of green gram has been temporarily banned since September 2020.
- Maha 2023/24 production is not sufficient for the beginning of the year. However, bulk production from inter season green gram cultivation is expecting from End March onwards.

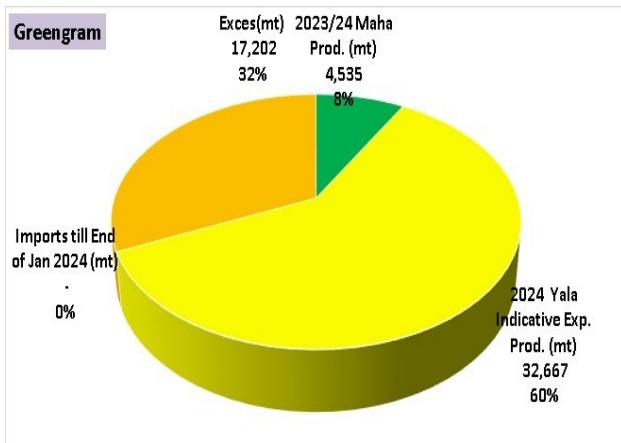


District wise harvesting schedule

	Value (mt)
National Requirement	20,000
Maha 2023/24 expected production	4,535
Yala 2024 expected production (Indicative target)	32,667
Total Expected Production 2024	37,202
Imports as at end January 2024	-
National availability for 2024	37,202

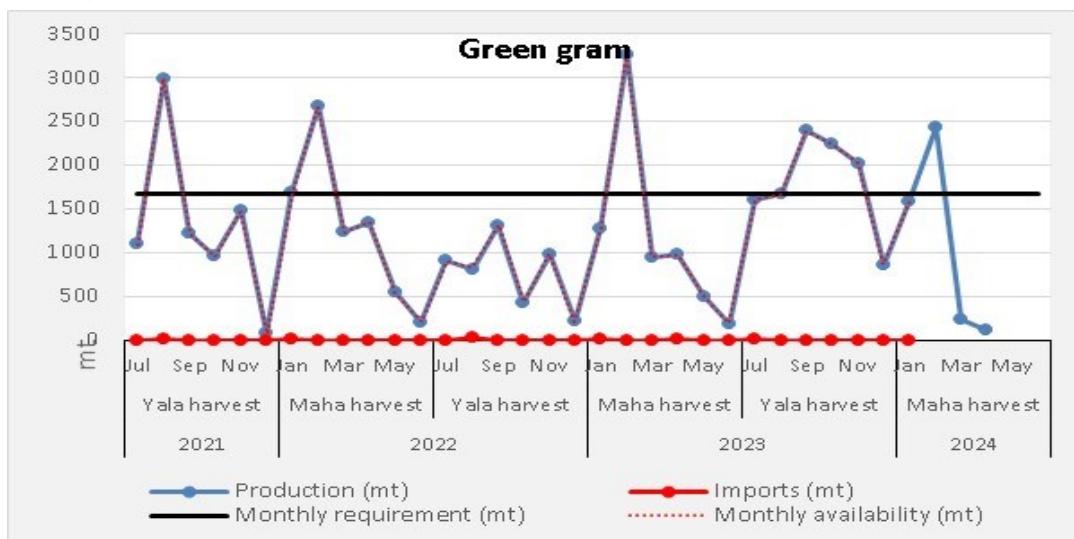
Green gram

Monthly Availability



Green gram : Share of annual availability

Green gram : Monthly Availability



Green gram : Monthly Balance

Season	Month	Production (mt)	Imports (mt)	Monthly requirement (mt)	Monthly availability (mt)	Monthly Balance (mt)
Maha harvest 2023/24	Jan	1,583	0	1,667	1,583	(84)
	Feb	2,429		1,667	2,429	762
	Mar	227		1,667	227	(677)
	Apr	114		1,667	114	(1,553)
	May			1,667		(1,667)
	Jun			1,667		(1,667)

Assumption: No brought forward stocks from last year

Black gram

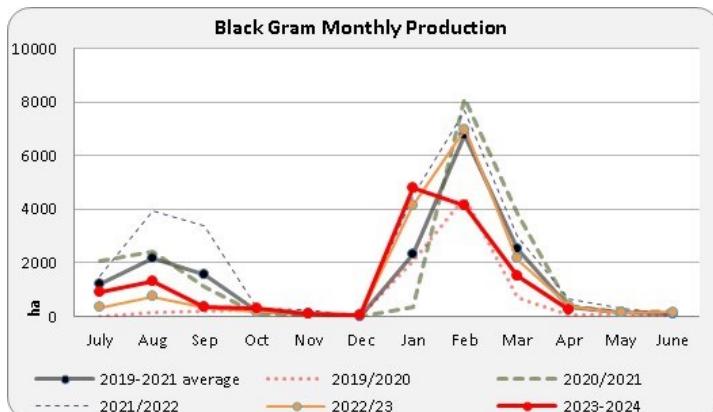
	Maha		Yala		Total		Annual Imports (mt)	Annual Requirement (mt)	Balance (mt)
	Ext. (ha)	Pro. (mt)	Ext. (ha)	Pro. (mt)	Ext. (ha)	Pro. (mt)			
General Situation	8,399	7,844	1,778	2,327	10,177	10,171	2,752	20,000	
Year 2024	15,021	10,703	4,000	4,000	19,021	14,703	0	20,000	(5,297)

