

# FOODCROPS AND SHORTAGES

No.3

August 2003

	<p><b>AFRICA:</b> In eastern Africa, recent food aid pledges for Eritrea and Ethiopia have boosted the food aid pipeline but accelerated deliveries and pre-positioning of food are urgently needed. In Tanzania, despite the overall stable food situation, there are serious food security concerns for the central, southern and northern coastal areas. In west Africa, the food situation remains alarming in Liberia, while emergency food assistance is still needed in Côte d'Ivoire and Mauritania. In DR Congo, a serious humanitarian situation persists in Ituri despite international intervention and formation of a transitional national government.</p>
	<p><b>ASIA:</b> A large number of countries have been affected by tropical storms, typhoons, floods, and drought in Asia including China, India, Pakistan, Philippines, Bangladesh, Nepal, East Timor, and Mongolia. Hundreds of people have been killed and hundreds of thousands have had to be evacuated. Crops have been affected significantly. In Asian CIS, unfavourable weather conditions have affected cereal production. Georgia and Armenia will require some targeted food aid. A record cereal crop is envisaged in Afghanistan, but access to food remains a problem for a large number of vulnerable people.</p>
	<p><b>LATIN AMERICA AND THE CARIBBEAN:</b> In Central America, food assistance is still required in El Salvador, Guatemala, Honduras and Nicaragua for families affected by natural disasters of the past 5 years and recurrent economic shocks. The assistance should target affected women and children. In South America, the outlook is poor in Ecuador for the 2003 maize crop as a result of adverse weather. In Venezuela, prospects are poor for the coarse grain and paddy crops, mainly as a consequence of the reduced use of farm inputs due to the low purchasing power of farmers. In Haiti, food assistance will also be distributed to drought-affected farmers.</p>
	<p><b>EUROPE:</b> Prospects for the 2003 cereal crops have deteriorated across Europe in the wake of several weeks of exceptionally hot and dry weather. Wheat output in the EU is forecast to fall 10 percent and that of coarse grains is also forecast down to about 10 percent. Among the CEECs even larger reductions are expected. Adverse weather conditions have also compromised cereal harvest in the European CIS. Ukraine will be a net cereal importer while Russia will remain a net exporter but not a significant player in the international grain market.</p>
	<p><b>NORTH AMERICA:</b> Cereal production in North America is set to recover sharply in 2003 from last year's drought-reduced levels. A good winter wheat crop has been harvested in the United States, about 50 percent up from 2002. Prospects for the spring wheat and coarse grains are also favourable. Likewise, in Canada, the main cereal crops of wheat and barley are faring much better than last year and production should rebound.</p>
	<p><b>OCEANIA:</b> Reflecting a generally satisfactory winter sowing season, prospects for the 2003 winter cereal output are favourable. Outputs of wheat and barley are expected to rebound to more than double the drought-reduced levels in the previous year. However, the 2003 summer coarse grains and rice crops, which have already been harvested, were sharply reduced due to reduced irrigation supplies on account of last year's drought.</p>



## AFFECTED COUNTRIES <sup>1/</sup>

### COUNTRIES REQUIRING EXCEPTIONAL EXTERNAL ASSISTANCE (Total: 38 countries)

<u>Region/Country</u>	<u>Reason for Emergency</u>	<u>Region/Country</u>	<u>Reason for Emergency</u>
<b>AFRICA (23 countries)</b>		<b>ASIA (8 countries)</b>	
Angola	Returnees	Armenia*	Effects of recent droughts and economic structural problems.
Burundi*	Civil strife, IDPs	Afghanistan*	Effects of recent drought and war
Cape Verde	Drought	Georgia*	Structural problems and input shortages
Central Afr. Rep.	Civil strife, IDPs	Iraq*	Recent war, shortage of inputs, effects of recent drought
Congo, Dem.Rep.*	Civil strife, IDPs and refugees	Korea, DPR*	Economic constraints
Congo Rep. of	Civil strife, IDPs	Mongolia*	Harsh winters, flooding
Côte d'Ivoire	Civil strife, IDPs	Tajikistan*	Effects of recent drought
Eritrea	Drought, IDPs, returnees	Timor-Leste	Drought, flooding
Ethiopia	Drought, IDPs	<b>LATIN AMERICA (5 countries)</b>	
Guinea*	IDPs and refugees	El Salvador	Effects of adverse weather and economic shocks
Kenya	Drought in parts	Guatemala	Effects of adverse weather and economic shocks
Lesotho	Adverse weather in parts	Haiti	Drought
Liberia*	Civil strife, IDPs	Honduras	Effects of adverse weather and economic shocks
Madagascar	Drought in southern parts	Nicaragua	Effects of adverse weather and economic shocks
Mauritania	Drought	<b>EUROPE (2 countries)</b>	
Mozambique	Drought in southern parts	Russian Federation (Chechnya)	Civil strife
Sierra Leone*	Civil strife, IDPs	Serbia & Montenegro	Refugees
Somalia	Civil strife, drought in parts		
Sudan	Civil strife, drought in parts		
Swaziland	Drought in parts		
Tanzania	Drought in parts, refugees		
Uganda	Civil strife, IDPs, drought in parts		
Zimbabwe*	Drought, economic disruption		

