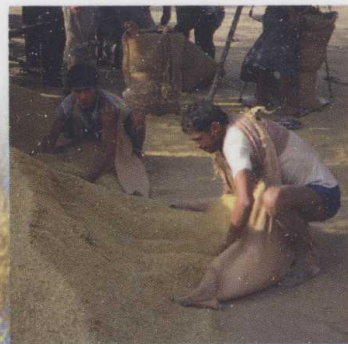
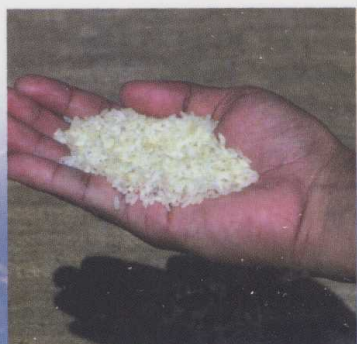


THE RICE CRISIS

MARKETS, POLICIES AND FOOD SECURITY



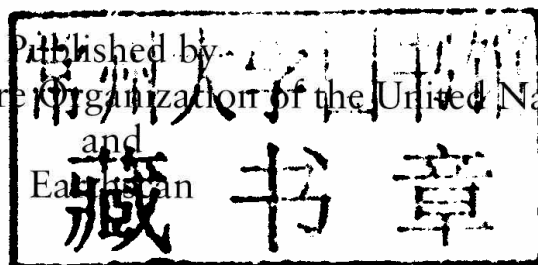
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Markets, Policies and Food Security

Edited by David Dawe

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Foreword

The spike in food prices in 2007–2008 was the biggest spike on world food markets since the world food crisis of 1973–1975. Poor people often spend as much as 40 per cent of their incomes on staple foods – thus, a large price shock is a major blow to the effective purchasing power of those who are food insecure, and the crisis caused great hardship to them in many countries around the world. But food prices on world markets eventually declined in the second half of 2008, and although domestic prices remain higher than before the crisis in some countries, the crisis has largely passed. Since large food price spikes seem to occur about once every 30 to 35 years, is there any scope for an analysis now? What is the usefulness of analysing the most recent world food crisis now if we don't have to deal with a similar crisis until 2040?

While it is true that large price spikes on world markets have occurred relatively infrequently in the past, there is some reason to think this may change in the future. First, biofuel demand has strengthened linkages between world energy and agricultural markets. Because world energy markets are so much larger than world agricultural markets, they may drive agricultural markets in the future. And world energy markets have historically been much more volatile than world food markets, creating the possibility that world food markets will become more volatile in the future. Second, climate change is expected to result in an increased frequency of severe climatic events that may reverse the historical trend of the past few decades to more stable cereal production and yields. Thus, it is important to understand more about the most recent world food crisis to help us potentially deal better with similar shocks that may occur in the future.

While there were price surges for all three of the world's major cereals (rice, wheat and maize) in the years 2006 to 2008, it is widely acknowledged that the spike in world rice prices had a fundamentally different explanation from the spikes in wheat and maize prices. Thus, while the world rice crisis was undoubtedly shaped to some extent by the same broad events that contributed to price spikes in other world food markets, the world rice economy took on a dynamic of its own, especially in early 2008. In particular, government policies were crucial, both in terms of their 'spill-over' effects on world markets, and in terms of their heterogeneous effects on domestic prices.

With a view to designing better policies, and in response to the needs expressed by many countries to learn how to deal more appropriately with shocks to international markets in an increasingly globalized environment, the Food and Agriculture Organization of the United Nations (FAO) has supported both a workshop and the publication of this book that gathers together insights from many different experts from around the world. The workshop brought together participants from a wide range of organizations: private traders, research institutes, international organizations and government agencies responsible for policy implementation. The book explores in detail the wide range of different policies employed by various countries before, during and in the immediate aftermath of the rice crisis. Different policies led to different results, thereby providing invaluable lessons for the future about dealing with food price shocks. It is my hope that this publication will contribute to a more informed debate on issues that are of fundamental importance to the food security of the hundreds of millions of undernourished people around the globe.