Production up to end of April 2024

Imports till end of January 2024

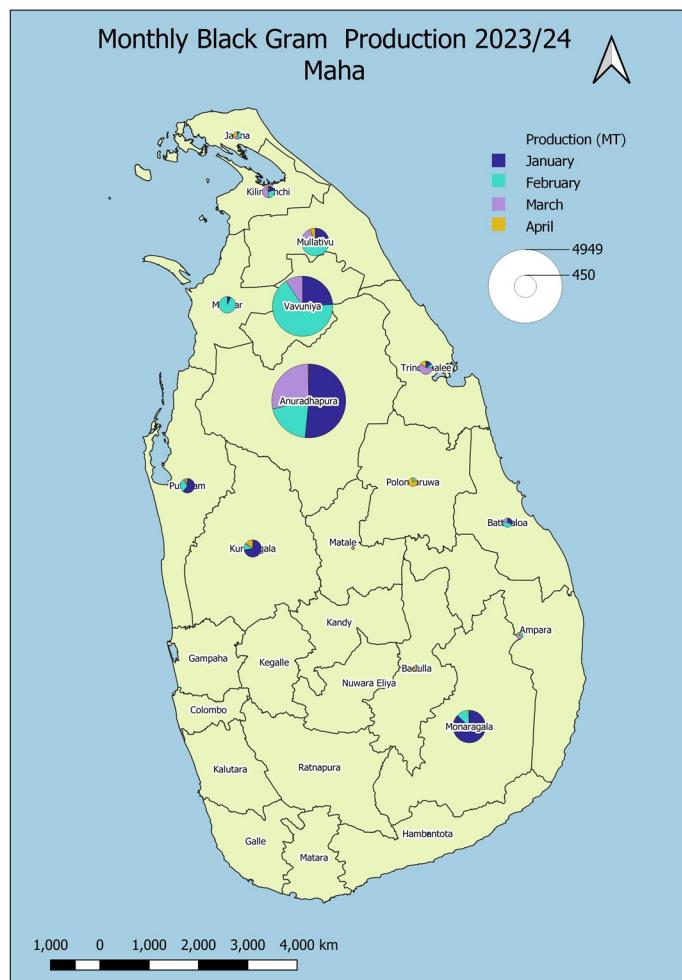
* Yala 2024 Production - Calculated based on the indicative target from Extension, DOA

Monthly Production



Black gram : Monthly production pattern

- Bulk production of Maha 2023/24 season which reached the market is mainly from Anuradhapura and Vavuniya districts.
- Importation of black gram has been temporarily banned since February 2020.
- Maha 2023/24 black gram production is sufficient for local consumption till next season harvest arrives the market.

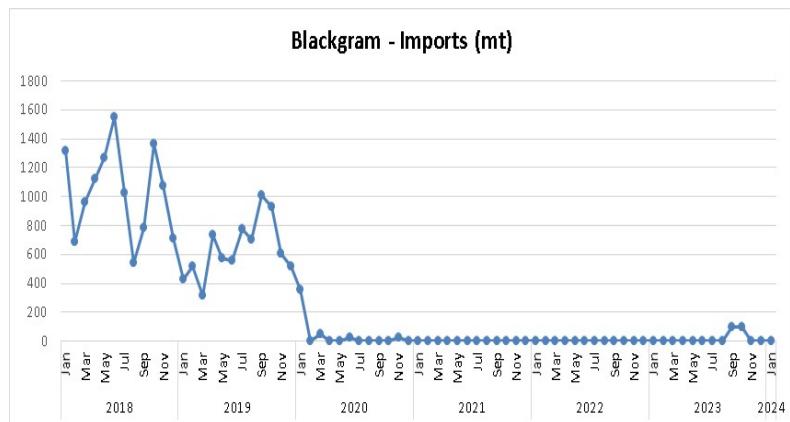
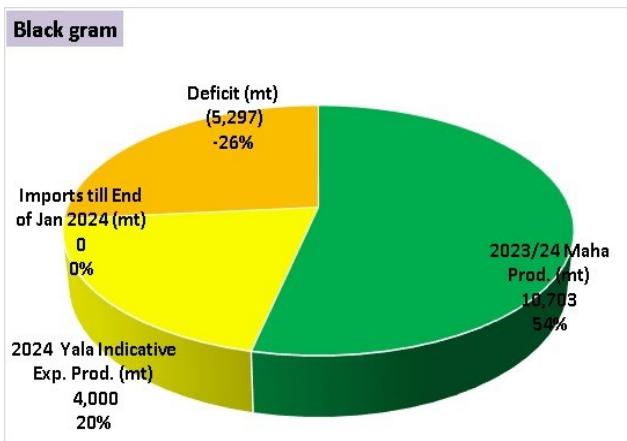


District wise harvesting schedule

	Value (mt)
National Requirement	20,000
Maha 2023/24 expected production	10,703
Yala 2024 expected production (Indicative target)	4,000
Total Expected Production 2024	14,703
Imports as at end January 2024	-
National availability for 2024	14,703