### COUNTRIES WITH UNFAVOURABLE PROSPECTS FOR CURRENT CROPS

<u>Country</u>	<u>Main contributory factor</u>	<u>Country</u>	<u>Main contributory factor</u>
Armenia	Frost, drought	Moldova	Drought and frost
Bulgaria	Drought and heat wave	Mongolia*	Floods
China (8 southern Provinces)	Drought and floods	Philippines	Typhoon Imbudo
Cape Verde	Delayed rains	Romania	Drought and heat wave
Central Afr. Rep.	Civil strife	Senegal	Dry weather in the north
Côte d'Ivoire	Civil strife, dry weather	Sierra Leone*	Dry weather
Czech Republic	Drought and heat wave	Slovak Republic	Drought and heat wave
Ecuador	Adverse weather	Tanzania	Dry weather
Ghana	Dry weather	The FYR of Macedonia	Adverse weather
Guinea*	Dry weather	Ukraine	Frost and drought
Guinea Bissau	Grasshopper attacks	Venezuela	Lack of inputs and inadequate water availability
Hungary	Drought and heat wave		
Liberia*	Civil strife, dry weather		
Mauritania	Dry weather		

### PURCHASE AND DISTRIBUTION OF LOCALIZED OR EXPORTABLE SURPLUSES REQUIRING EXTERNAL ASSISTANCE:

Afghanistan, Russian Federation (Chechnya)

<sup>1/</sup> Both here and in the text, countries with unfavourable prospects for current crop and/or uncovered shortfalls are marked in **bold** and those affected or threatened by successive poor crops or food shortages are marked with an asterisk (\*). Definitions can be found on the Contents page. This updates information on food emergencies in the June issue of "Food Outlook".

Note: The maps on the front cover indicate countries with unfavourable crop prospects and/or those facing food emergencies.

## CROP AND FOOD SUPPLY SITUATION

### OVERVIEW

As of August 2003, the number of countries facing serious food shortages throughout the world stands at 38, with 23 in Africa, 8 in Asia, 5 in Latin America and 2 in Europe. In many of these countries the food shortages are compounded by the impact of the HIV/AIDS pandemic on food production, marketing, transport and utilization. The recently published joint FAO/WFP Crop and Food Supply Assessments highlight this factor (<http://www.fao.org/WAICENT/faoinfo/economic/giews/english/fs/fstoc.htm>).

In **eastern Africa**, harvesting of the 2003 main season crops is underway in southern parts of the sub-region while in northern parts crops are at varying stages of development. In Kenya and Tanzania cereal outputs are expected to be lower than last year reflecting late onset and/or erratic rainfall. In Uganda the outlook is mixed while in Somalia, although lower than last year, an above average crop is anticipated. In Eritrea, Ethiopia and Sudan, improved rainfall conditions were reported but it is too early to have a clearer picture. Serious and widespread food shortages persist in Eritrea due to last year's drought, poverty and the lingering effects of the war with Ethiopia. About 2.3 million people are now reported to be facing severe food shortages. Of these, about 1.4 million were reported to be drought affected. Similarly in Ethiopia severe food shortages continue to be reported in various parts of the country, but is most severe in southern Ethiopia, due to a poor crop last year and extensive chronic poverty. A recent multi-agency assessment indicated that the number of people in need of food assistance is now about 13.2 million compared to the earlier figure of 12.5 million. In Tanzania, prolonged drought conditions in several parts of the country have affected large number of households with an estimated 1.9 million people in need of food assistance. In Uganda, the humanitarian situation in northern and eastern parts continued to worsen due to escalation of conflict. Recent fighting between Government forces and rebels has displaced more than 820 000 people bringing the total number in need of emergency assistance to more than 1.6 million people.

