

Famine Early Warning Systems Network

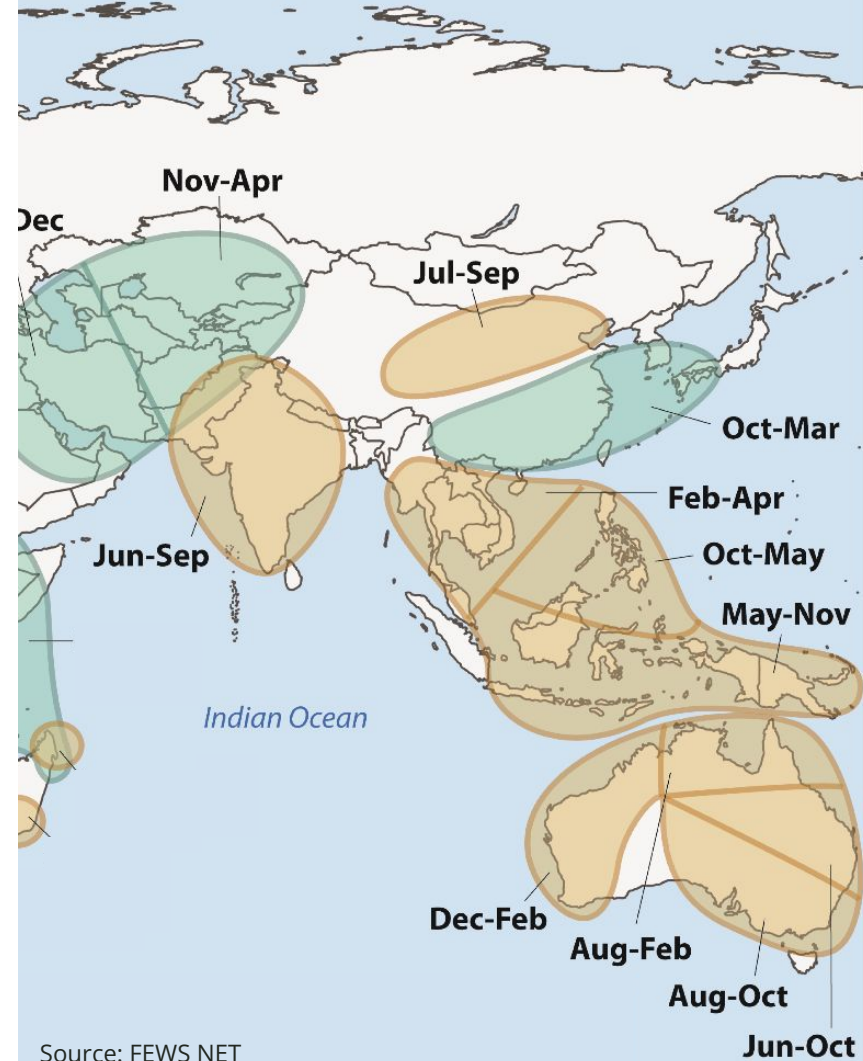
El Niño forecast, risks, and projected impacts in East Asia and the Pacific