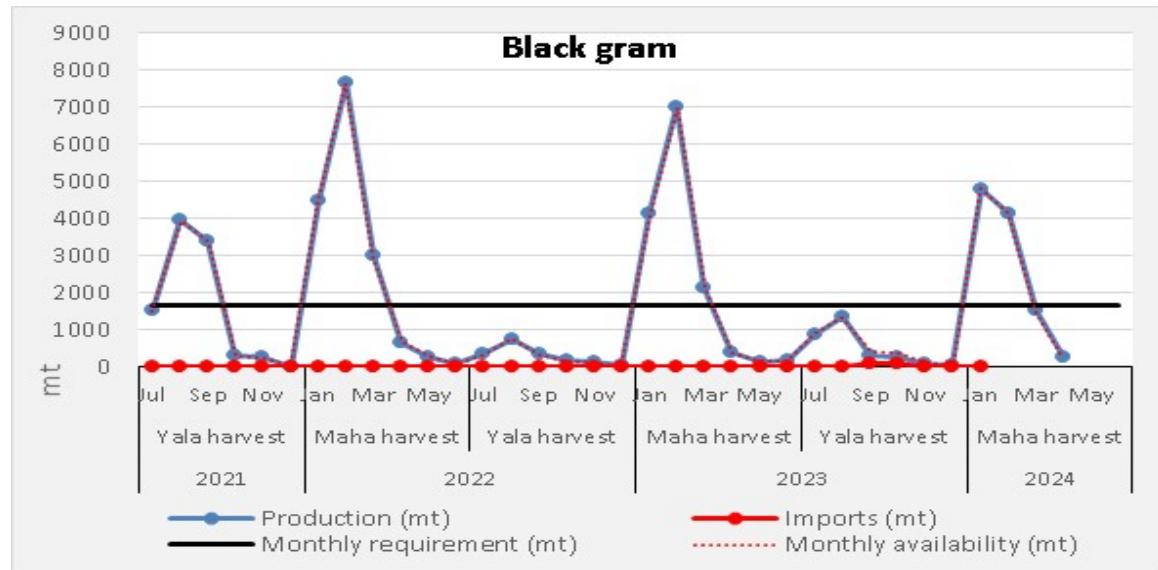
Black gram

Monthly Availability



Black gram : Share of annual availability

Black gram : Monthly imports



Black gram : Monthly Availability

Black gram : Monthly Balance

Season	Month	Production (mt)	Imports (mt)	Monthly requirement (mt)	Monthly availability (mt)	Monthly Balance (mt)
Maha harvest 2023/24	Jan	4,795	0	1,667	4,795	3,128
	Feb	4,142		1,667	4,142	5,604
	Mar	1,512		1,667	1,512	5,449
	Apr	253		1,667	253	4,035
	May	0		1,667	0	2,369
	Jun	0		1,667	0	702

Assumption: No brought forward stocks from last year

Ground Nut

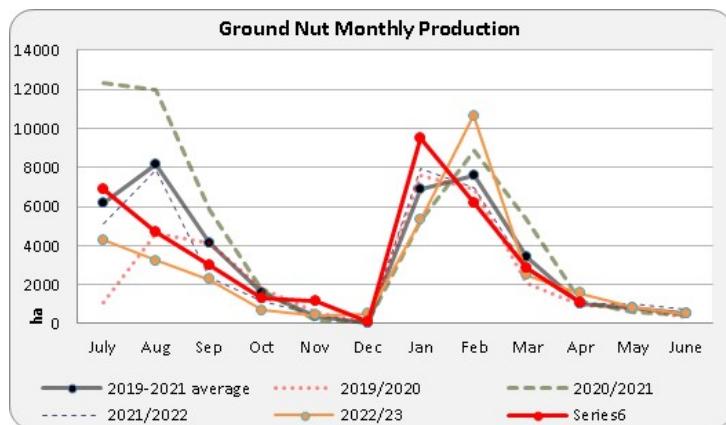
	Maha		Yala		Total		Annual Imports (mt)	Annual Requirement (mt)	Balance (mt)
	Ext. (ha)	Pro. (mt)	Ext. (ha)	Pro. (mt)	Ext. (ha)	Pro. (mt)			
General Situation	10,845	19,999	6,134	12,603	16,978	32,602	1,272	35,000	
Year 2024	12,655	19,686	7,500	14,980	20,155	34,666	19	35,000	(315)

Production up to end of April 2024

Imports till end of January 2024

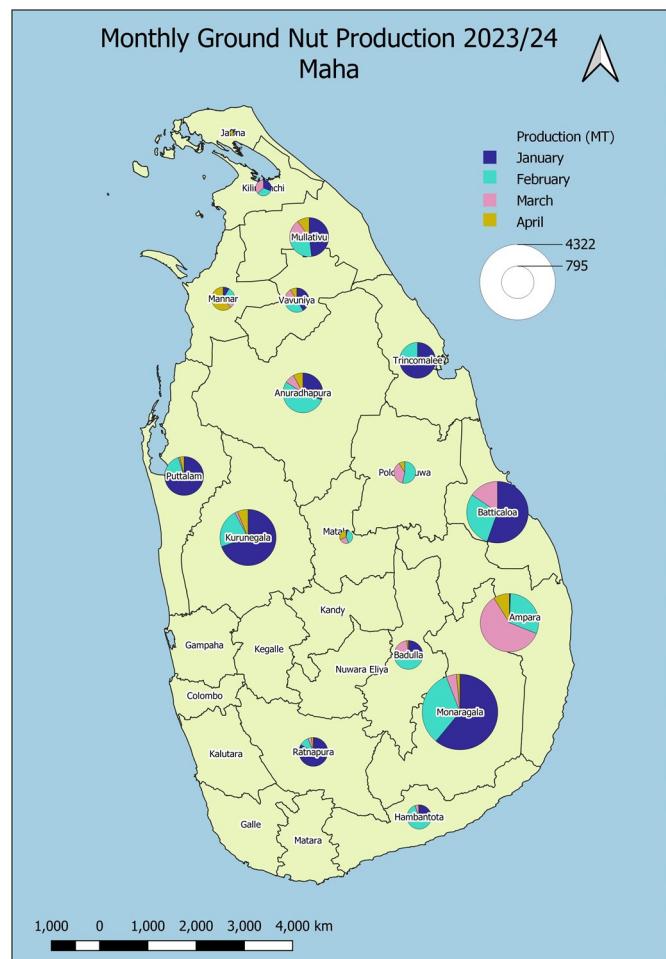
* Yala 2024 Production - Calculated based on the indicative target from Extension, DOA

Monthly Production



Ground nut : Monthly production pattern

- Bulk harvest which available at the market from Moneragala, Batticaloa and Kurunegala districts.
- Ground nut Maha 2023/24 production is above the national requirement till the Yala harvest will appear into the market.