In **southern Africa**, the 2003 cereal output is estimated at 21.5 million tonnes, slightly higher than the previous year. This reflects a decline in the largest producer South Africa, more than compensated by a recovery in other countries of the sub-region which were affected by poor crops in the previous two years. While there is a general improvement in the food security situation, substantial amounts of food aid are still required, mainly in Zimbabwe where the number of needy population is estimated at 5.5 million, but also in southern provinces of Mozambique, for returnees populations in Angola and in areas affected by localized crop losses and household vulnerability caused by the HIV/AIDS pandemic.

In **the Great Lakes region**, in the Democratic Republic of Congo (DRC), harvesting of the 2003 second season food crops is underway in eastern and north-eastern parts. However, favourable growing conditions notwithstanding, production is expected to be sharply reduced following the escalation of the civil war in these areas, mainly in Ituri District. The UN Security Council authorised in late May the deployment of a 1 500 strong multinational emergency force to Bunia, the main town in Ituri. In mid-June, FAO and WFP jointly approved an Emergency Operation to assist 483 000 worst affected in the northern and eastern parts of the country, including the internally displaced, returnees from neighbouring countries and vulnerable groups. The operation is for a period of six months starting mid-June 2003, and is to provide 32 236 tonnes of cereals and 9 934 tonnes of beans. In Burundi, harvesting of the 2003 second season foodcrops, mainly sorghum and beans, is well advanced. A good bean crop is anticipated in the main growing regions of Kirundo, Muyinga and Ruyigi, where prices of beans have declined by about half with the arrival of the new harvest into the markets. However, in other regions, the late planted bean and sorghum crops were damaged by excessive rains and hail in May and by insufficient rains earlier in the season. Provinces worst affected by localized crop losses are Kirundo, Muyinga, Karuzi, Cankuzo, Makamba, Mwaro, Kayanza and Muramvya. Food aid is being provided to populations affected by the escalation of the civil conflict in April and May. In Rwanda, harvesting of the 2003 second season food crops, mainly sorghum and beans, is underway. A satisfactory harvest is anticipated following abundant rains in late April and May, which improved conditions for crops previously affected by erratic precipitation. Production of Irish potatoes and bananas is also expected to be normal. However, reduced crops have been harvested in the Bugesera Region, where rains were insufficient and the food situation is likely to deteriorate in the coming months. Localized crop losses are also reported in parts of Rukara District in Umutara province.

In **central Africa**, the food security is still precarious in Central African Republic, and food production is not expected to increase this year due to reduced planting and seed shortages, following population displacement.

In **northern Africa**, harvesting of the 2003 winter cereal crops has been virtually completed. Normal to abundant rains over the main producing areas at planting and well distributed throughout the development period have significantly benefited the crops. Aggregate cereal output in 2003 is provisionally estimated at a record of about 35 million tonnes, an important increase from 2002 when an average 28 million tonnes were collected. Production of

wheat, the main cereal, is estimated at 16.7 million tonnes, which compares to an average 12.1 million tonnes harvested in 2002. The increase in wheat production was particularly noticed in Algeria, where an increase of 100 per cent with respect to 2002 is observed, in Morocco, where the increase reached 60 per cent, and in Tunisia where production almost tripled from the 2002 level. A slightly above-average wheat output was harvested in Egypt.

In **west Africa**, with erratic and generally below average rainfall so far in most coastal countries along the Gulf of Guinea, the outlook for the 2003 crops is generally unfavourable. Prospects for the main season crops have been damaged by extended dry weather over most of Ghana, Côte d'Ivoire, Liberia, Sierra Leone and Guinea. In the Sahel, early crop prospects are generally uncertain in Senegal reflecting limited rains in parts and Guinea-Bissau due to large scale grasshopper attacks. By contrast, in the eastern and the central parts of the Sahel, weather conditions have been favourable so far with widespread and quite regular rains over most of Chad, Burkina Faso, Niger and Mali. In Mauritania, where the onset of rains has provided some relief to pastoralists, emergency food aid distributions and subsidized sales of wheat have improved the food situation in the worst-hit regions. In Côte d'Ivoire, the food situation remains critical, particularly in the west and the rebel-controlled north. In Liberia, an alarming humanitarian situation has emerged after fighting in Monrovia, where hundreds of thousands of people have sought refuge in almost 100 temporary shelters in the city including churches, schools, stadiums, etc, without running water or food. In this country, intensified fighting has disrupted the current agricultural season and displaced thousands of families, pointing to a further drop in rice production this year, and hence increased food aid needs.