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September 18, 2026

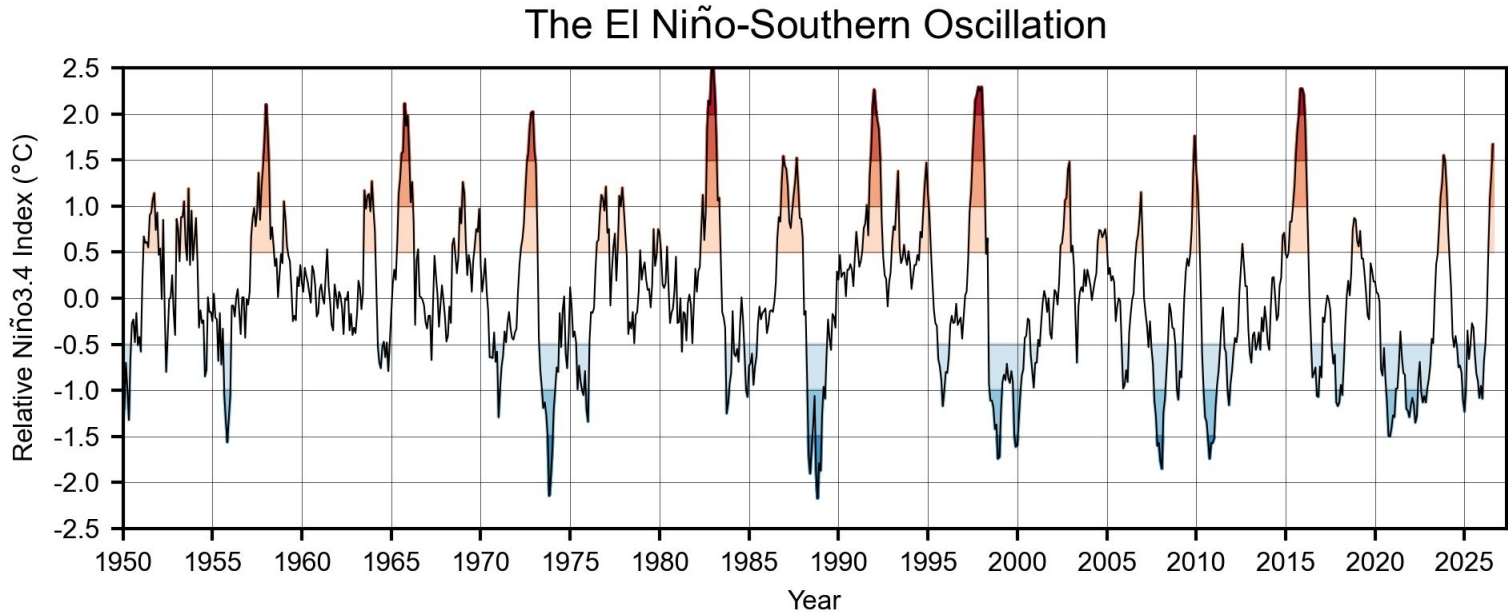
Predictability related to El Niño

El Niño enables the **prediction of conditions** in several global regions and seasons because of its effects, and because it typically remains in this phase for **approximately nine months**.



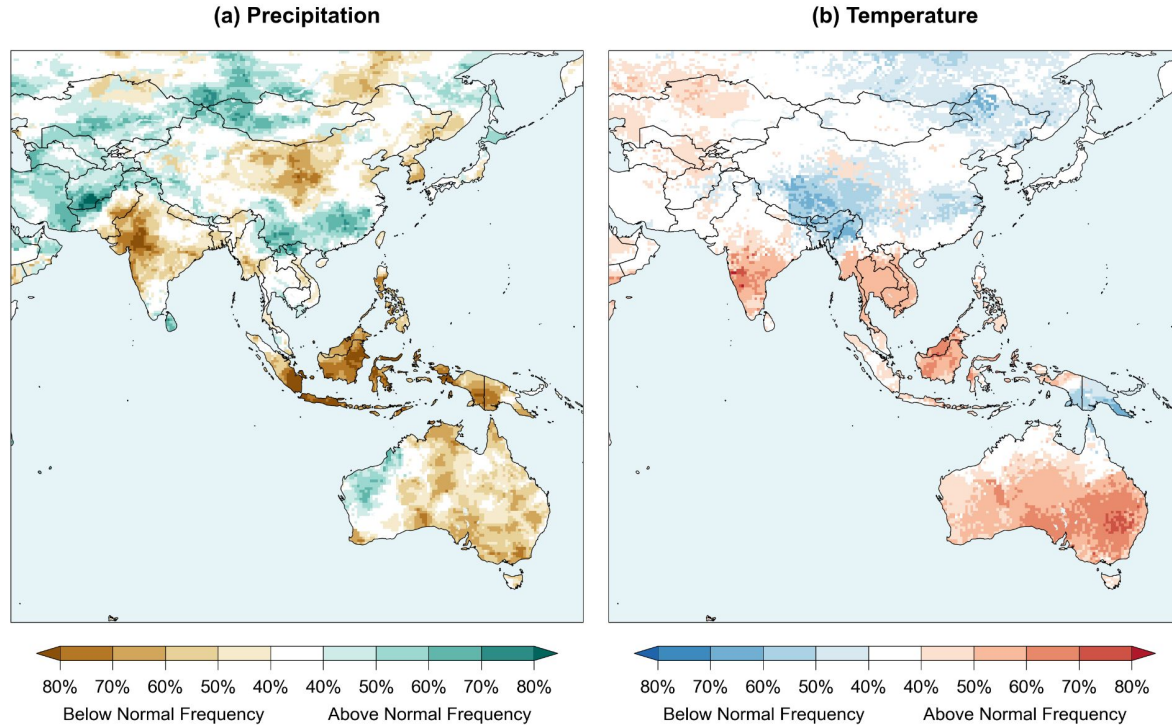
The ongoing El Niño event continues to rapidly strengthen

Very Strong El Niño events like this event are uncommon.