Kostas Stamoulis
Director, Agricultural Development Economics Division
Food and Agriculture Organization of the United Nations

Preface

World rice prices spiked in early 2008, with prices tripling in the span of just a few months. This crisis on the world market led to surges in domestic rice prices in many countries, leading to substantial effects on the poor in countries where rice is the staple food for consumers and the crop most widely grown by farmers.

Because rice is such an important crop for the world's poor, FAO felt that it was important to understand the origins of the world rice crisis, the nature of domestic policy responses to the crisis, and to attempt to answer the question 'Can the next rice crisis be prevented?'. In order to achieve these objectives, FAO convened a workshop in Chiang Mai, Thailand, in February 2009 that gathered together many different types of experts on the rice economy. This book has its origins in the discussions held during that workshop.

The purpose of the book is to stimulate and facilitate informed discussion. Given the effects of the world rice crisis on the poor, such debate is essential to helping countries manage such crises better in the future. But none of the statements in the book necessarily represent an official position of FAO, or any other organization that participated in the workshop.

One group of experts who participated in the workshop make their living in the international rice trade. While the rice traders who joined the workshop did not contribute any papers to this book, they did make presentations to the group during the workshop and contributed many important insights during the discussions. In this regard, a tremendous vote of thanks is due to Vichai Sriprasert, Sumeth Laomorphorn and Porntiwa Tanaphong for keeping everyone's feet firmly planted on the ground.

The other experts at the workshop hailed from a wide range of research, policy and government organizations around the world at both international and national levels. These experts prepared draft presentations or papers specifically for this workshop, but then updated and revised them substantially afterwards in order to create this book. Thanks are due to these people who contributed their time, expertise and knowledge of various aspects of the world's rice economy to this book. Thanks are also due to several authorities who shared their expertise during the workshop but did not contribute a paper to this volume: Zhou Hui (State Administration of Grain, China) and Dr Park

Dong-Kyu (Korea Rural Economic Institute).

The workshop would not have run as smoothly as it did without the excellent planning and logistical support provided over the span of several months, before, during and after the workshop, by Truchai Sodsoon of FAO's Regional Office for Asia and the Pacific and Juejan Tangtermthong of the Agricultural and Food Marketing Association for Asia and the Pacific (AFMA). Their support is very gratefully acknowledged. Editorial support from Adam Barclay in preparing some of the chapters is also gratefully acknowledged.

The workshop would not have been held at all without the intellectual support and encouragement from He Changchui, Deputy Director General for Operations at FAO; Hiroyuki Konuma, Assistant Director General and Regional Representative of FAO's Regional Office for Asia and the Pacific (RAP); Kostas Stamoulis, Director of FAO's Agricultural Development Economics Division (ESA) in Rome; Keith Wiebe, Deputy Director of ESA; Jairo Castaño, Senior Statistician at FAO RAP; and Dorjee Kinlay, Economist in ESA, who first suggested that we hold a workshop on this topic. Their inputs are sincerely valued.

Financial support from FAO, and from the organizations that allowed their staff members to take time off from their other duties and supported their travel in whole or in part, was very much appreciated by all the participants.

Finally, I would like to thank my family for their love and support, and for tolerating my continuing interest in anything to do with rice.

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List of Acronyms and Abbreviations