In **Asia**, several countries have been affected by tropical storms, typhoons, floods and drought. Hundreds of people were killed and hundreds of thousands have been displaced. Standing crops were also affected significantly. In China, central, eastern, and southern regions suffered from the worst floods since 1991, affecting tens of millions of residents and inundating several million hectares of farmland. More than 3.5 million people have been reported homeless. On the other hand, eight provinces in southern China are also suffering from drought, affecting millions of people and damaging large area of crops. In Indonesia, rice fields have suffered from severe drought this year and more than 10 000 hectares were affected. In the Philippines, typhoon Imbudo hit vast agricultural lands in northern Luzon and the estimated damage to maize is put at 446 000 tonnes. In India, monsoon, though late, brought heavy rainfall to the north-eastern states, mainly Assam and Bihar, affecting some 2.5 million people. In Bangladesh, some 45 000 people have been displaced and many summer rice seedbeds have been destroyed. Mongolia suffered from worst flooding since 1982 this year killing people and devastating crops and property.

In the **Near East**, the outlook for the 2003 crop production is generally favourable. In Iraq, the harvesting season is complete. An FAO/WFP Crop, Food Supply and Nutrition Assessment Mission has completed its field work and the report is under preparation.

In the **Asian CIS**, aggregate cereal harvest this year is 13 percent down on last year's harvest. Unusually cold winter and dry spring compromised cereal crops in Kazakhstan, Georgia and Armenia, while the weather proved favourable for crops in the rest of the region. Coarse grains have fared better than the wheat crop. Many of the governments in the region have made concerted efforts to increase food production at the expense of cotton, the main industrial crop in Central Asia.

In **Afghanistan** the prospects are for a record cereal harvest this year, owing to improved precipitation and larger than average areas under cereal cultivation. However, access to food will remain an issue for a large number of vulnerable households.

In **Central America and the Caribbean** harvesting of the 2003/04 first season cereal and bean crops is about to start. The outlook is good in Central American countries, as the total area planted to maize (the main cereal) is estimated as average; however, production will largely depend upon the intensity of the rains in the weeks ahead, which are forecast to be typical of the ongoing hurricane season. Average to above-average maize outputs are tentatively forecast for El Salvador, Guatemala, Honduras and Nicaragua. Despite the favourable forecast, food assistance from the international community will continue to be provided until February 2006 in these particular countries (World Food Programme's Protracted Relief and Recovery Operation 10212.0) to families affected by the natural disasters of the past 5 years and recurrent economic shocks. The assistance will be focused on affected women and children and should also contribute improve household food supply. In Mexico, planting of the important spring/summer maize crop continues for harvesting from October. A slightly above-average output is early forecast. In the Caribbean, harvesting of the 2003/04 first season rainfed coarse grain crops is underway in Haiti, Dominican Republic and Cuba. Average to above-average outputs, particularly in the second country, are expected provided normal weather conditions prevail. In Haiti, food assistance will be distributed to farmers affected by recurrent droughts, particularly in the north-western areas.

In **South America**, planting of the 2003 wheat crop is still underway in some countries, while harvesting of the 2003 maize crops has been completed in the southern areas. In Argentina, soil moisture deficits in the main producing areas have delayed planting of the 2003 wheat crop. Sowing should be completed in the days ahead and production is early forecast at 14.5 million tonnes, which compares to the low 12.3 million tonnes collected in 2002. The anticipated increase is due to a more intensive use of fertilizer. Maize output collected in 2003 has increased from the 14.7 million tonnes harvested the year before, and an average of some 15 million tonnes to 15.5 million tonnes of maize are provisionally estimated. In Brazil, wheat plantings have been only completed and production is forecast at a high 4.74 million tonnes, while maize output collected has been a record 45.8 million tonnes. The increase is largely the result of the government's production incentive programme to help reduce the country reliance on imports. In Chile, planting of the wheat crop has been also recently completed and a slightly above-average area planted is reported. In Uruguay, sowing of the 2003 wheat crop still continues. Intended wheat plantings should be below average. In Paraguay, planting of the 2003 wheat crop, which had been disrupted because of severe dry weather, has been recently completed and an average output is early forecast. In the Andean countries, in Bolivia, harvesting of the 2002/03 second season cereal crops has been completed and average outputs collected, while in Ecuador, the outlook is poor for the 2003 maize crop for the third consecutive year, mainly the result of adverse weather which particularly affected the first season crop. In Peru, prospects are good for the 2003 maize crops and an above-average output is expected. In Colombia, planting of the 2003/04 first season cereal crops continues under favourable weather and enlarged maize plantings, with respect to 2002 average level, are anticipated. In Venezuela, prospects are poor for the 2003 cereal crops, mainly as a consequence of the inadequate use of fertilizers and the lack of good quality seeds. This is principally due to the low purchasing power of farmers caused by the difficult economic situation presently faced by the country.