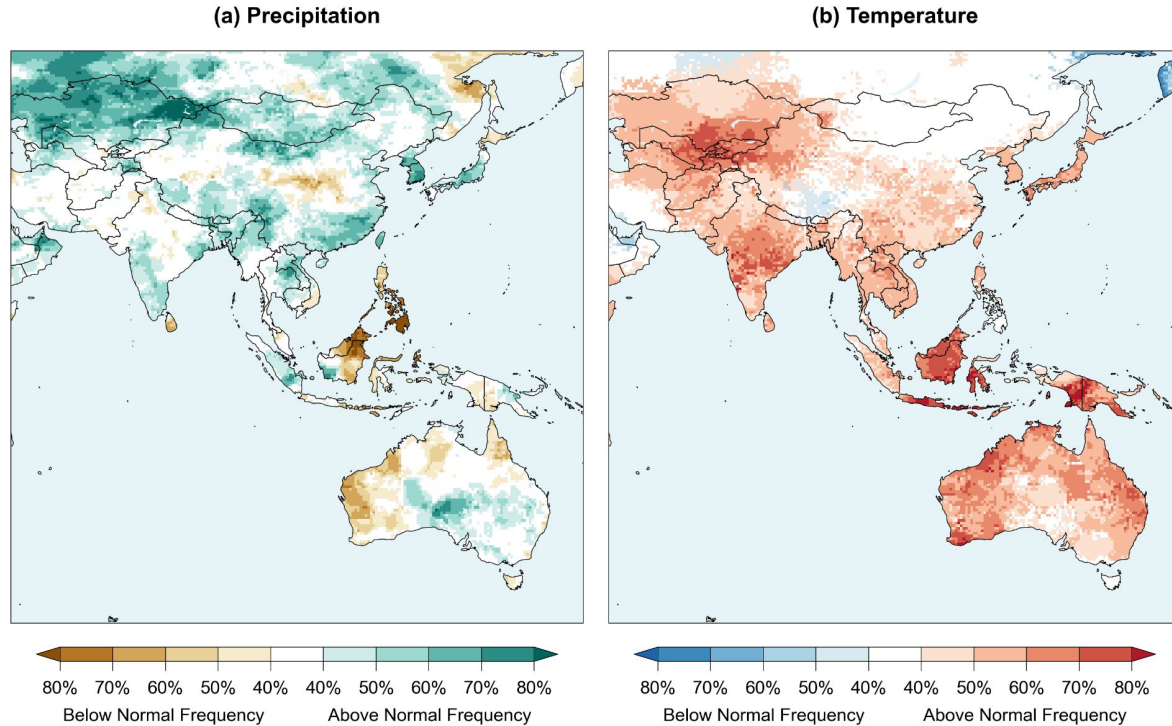
El Niño effects in East Asia and the Pacific

September-November precipitation and temperature related to Strong and Very Strong El Niño events, 1950-2025



El Niño effects in East Asia and the Pacific

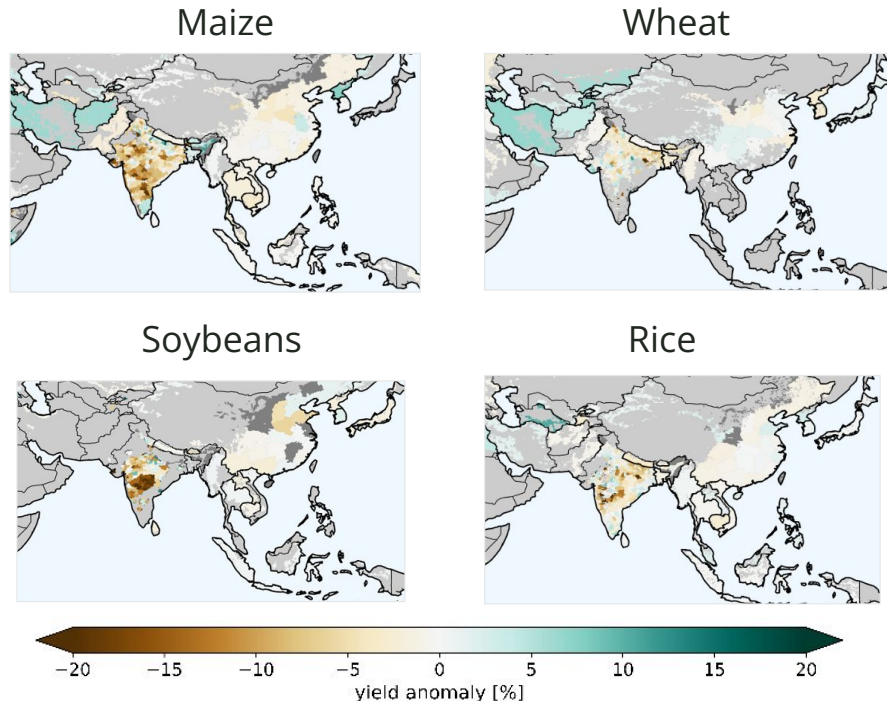
December-February precipitation and temperature related to Strong and Very Strong El Niño events, 1950-2025



Crop production and fisheries impacts

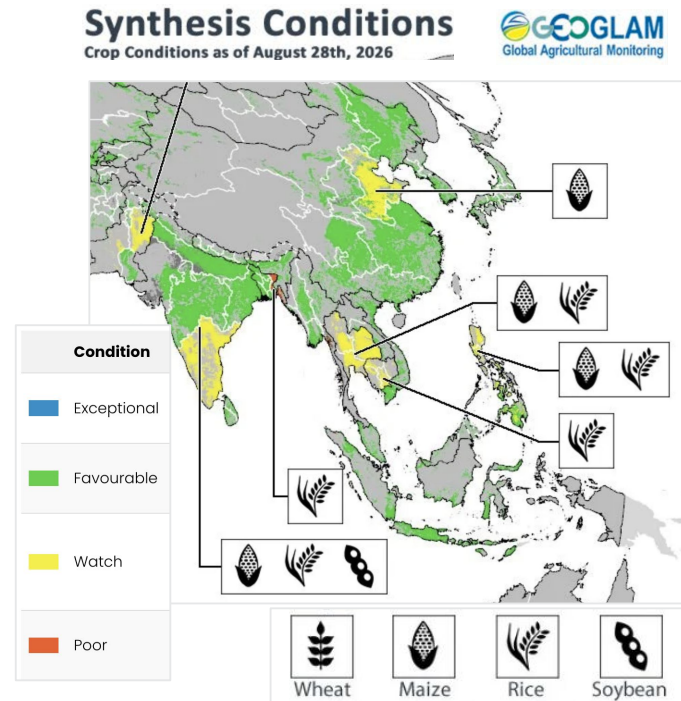
Crop yield impacts of El Niño in East Asia and the Pacific