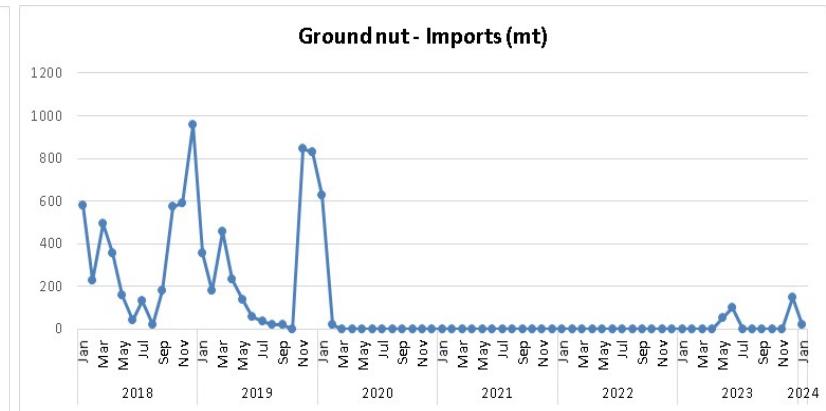
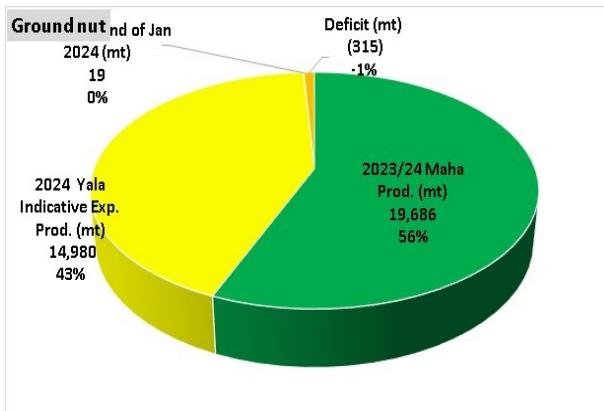


	Value (mt)
National Requirement	35,000
Maha 2023/24 expected production	19,686
Yala 2024 expected production (Indicative target)	14,980
Total Expected Production 2024	34,666
Imports as at end January 2024	19
National availability for 2024	34,685

District wise harvesting schedule

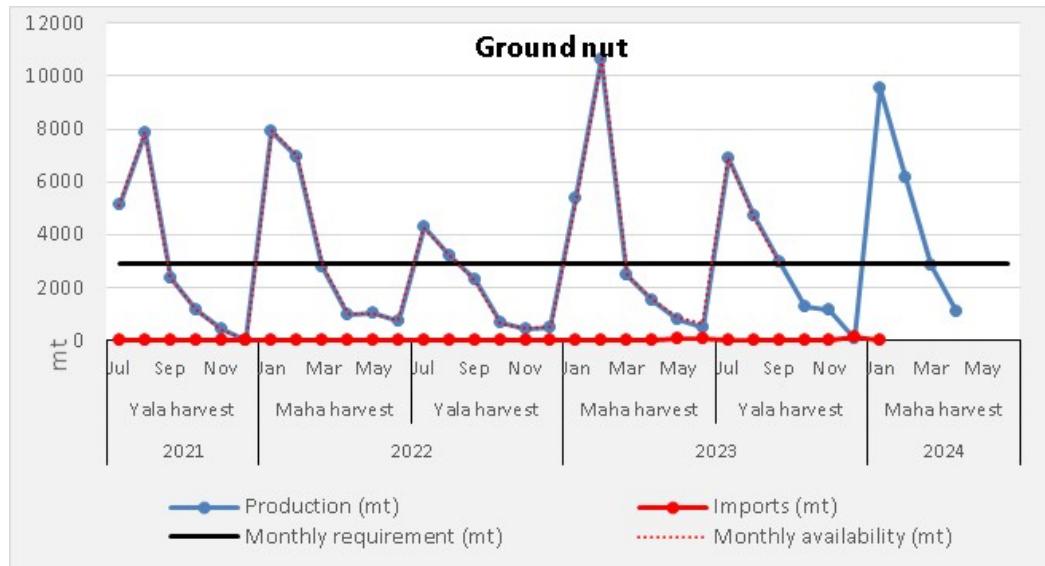
Ground Nut

Monthly Availability



Ground nut : Share of annual availability

Ground nut : Monthly imports



Ground nut : Monthly Availability

Ground nut : Monthly Balance

Season	Month	Production (mt)	Imports (mt)	Monthly requirement (mt)	Monthly availability (mt)	Monthly Balance (mt)
Maha harvest 2023/24	Jan	9,539	19	2,917	9,558	6,642
	Feb	6,182		2,917	6,182	9,907
	Mar	2,865		2,917	2,865	9,855
	Apr	1,100		2,917	1,100	8,039
	May	0		2,917	0	5,122
	Jun	0		2,917	0	2,205