In **Europe**, Prospects for the 2003 cereal harvest have deteriorated in Europe in the wake of exceptionally hot and dry conditions throughout many of the main producing areas, particularly in the central and southern countries. Wheat output in the EU is forecast at about 94 million tonnes, 10 percent down from last year and 7 percent below the average of the past 5 years, while for coarse grains, contrary to earlier expectations, output is now also expected to decline, by about 10 percent, to around 97 million tonnes. Among the CEECs even larger reductions are expected as the adverse spring/summer weather follows on from a less than ideal planting and winter period in many parts also. Well below normal wheat and small coarse grain crops expected in virtually all countries. There are still some hopes that the maize crop may remain closer to normal if significant rains arrive for the remainder of the growing season.

In the European **CIS**, adverse weather conditions, thin snow cover and severely cold winter followed by unusually hot and dry spring, have significantly compromised cereal harvest this year. Aggregate cereal harvest in the region is seen almost 33 million tonnes down on 2002 harvest. Wheat harvest now estimated at 43.1 million tonnes, accounts for almost all of the decline. Aggregate coarse grains harvest now estimated at 52.3 million tonnes is slightly above last year's harvest, in view of the resistance of the crop to adverse weather conditions and replanting in spring. Wheat harvest in Ukraine is now estimated at 5.5 million tonnes compared with 19.7 million tonnes last year and in Russia 36.5 million tonnes compared with 50.6 million tonnes last year. Moldova has suffered severely and wheat harvest, the main staple, is now estimated at 221 000 tonnes compared with 1.2 million tonnes last year. The drop in cereal harvest will severely affect exports from the region, which was at a record high during the marketing year coming to an end. In the Baltics, the cereal harvest this year is seen to remain similar to last year's average harvest. The livestock sub-sector has been gaining more importance in the agricultural sector of the three Baltic countries. Unusually cold winter and relatively dry spring have compromised large areas of cereals in Bosnia and Herzegovina, Serbia and Montenegro and Croatia. Cereal harvest in the three countries is seen significantly lower than last year's improved harvest.

In **North America**, Cereal output in North America is set to recover sharply in 2003 from last year's drought-reduced crops. Latest indications for wheat output in the United States, now that the winter wheat harvest is almost complete, point to a larger crop than earlier expected, of almost 62 million tonnes, 42 percent up from the previous year's reduced level. In Canada, despite some seeding delays and persisting dry conditions in parts, wheat production this year is still expected to increase significantly from last year's poor crop and is forecast to reach about 22 million tonnes. Likewise, the coarse grain crops in both countries are also expected recover from poor performance last year. The United States maize crop is forecast to reach 256 million tonnes, 12 percent up from 2002.

In **Oceania**, The winter cereal sowing conditions were generally improved over the previous year with satisfactory rainfall in most producing areas. The winter cereal area is estimated up 6.8 percent. Assuming normal weather for the remainder of the season, wheat output in 2003 is expected to rebound to about 22 million tonnes, and that of barley to about 7 million tonnes. The 2003 rice crop has already been harvested and output is officially estimated at a near-record low of just 408 000 tonnes, down about 70 percent from the 2002 level because of reduced irrigation supplies on account of last year's drought.