During El Niño events, 1980-2020



Source: GEOGLAM Crop Monitor Special Report on El Niño 2026-2027: Anticipated Climate and Agricultural Yield Impacts, June 16, 2026

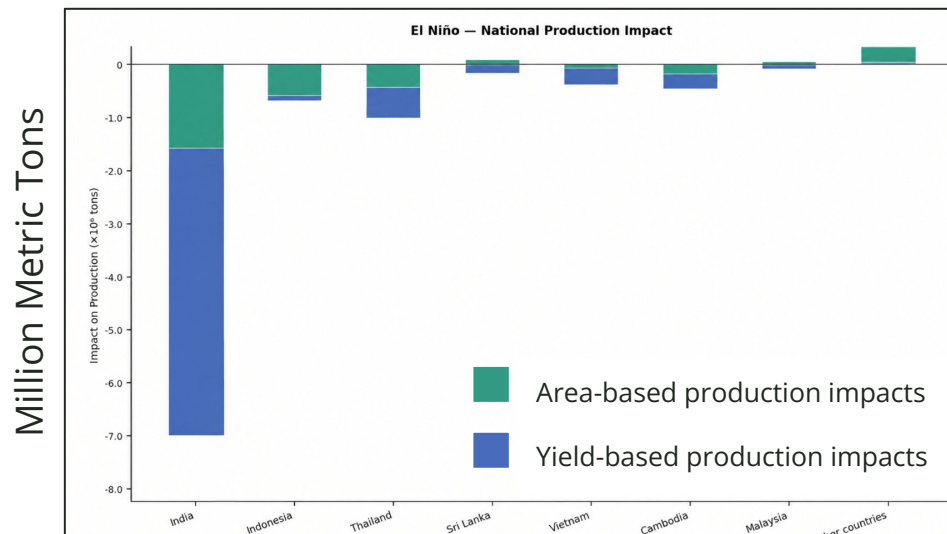
Current crop conditions



Source: GEOGLAM Crop Monitor. August 28, 2026

Rice production impacts of El Niño in East Asia and the Pacific

During El Niño events, 1960-2020



Source: IFPRI, UMD, and NASA Harvest via Xuan et al. (2026; submitted)

Current rice conditions

WASDE, September 2026 (Million Metric Tons)

Country	2026/27 Projected	2025/26 Estimated	Difference
India	147	154.02	-7.02 MMT (-4.6%)

Source: USDA WASDE report, September 11, 2026

Likely El Niño agricultural production impacts (anticipated negative)

- **India** is the dominant rice producer globally and regionally
 - Production estimated to fall 4.6 percent from last year
- **Solomon Islands** - potential minimal changes in key staple production
- **Burma** - slight rice production drop from reduced area planted, not El Niño

Country	El Niño rainfall impacts	2026/27 agricultural production	Likely agricultural production
Burma	Below-average off-season rainfall from Feb to Apr 2027	▼	Rice - limited impacts on production from El Niño. USDA estimates production decrease (8% YoY) driven by changes to area planted.
Solomon Islands	Rainfall deficits through late 2026/early 2027 based on analog El Niño episodes	▼ *	Elevated production risks for root crops, vegetables, and cash crops, including copra, palm oil, and cocoa. *Limited Data Availability

Likely El Niño agricultural production impacts (anticipated stable on balance)

Country	El Niño rainfall impacts and mitigating factors	2026/27 agricultural production	Likely agricultural production
Cambodia	- Some erratic rainfall but not a major factor - High-yield dry season rice planting has expanded	▶	Rice - USDA estimates stable production compared to last year
China	- Localized flooding and drought likely - Extensive irrigation and broad geographic production area	▶	Rice & maize - USDA estimates stable production compared to last year
Laos	- Rainfall deficits and hotter conditions during rainfed rice planting May-July - Drought and/or flooding possible in late 2026	▶	Rice - USDA estimates stable production compared to last year
Philippines	- Generally below-average rainfall with elevated temperatures - Above-average <i>habagat</i> rainfall for western areas	▶	Rice & maize - USDA estimates stable production compared to last year and 5-year average
Thailand	Below-average national rainfall and drier than normal conditions mid through late 2026	▶	Rice - USDA forecasts stable production <i>Note: was in Watch status - but currently forecast to be 1% percent above 5-year average</i>
Vietnam	- Below-average rainfall, drought, and decreased water for irrigation - Strong water management	▶	Rice - USDA estimates stable production compared to last year

Impacts of El Niño on fisheries: Overview for East Asia & the Pacific

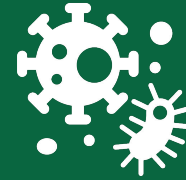
Generally, El Niño can impact aquatic foods (fisheries and aquaculture) by:



Reducing wild fish catch and moving fish stocks into new territories



Affecting fisheries and aquaculture infrastructure



Increasing risk of disease and thermal stress

Impacts of El Niño on fisheries: Overview for East Asia & the Pacific



In the EAP region, aquatic foods are very important to food and livelihood security.