AFET	Agricultural Futures Exchange of Thailand
AFMA	Agricultural and Food Marketing Association for Asia and the Pacific
AFSR	ASEAN Food Security Reserve
ARI	Africa Rice Initiative
ASEAN	Association of Southeast Asian Nations
BAAC	Bank for Agriculture and Agricultural Cooperatives
BULOG	Badan Urusan Logistik
CAGR	compound average growth rate
CARP	Comprehensive Agrarian Reform Program
CBOT	Chicago Board of Trade
CCP	Cabinet Committee on Prices
CCT	conditional cash transfer
CFA	Communauté financière d'Afrique (Financial Community of Africa)
CGD	Center for Global Development
CIMMYT	International Maize and Wheat Improvement Center
CIP	Central Issue Price
CNF	cost and freight
CPI	consumer price index
CRS	Catholic Relief Services
CRTC	Council on Rice Trade Cooperation
CV	coefficient of variation
DAP	diammonium phosphate
EAERR	East Asia Emergency Rice Reserve
ECA	Essential Commodity Act
EEP	Export Enhancement Program
EP	Essential Priority
ES	exportable surplus
ESA	Agricultural Development Economics Division (FAO)
FAF	Farmer Assistance Fund

FAO	Food and Agriculture Organization of the United Nations
FAPRI	Food and Agriculture Policy Research Institute
FCI	Food Corporation of India
FCMO	Farmers' Central Market Organization
FFE	Food for Education
FFW	Food for Work
FIELDS	Fertilizer, Infrastructure and Irrigation, Extension and Education, Loans, Drying and other Post-harvest Facilities, and Seeds
FM	Flour Mills
FOB	free on board
FPC	Fair Price Card
GATT	General Agreement on Tariffs and Trade
GDP	gross domestic product
GFI	government financial institution
GPP	government purchase price
G-to-G	government-to-government
GR	Gratuitous Relief
GVA	gross value added
HCMC	Ho Chi Minh City
HH	household
ICB	international commodity body
IEA	International Energy Agency
IFAD	International Fund for Agricultural Development
IFPRI	International Food Policy Research Institute
IGG	intergovernmental group
IMF	International Monetary Fund
IRFSS	international rice food security system
IRRI	International Rice Research Institute
LEI	Large Employee Industries
LGU	local government unit
MA	minimum access
MAFF	Ministry of Agriculture, Forestry and Fisheries
MARD	Ministry of Agriculture and Rural Development
MDG	Millennium Development Goal
MEP	minimum export price
MLR	minimum lending rate
MMA	minimum market access
MOC	Ministry of Commerce
MOIT	Ministry of Industry and Trade
MOMAGRI	Mouvement pour une Organisation Mondiale de l'Agriculture (Movement for a World Agriculture Organization)
MoP	muriate of potash
MOU	memorandum of understanding
MRD	Mekong River Delta

MSP	minimum support price
MSR	minimum stock requirement
MV	modern variety
NFA	National Food Authority
NPC	nominal protection coefficient
NRA	nominal rate of assistance
OECD	Organisation for Economic Co-operation and Development
OMS	Open Market Sales
ON	Office du Niger
ONASA	Office Nationale de la Securite Alimentaire (Benin)
OP	Other Priority
OPEC	Organization of the Petroleum Exporting Countries
OREC	Organization of Rice Exporting Countries
ORS	Office Riz-Segou
PDS	Public Distribution System
PFDS	Public Food Grain Distribution System
PM	prime minister
PRRS	porcine reproductive and respiratory syndrome
PWO	Public Warehouse Organization
RAP	Regional Office for Asia and the Pacific (FAO)
RER	real exchange rate
RMA	Rice Millers' Association
RMR	regular milled rice
RRD	Red River Delta
SBS	simultaneous-buy-and-sell
SIMA	Systeme d'Informations sur le Marche Agricole (Niger)
SIM-C	System d'Information sur les Marches Cerealiers (Burkina Faso)
TE	triennium ending
TFP	total factor productivity
TPDS	Targeted Public Distribution System
TR	Test Relief
TSP	triple superphosphate
URAA	Uruguay Round Agreement on Agriculture
USDA	United States Department of Agriculture
USTR	United States Trade Representative
VAR	vector autoregressive
VAT	value added tax
VFA	Viet Nam Food Association
VGd	Vulnerable Group Development
VGf	Vulnerable Group Feeding
WARDA	West African Rice Development Authority
WFP	World Food Programme (United Nations)
WMR	well-milled rice
WTO	World Trade Organization

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