## COUNTRY REPORTS

### AFRICA

#### **NORTHERN AFRICA**

##### ALGERIA (4 August)

Harvesting of the 2003 cereal crops is well advanced and aggregate output is provisionally forecast at a high 4.2 million tonnes, a significant recovery from the previous year's 1.9 million tonnes, when the crops were affected at growth, in particular, by delayed seasonal rains. The recovery in 2003 is mainly due to beneficial rains at planting and adequate weather conditions throughout the development period. Some 3.0 million tonnes of wheat are anticipated, which compares to the past 5-year average of 1.6 million tonnes and the volume of 1.5 million tonnes collected in 2002. Production of barley, mainly used for feed, is expected to be average.

Wheat imports in marketing year 2003/04 (July/June) should decrease from the previous year's volume of 4.8 million tonnes to about 4.3 million tonnes, reflecting the increase in 2003 production. Maize imports are also expected to decrease from 1.7 million tonnes to some 1.6 million tonnes in marketing year 2003/04 (July/June).

##### EGYPT (4 August)

Harvesting of the 2003 wheat crop has been virtually completed while that of maize is underway. Production of wheat should be about 6.8 million tonnes, compared to the past 5-year average of 6.4 million tonnes and 2002 production of 6.6 million tonnes. The increase is due to the combination of a modest increase in wheat plantings with respect to the previous year, in line with the Government's programme to help increase production, and the normal to abundant rains that have benefited the crops throughout the season. Maize output should be average, while an above-average barley output is anticipated. Production of paddy is also expected to be above average thus helping increase the country rice exports.

Despite the increase in wheat production, wheat imports in marketing year 2003/04 (July/June) are expected to remain at the same level as the previous year's volume of 6.5 million tonnes, thus reflecting the strong domestic demand. Maize imports are also forecast to increase from 5.3 million tonnes to 5.4 million tonnes in marketing year 2003/04 (July/June).

##### MOROCCO (4 August)

Harvesting of the 2003 winter cereals has been completed and wheat production is provisionally estimated at a record 5.4 million tonnes, a tremendous increase from the above-average volume of 3.4 million tonnes collected in 2002. Production of barley is also provisionally estimated at a record 2.6 million tonnes. The increase is principally the result of the favourable rainfall pattern which has prevailed at planting and during growth throughout the main producing areas, together with the improved use of fertilizers and other agricultural inputs.

Wheat imports in marketing year 2003/04 (July/June) are forecast to decline, as a consequence of the increase in production, from 2.7 million tonnes imported last year to about 1.3 million tonnes. Maize imports should remain at the same level of 2002/03 (July/June) imports of 850 000 tonnes.

##### TUNISIA (4 August)

Harvesting of the 2003 wheat and barley crops has been completed and satisfactory outputs collected. Production of wheat is estimated at 1.3 million tonnes, which compares to last year's

drought affected crop of only 423 000 tonnes and to the past 5-year average of 1 million tonnes. Barley output is put at nearly 620 000 tonnes, well above last year's 90 000 tonnes and the past 5-year average of 257 000 tonnes. The significant recovery is the result of the favourable rains and weather conditions that have benefited the crops throughout the season.

Wheat imports in marketing year 2003/04 (July/June) are expected to drastically drop from the previous year's high 1.8 million tonnes. Imports of maize are also forecast to decline from 750 000 tonnes to some 700 000 tonnes.

## **WESTERN AFRICA**

### **BENIN (2 August)**

Following first rains in the southern part of the country in March, precipitation progressed northwards and covered the entire country in April, allowing land preparation and planting to start. However, in the south, rainfall decreased significantly from May on and remained generally below average, which may have affected crop development. Precipitation has been generally widespread and abundant in the north.

Following well above average cereal harvest in 2002, the overall food supply situation in Benin is satisfactory. Markets are well supplied and prices of cereals are generally stable. Cereal imports for domestic use and re-exports during the 2003 marketing year are estimated at 140 000 tonnes and food aid requirements at 15 000 tonnes.

### **BURKINA FASO (2 August)**

Following first significant rains in early April in the south and south-west, precipitation progressed northwards over the entire country in May and remained generally widespread and abundant in June. Although rains decreased somewhat in mid-June and late July, crops are growing satisfactorily. They are generally in the leafing stage in the Sudanian zone and tillering in the north and the Sahelian zone. Pastures are regenerating well, improving livestock condition.

Following the 2002 record harvest, the overall food supply situation is satisfactory. However, the returnees and refugees from Côte d'Ivoire as well as people living in the food-deficit Northern and Sahelian zones will continue to need food assistance. Pastoralists are particularly affected in these zones, due to continuous drop in livestock prices.