- Contribution to consumption of animal protein is > than global mean (mean = 15%)
- Total economic value of production is about \$275 billion USD (China accounting for \$225 billion).
- Employs more than 22 million people (in 2024).

Impacts of El Niño on fisheries: Overview for East Asia & the Pacific



Reduced income in Western Pacific Islands: Movement of valuable tuna from West to Central Pacific moves global fleets (e.g., China, Taiwan) eastward



Local food security impacts in Pacific Islands: Heavy bleaching of coral reefs reduce fisheries



Infrastructure damage: Higher risk of tropical cyclones in some Pacific Islands



Coastal pollution from algal blooms: Reducing coastal marine fisheries



Reduced inland fisheries: Compounded effects from drought on rice and inland fisheries



Reductions in aquaculture: Higher feed prices, poor water quality

Impacts of El Niño on fisheries: Solomon Islands

Primary risks of El Niño to fisheries in Solomon Islands

- Reduced coral reef fisheries may cause lower domestic food availability
- Disruption to key commercial tuna fisheries may reduce national and household income (tuna = 18% of GDP)

Consumption of aquatic animals is very high: 59% of animal protein consumed, annually (global mean = 15%)

Key fisheries (production per year)

- Freshwater wild catch: 0 MT in 2024
- Freshwater aquaculture/farmed: negligible
- Marine catch: 70,000 MT (primarily tuna, marlin, sharks) in 2024
- Marine aquaculture/farmed: 31,000 MT (seaweed) in 2024

Past observations of El Niño impacts (very few studies and little data)

- Stronger, more frequent Tropical Cyclones
- Changes in fish availability
- Widespread coral death

Impacts of El Niño on fisheries: Philippines

Primary risks of El Niño to fisheries in Philippines

- Likely reduction in tilapia, shrimp, crab, seaweed, milkfish, catfish, and sea bass production due to harmful algal blooms and decreased water quality
- Disruptions in domestic production may lead to food insecurity and decreased income for fisherfolk

Consumption of aquatic animals is high: 32-42% of animal protein consumed, annually (global mean = 15%)

Key fisheries – Total fisheries production: 3,848,000 MT in 2024

- Top commodities: seaweed, tuna, milkfish, tilapia, shrimp, varied small schooling fish (e.g., sardines, anchovies)
- Top five producing regions (by volume): Barmm, Mimaropa, Region IX, Region III, Region VI
- Employs > 2,700,0 municipal fisherfolk (29% female)
- Freshwater wild catch: 165,000 MT in 2024
- Freshwater aquaculture/farmed: 564,000 MT in 2024
- Marine catch: 1,462,000 MT in 2024
- Marine aquaculture/farmed: 1,657,000 MT in 2024

Past observations of El Niño impacts

- Reported damages and losses in 2023 amounted to PhP 61.64 million, affecting 3,086 fisherfolk in CAR, Region 1, Region 2, Region 5, and Region 6.

Impacts of El Niño on fisheries: Mekong Basin

Primary risks of El Niño to fisheries in Mekong Basin

- Drought affects freshwater fisheries and terrestrial staples (i.e., rice) simultaneously
- Global prices of aquaculture feed also likely to rise

Protein consumption from aquatic animals is high: EAP mean = 39% of annual animal protein cons. (global = 15%)

- Range: KHM: 70%, THA: 39%, LAO: 36%, MMR: 34%, VNM: 30%, CHN: 23%

Key fisheries: Seaweeds and kelps, catfishes, silver barb, cyprinids, carps, tilapias, bivalves, shrimp

	CHN	KHM	LAO	MMR	THA	VNM
Fresh, Wild	1,000,000	500,000	80,000	1,000,000	200,000	160,000
Fresh, Farmed	35,000,000	300,000	150,000	1,000,000	500,000	3,000,000
Marine, Wild	11,000,000	N/A	N/A	N/A	1,400,000	3,000,000
Marine, Farmed	47,000,000	N/A	N/A	N/A	500,000	2,500,000
TOTAL (MT, 2024)	~94,000,000	~800,000	~230,000	~2,000,000	~2,600,000	~8,700,000

Past observations of El Niño impacts

- Regional aquaculture production can fall by more than 10% during extreme El Niño events
- Water management and integrated shrimp and rice production only partially mitigate impacts