Assumption: No brought forward stocks from last year

Soy Bean

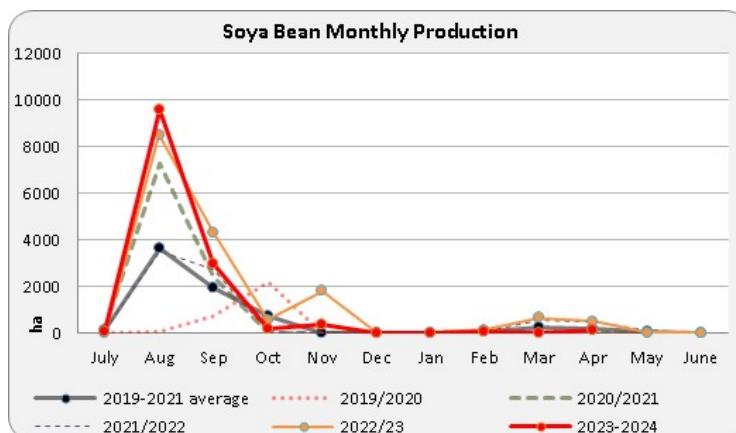
	Maha		Yala		Total		Annual Imports (mt)	Annual Requirement (mt)	Balance (mt)
	Ext. (ha)	Pro. (mt)	Ext. (ha)	Pro. (mt)	Ext. (ha)	Pro. (mt)			
General Situation	270	438	1,699	3,654	1,969	4,092	223,597	225,000	
Year 2024	851	199	7,000	17,500	7,851	17,699	23,214	225,000	(184,087)

Production up to end of April 2024

Imports till end of January 2024

* Yala 2024 Production - Calculated based on the indicative target from Extension, DOA

Monthly Production

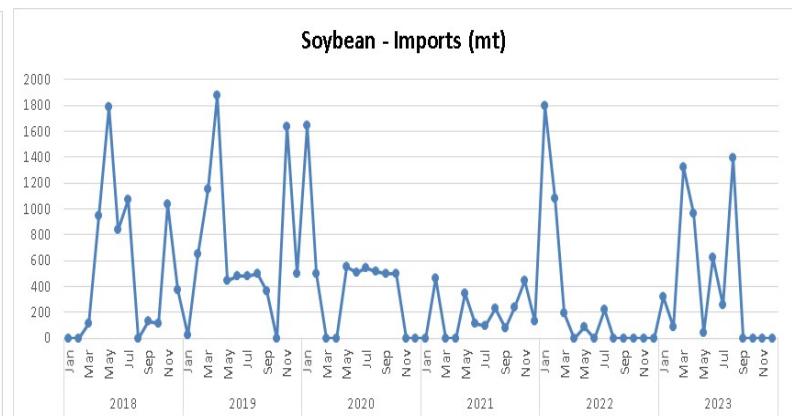
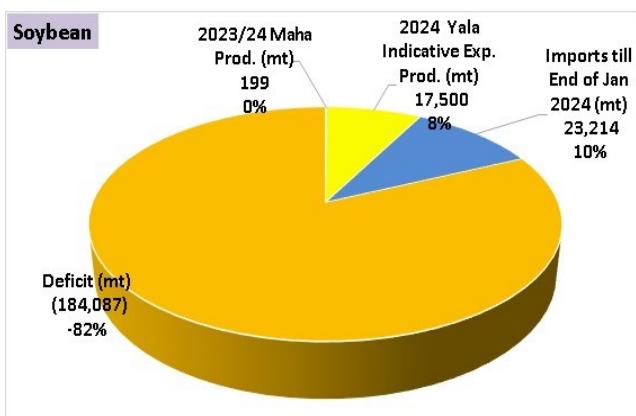


- Total imports need for normal food and animal feed as at end January 2024 is 224,801 mt.

	Value (mt)
National Requirement	225,000
Maha 2023/24 expected production	199
Yala 2024 expected production (Indicative target)	17,500
Total Expected Production 2024	17,699
Imports as at end January 2024	23,214
National availability for 2024	40,913

Soy bean : Monthly production pattern

Monthly Availability



Soy bean : Share of annual availability

Soy bean : Monthly imports

Finger millet

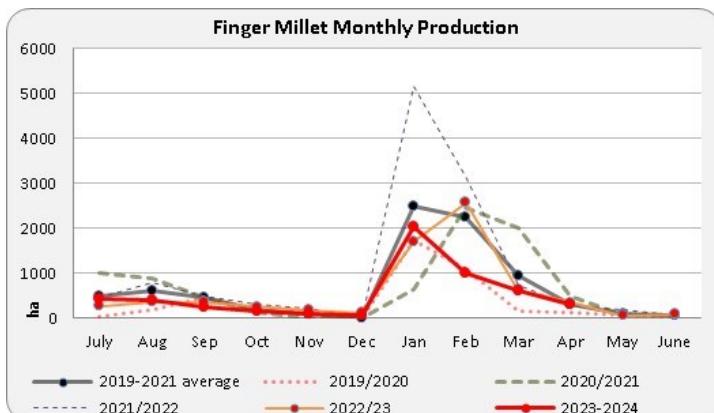
	Maha		Yala		Total		Annual Imports (mt)	Annual Requirement (mt)	Balance (mt)
	Ext. (ha)	Pro. (mt)	Ext. (ha)	Pro. (mt)	Ext. (ha)	Pro. (mt)			
General Situation	4,318	5,293	1,134	1,693	5,452	6,986	1,629	11,000	
Year 2024	4,910	3,935		-	4,910	3,935	0	10,000	(6,065)