Market impacts

El Niño trade considerations in East Asia and the Pacific

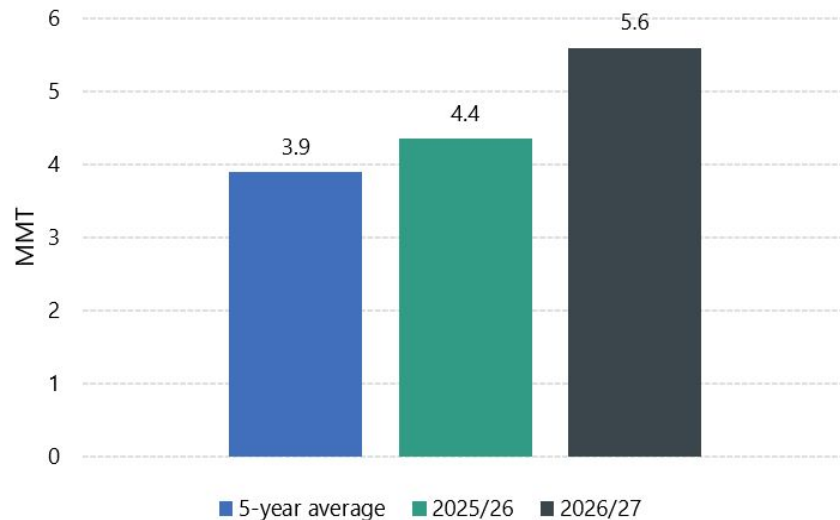
- **India** is the largest global rice exporter, supplying 40% of world exports.
 - Below-normal monsoon drives production down 4.6% YoY, but anticipated totals remain similar to 5YA.
 - Record high rice exports are anticipated due to a record 25/26 harvest and ample stocks.
- **Thailand and Vietnam** - stable production supports steady exports compared to last year (7.5 MMT and 8.1 MMT)
- **China** is a major rice importer, and is projected to increase maize production 1.9% YoY despite localized heat damage to the smaller summer crop.
- **Regional rice export prices** are forecast to be above last year (e.g., +26% for Thai 5% broken rice) with no export restrictions in place.
 - **El Niño's contribution to price increases cannot be isolated from other cost pressures.**



Other regional trade considerations

- The **Philippines** is the largest global rice importer, accounting for roughly 40-45% of regional imports.
- There is an increase in Philippine rice imports, up 29% YoY and 5YA.
 - **Not primarily driven by El Niño** - largely due to reduced carry-over stocks and rising domestic demand.
 - El Niño presents an additional potential risk.
- 5% broken rice import restriction expected to shift importers toward higher-broken grades.
 - Increased competition with China and other major broken-rice buyers as global supplies tighten ([USDA](#)) **could increase upward pressure on rice prices.**

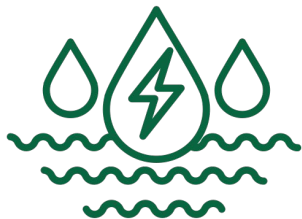
Philippine rice imports compared to prior MY and five-year average



Source: [USDA](#)

Energy considerations: Hydroelectric power

- Regional hydropower use is typically higher December-May
- Early 2027 is key to watch
- S&P Global reported hydropower usage in Asia was already down in June



Laos

- **Hydroelectric is 70-80%** of total domestic electricity
- **Key regional supplier**
 - Sells electricity to Burma, Cambodia, China, Singapore, Thailand, and Vietnam
- **Domestic power blackouts** already common (May to August)
- Electricity **exports prioritized** over domestic use
- **Likely lower reservoirs from El Niño**
 - **Could lead to reduced exports in 2027**
 - In 2023, Laos imported electricity from Thailand, costing 240 million USD

Energy considerations: Hydroelectric power

Rest of the region - more diversified energy mix

Country	Hydroelectric power as a percentage of total energy mix
Burma	38%
Vietnam	33%
Cambodia	25-25%
Philippines	11%
China*	13%
Thailand	4%
Solomon Islands	No hydroelectric

*world's largest producer of hydroelectric power



Acute food insecurity focus: The Philippines and Burma

Summary: Implications of El Niño in the Philippines



Timing of rainy season: Southwest monsoon May to October 2026



Primary El Niño weather concern: Below-average rains and dry spells, particularly in the south; continued storm and flood risks in the northern and western regions



Key interacting drivers: High fuel and fertilizer prices



Area of highest concern: Southern areas in Mindanao and parts of Visayas



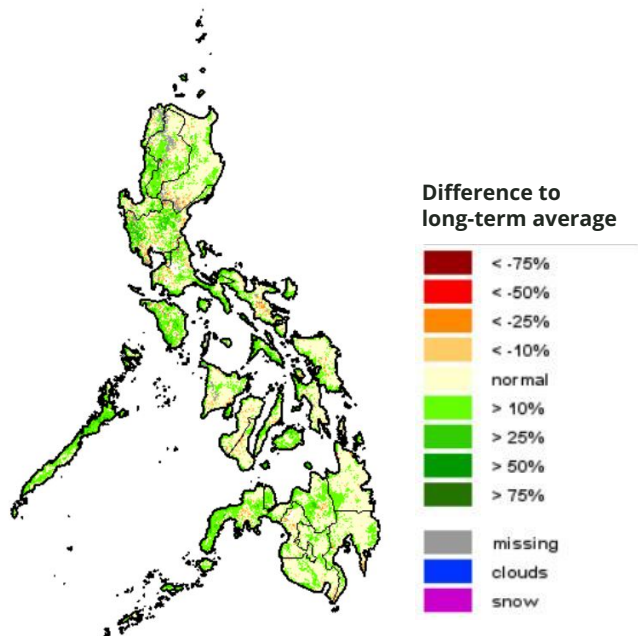
Peak population in need and timing: 1.0-2.49 million people, peaking in June to July 2027