Production up to end of April 2024

Imports till end of January 2024

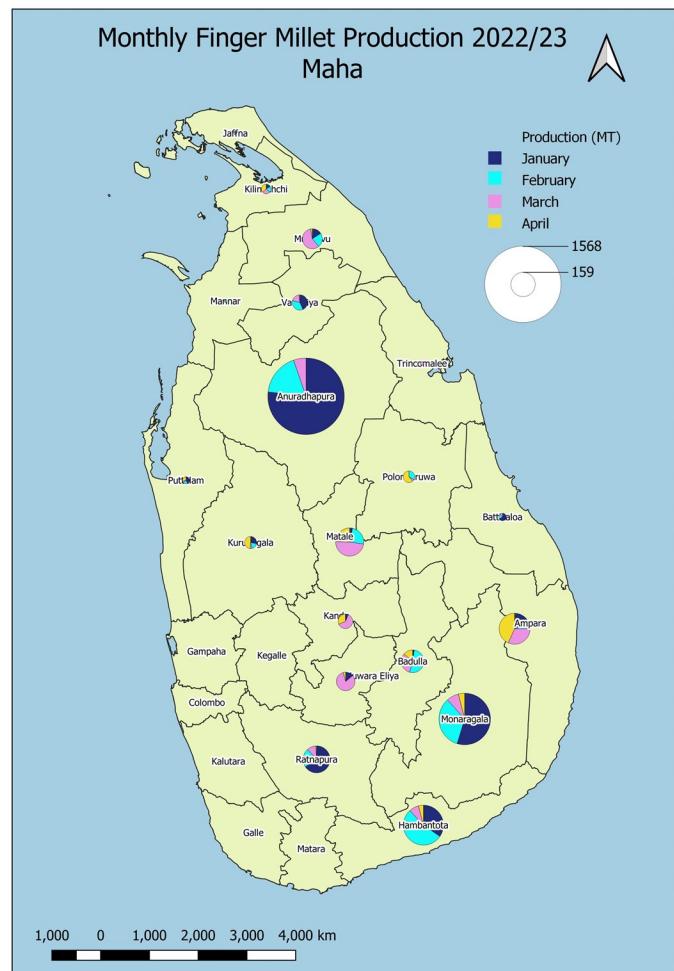
* Yala 2024 Production - Calculated based on the indicative target from Extension, DOA

Monthly Production



Finger millet : Monthly production pattern

- Bulk harvest is available from January onwards in Anuradhapura and Monaragala districts.
- Local finger millet production in Maha 2023/24 season would be sufficient till end April.

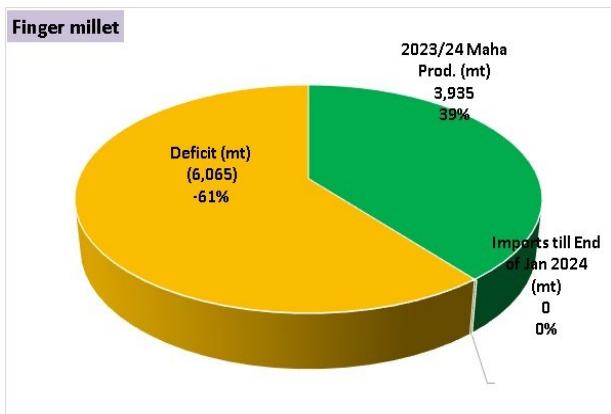


District wise harvesting schedule

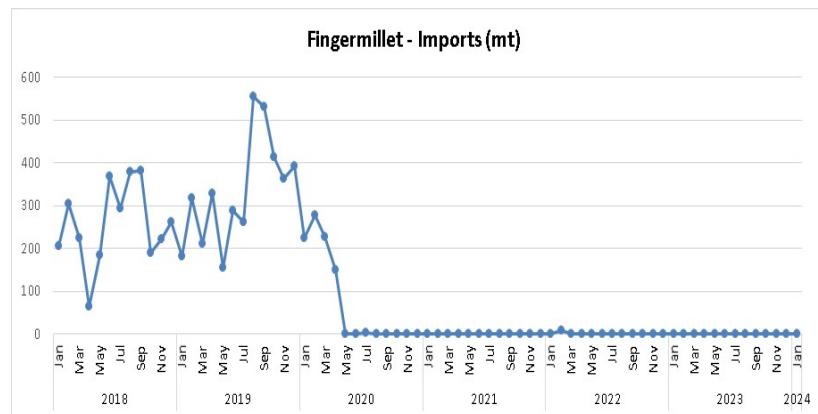
	Value (mt)
National Requirement	10,000
Maha 2023/24 expected production	3,935
Yala 2024 expected production (Indicative target)	-
Total Expected Production 2024	3,935
Imports as at end January 2024	-
National availability for 2024	3,935

Finger millet

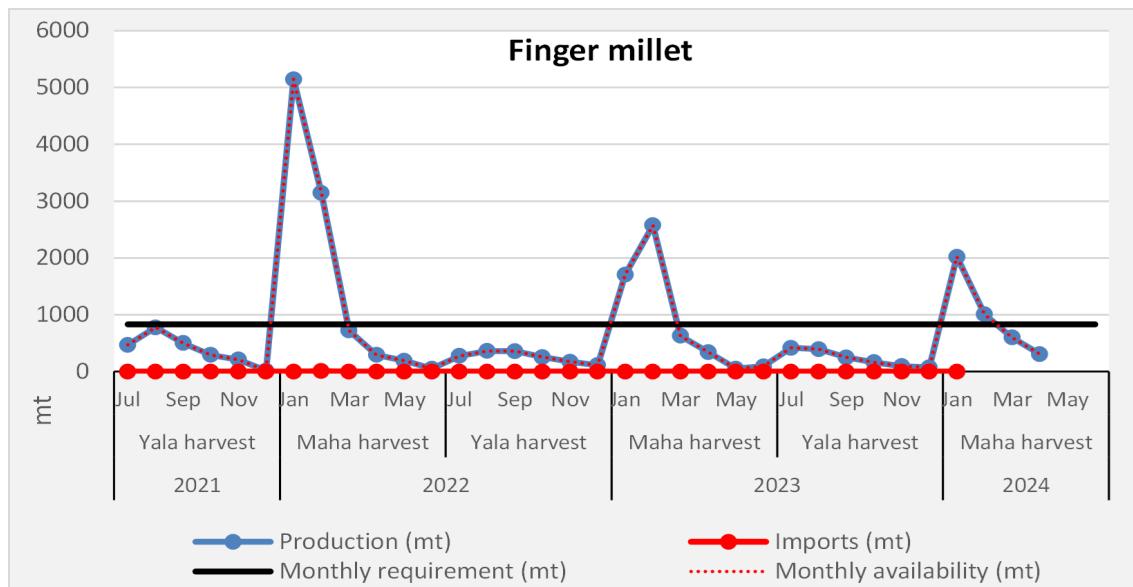
Monthly Availability



Finger millet : Share of annual availability



Finger millets : Monthly imports



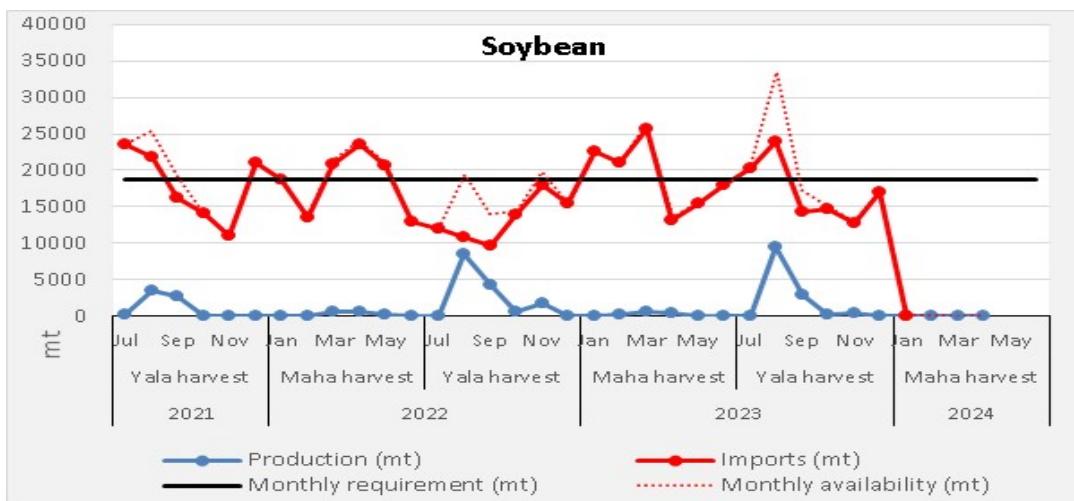
Finger millet : Monthly Availability

Finger millet : Monthly Balance

Season	Month	Production (mt)	Imports (mt)	Monthly requirement (mt)	Monthly availability (mt)	Monthly Balance (mt)
Maha harvest 2023/24	Jan	2,020	0	833	2,020	1,187
	Feb	1,008	0	833	1,008	1,361
	Mar	600	0	833	600	1,128
	Apr	308	0	833	308	603
	May	0	0	833	0	(231)
	Jun	0	0	833	0	(833)

Assumption: No stocks brought forward from last year

Soy Bean



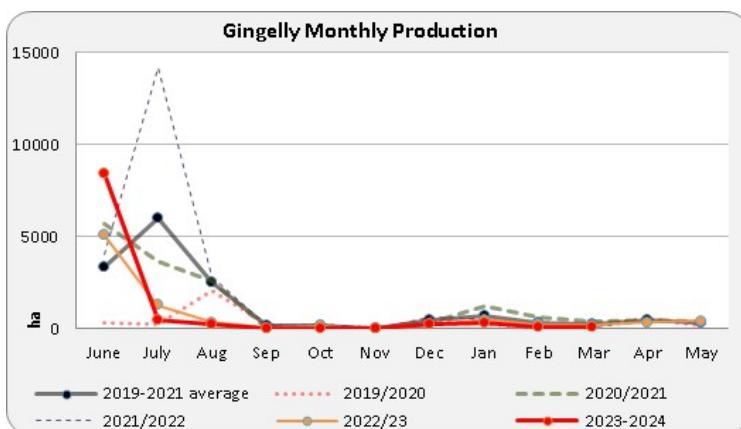
Soy bean : Monthly Availability

Season	Month	Production (mt)	Imports (mt)	Monthly requirement (mt)	Monthly availability (mt)	Monthly Balance (mt)
Maha harvest 2023/24	Jan	24	23,214	18,750	23,238	4,488
	Feb	76		18,750	76	(18,674)
	Mar	1		18,750	1	(18,749)
	Apr	99		18,750	99	(18,651)
	May			18,750	0	(18,750)
	Jun			18,750	0	(18,750)