From the perspective of global impacts on acute food insecurity, **overall level of concern** for the Philippines is **low**.

Note: FEWS NET does not have a presence in the Philippines but reports on the country under our global coverage.

The Philippines: July-September seasonal progress update

Vegetation conditions as a % of average,
August 2026



Source: FAO GIEWS



The Philippines

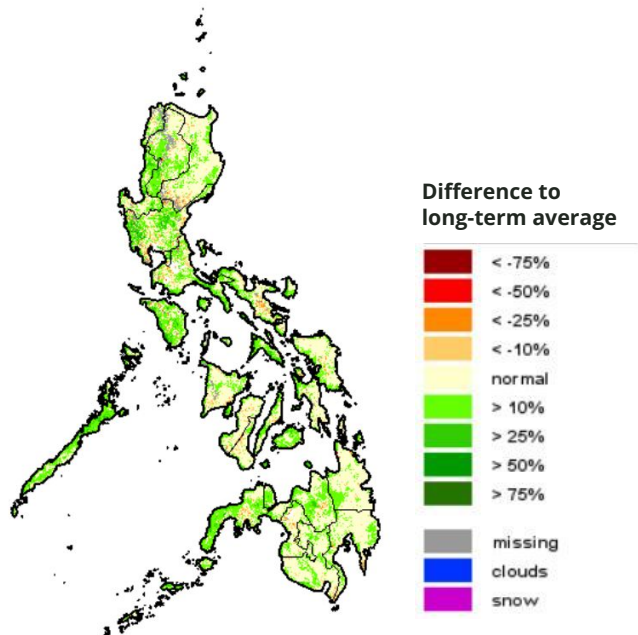
Below-average rainfall is **reducing soil moisture and water availability** (including reservoir levels critical for irrigation) in some key agricultural areas.

Combined with rising input costs and weak planting levels, there are **localized declines in main-season rice and maize cultivation extent and yields**.

At the same time, **ongoing storm and flood risks** persist during the monsoon season, as evidenced by recent flooding in northern and western areas.