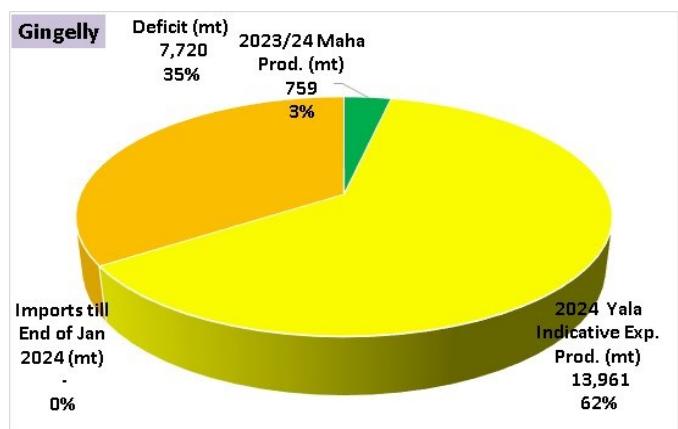
Soy bean : Monthly Balance

Gingelly

Monthly Production



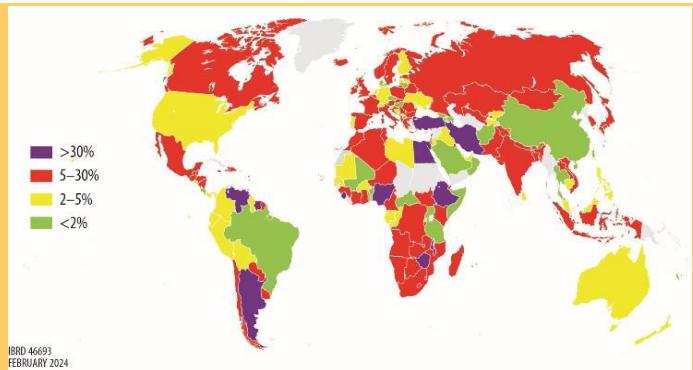
Gingelly : Monthly production pattern



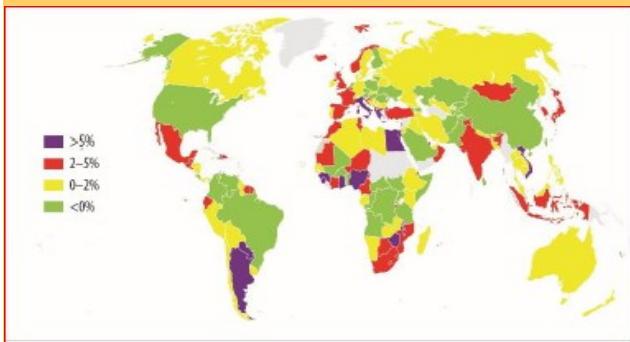
Soy bean : Share of annual availability

World Food Price Inflation

- Domestic food price inflation remains high in low-, middle-, and high-income countries.
- In early 2024, global commodity markets have maintained relative stability, with wheat, maize, and soybean export prices hitting their lowest in two years, although rice prices are almost one-third higher than a year ago because of El Niño-induced production shortfalls and export restrictions imposed by India.
- The agriculture and export price indices closed 3 percent and 10 percent higher, respectively, while the cereal price index closed 2 percent lower.
- Among cereals, maize and wheat prices closed 3 percent and 1 percent lower, while rice prices closed at the same level as two weeks ago.
- On a year-on-year basis, maize prices are 35 percent lower, and wheat prices are 21 percent lower.



Food Inflation Heat Map



- Rice prices on the other hand are 26 percent higher. Compared to January 2020, maize prices are 12 percent higher, wheat prices are 6 percent higher, and rice prices are 51 percent higher.
- In Sri Lanka Food inflation (Y-o-Y) accelerated to 3.5% in February 2024 from 3.3% in January 2024, whereas Non-Food inflation (Y-o-Y) decelerated to 7.0% in February 2024 from 7.9% in January 2024.

Real Food Inflation Heat Map

Country	Nominal food inflation (%YoY)	Country	Real food inflation (%YoY)
Argentina	251	Argentina	40
Lebanon	208	Zimbabwe	26
Venezuela	91	Egypt	18
Türkiye	70	Lebanon	15
Zimbabwe	60	Viet Nam	12
Sierra Leone	57	Palestine	9
Egypt	48	Malawi	9
Malawi	44	Haiti	7
Iran, Islamic Republic of	39	Guinea	6
Suriname	36	Greece	6

Sources - Food Security Update - The World Bank, February 15, 2024

Press Release Inflation - Central Bank of Sri Lanka (CBSL), February 29, 2024

Far East Asia- Situation

- Across the sub-region, domestic prices of rice showed mixed trends in January 2024 and were generally above their year-earlier levels.
- In Thailand, wholesale rice prices increased for the second consecutive month in January, and were 50 percent above their year-earlier levels, after the steady increase between February and August 2023.
- In Myanmar, domestic rice prices of the widely consumed “Emata” rice increased to record levels in January, reflecting a below-average 2023 main paddy output, which follows a reduced aggregate production in 2022.
- In India and China (mainland), domestic rice prices were generally stable, reflecting adequate market availability.
- In the net importing countries, retail prices of rice generally increased in January 2024.
- In the Philippines, retail prices of rice increased to record levels in January on concerns about the impact of dry conditions on the ongoing 2023 secondary season crop.
- Concerns over dry weather conditions also supported prices in Indonesia, where national average retail prices of rice increased to record levels in December 2023, amid expectations of a reduced output for the 2023 third crop.
- In Sri Lanka, retail prices of rice increased seasonally ahead of the 2024 main “Maha” crop.

Source -

Food Price Monitoring Analysis - FAO, (February, 2024)



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**Socio Economics and
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Data Sources

- Past crop production data - Department of Census and Statistics
- Area and production data in Maha 2023/24 season - Department of Agriculture (Crop Forecast)
- Indicative targets for Yala 2024 season - Extension and Training Centre, Department of Agriculture
- Import & Export data - Sri Lanka Customs
- Price data - Hector Kobbakaduwa Agrarian Research & Training Institute

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