The Philippines: July-September seasonal progress update

**Vegetation conditions as a % of average,
August 2026**



Source: FAO GIEWS

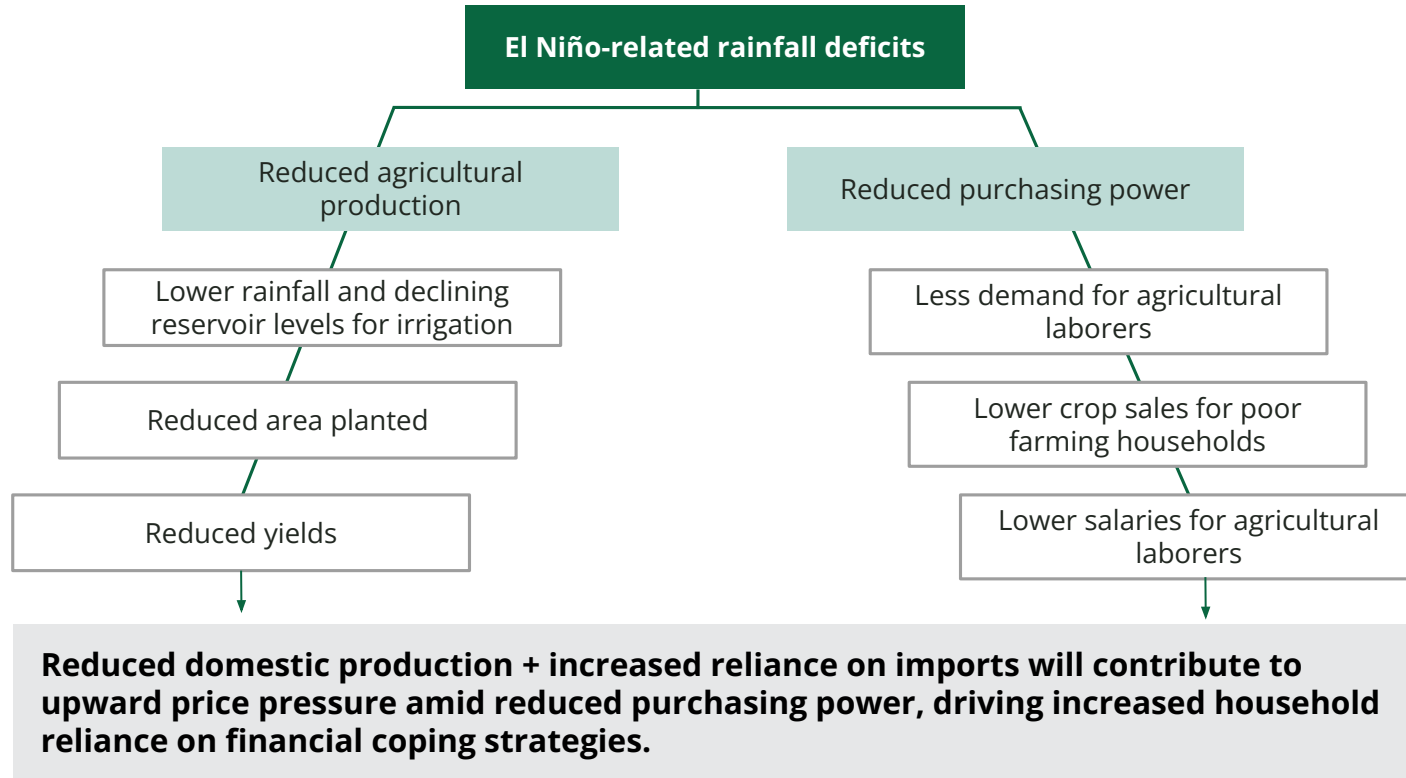


USDA estimates only a slight decline in total annual rice production for the July 2026 - June 2027 marketing year, with output remaining broadly in line with last year and the 5-year average.

Strong second-season rice production in early 2026 is likely to partially offset market impacts from main-season rice harvest losses, but losses in next year's second-season rice harvest are a concern.

If early 2027 losses materialize, the effects would likely be comparable to the 5% reduction in rice during the 2015/16 El Niño.

The Philippines: Transmission pathways and food insecurity implications



Summary: Implications of El Niño in Burma



Timing of rainy season: May to October 2026



Primary El Niño weather concern: Below-average rainfall from February to April 2027; however, cumulative rainfall during this period is typically low and is not key for agricultural production



Key drivers: Conflict, high fuel and food prices, and flooding due to above-average rainfall (not related to El Niño)



Area of highest concern: Rakhine and other conflict-affected areas in Sagaing, Magway, Kachin, Chin, and Kayah

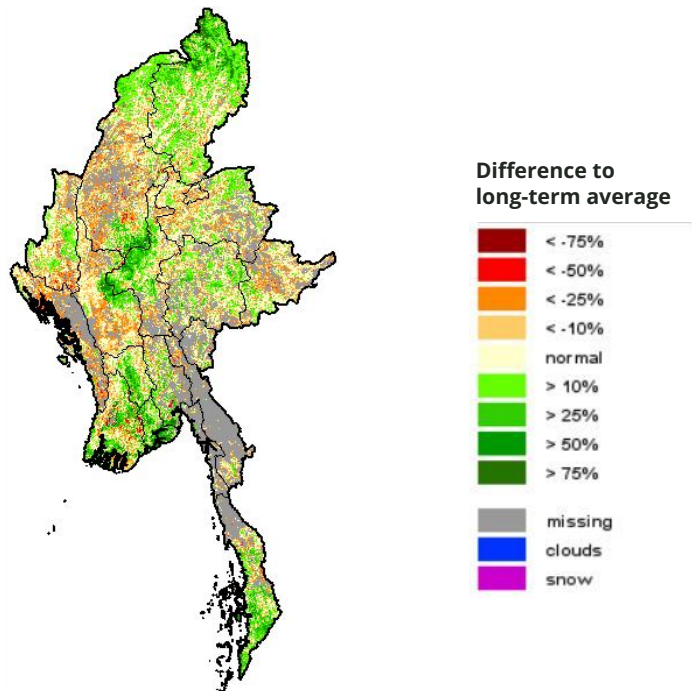


Peak population in need and timing: 5.0-5.99 million people, peaking in May to July 2027

From the perspective of global impacts on acute food insecurity, **overall level of concern** for the effects of El Niño on Burma is **low**.

Burma: May-October seasonal progress update

Vegetation conditions as a % of average,
August 2026



Source: FAO GIEWS

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Burma

Above-average May to October monsoon rainfall has supported **generally favorable crop conditions**, despite localized flooding.

Flood-related impacts on aggregate rice production are currently expected to be **limited** despite localized paddy losses.

El Niño is not expected to notably impact staple crop production. El Niño may affect off-season rainfall, but the impacts would be limited given greater reliance on irrigation during the off-season.



Burma: Projected acute food insecurity outcomes

**October 2026 - January 2027,
coinciding with the main harvest**

Crisis (IPC Phase 3) outcomes are likely in areas where a high concentration of **conflict** is constraining access to livelihoods and markets, as well as in some **flood**-affected areas where displacement and crop losses have further reduced household access to food and income.

Stressed (IPC Phase 2) outcomes are likely in areas where conflict continues to limit livelihood opportunities yet households are still able to access adequate food.