### **CAPE VERDE (14 August)**

**The start of the rainy season is delayed. The weather remained mostly dry until late July on most islands. This situation may seriously affect crop production as planting of maize normally starts in July.**

**A joint FAO/WFP Crop and Food Supply Assessment Mission in October 2002 estimated maize production at some 5 000 tonnes, only one fourth of the good 2001 harvest and similar to the poor crops in 1997 and 1998. The Mission estimated cereal import requirements for the marketing year 2002/03 (November/October) at 108 518 tonnes, of which 33 250 tonnes were expected to be imported commercially, leaving a food aid requirement of 75 268 tonnes.**

**A follow-up joint FAO/CILSS mission in January 2003 found that the Government had launched food for work programmes to improve access to food for the poor. However, the programmes are under-funded. Cape Verde is a beneficiary of WFP's Regional EMOP launched in December 2002 for 5 drought-affected countries in the west of the Sahel, with an allocation of 2 400 tonnes of food.**

#### CHAD (6 August)

Following first rains in mid-April in the Sudanian zone, precipitation progressed northwards to the Sahelian zone in June and remained generally widespread and abundant. Crops are developing satisfactorily. Millet and sorghum crops are tillering in the Sahelian zone. They are growing satisfactorily in the Sudanian zone. Soil moisture reserves are abundant. Pastures have regenerated countrywide.

The overall food supply position is satisfactory. However, the food situation is reportedly deteriorating in the food deficit areas of Kanem and Tandjilé. Assistance to affected people is hampered by difficult access due to poor road network. WFP has started providing food assistance to an estimated 41 000 people who have fled into the country to escape fighting in Central African Republic.

#### COTE D'IVOIRE (2 August)

Following the start of rains in late February, abundant precipitation covered the entire country during April. However, rains decreased and remained generally below average from May on, which may have affected maize development in the south and millet and sorghum crops in the north. Agricultural production is not expected to reach its pre-crisis level this year due to mass population displacement and likely seeds shortages, following the civil war.

Although the overall security situation has started to improve, the food situation in the country remains critical, mainly in the west and rebel-controlled north. There are grave concerns about the humanitarian situation in the west, where hundreds of people have been emerging from the bush since French and West African peacekeeping troops were sent into the area in late May. Most of the children and women showed signs of malnutrition. WFP is facing a gap in donor funding for food supplies in the region and there is no functioning healthcare system. Humanitarian assistance falls short of current needs and an escalation in malnutrition, morbidity and mortality rates is feared. The humanitarian situation has been aggravated by the dire situation in Liberia which prompted a new influx of over 30 000 refugees. In the rebel-controlled north, access to food is very difficult for cotton farmers who were unable to sell their crop because of the conflict.

More than 1 million people have been displaced by the conflict. At least 800 000 people fled south from the north and centre and about 300 000 were displaced in the west around the city of Man. Another 200 000, mostly migrant workers from neighbouring Burkina Faso, Guinea, Liberia and Mali left the country. WFP has launched a Regional Emergency Operation to assist 588 600 people in Côte d'Ivoire and 275 000 people in transit/returnees to neighbouring countries (Ghana, Burkina Faso and Mali) for a period of 8 months (May-December 2003).

#### GHANA (2 August)

Following first rains in the southern part of the country in mid-March, precipitation progressed northwards and covered the entire country in April, allowing land preparation and planting to start. However, rainfall has been mostly below average, with a three weeks dry spell in May followed by another break in July. This dry spell caused germination failures, necessitating replanting, and possible crop water stress in several regions. Due to erratic rains and initial dry conditions, in the north of the country, full maturity in the crops can only be reached if precipitation continues to fall until October

Aggregate 2002 cereal production has been estimated at some 2.15 millions tonnes, 26 percent above last year. Production of root crops also increased significantly. As a result, the overall food supply situation is satisfactory. Real prices in Cedi have even decreased for most staple commodities. However due to erratic 2003 major rains, which has compromised overall yield potential and deteriorated crop prospects, the food supply situation is likely to tighten in the next few months.

The effects of the crisis in Côte d'Ivoire and Liberia on Ghana have mainly been an influx of third-country nationals in transit to their home countries, Ivorians and Liberians seeking asylum and the return of Ghanaian nationals. An estimated 70 000 people have entered Ghana from Côte d'Ivoire since September 2002, while renewed fighting in Liberia has prompted a further influx of thousands of refugees and returnees. The capacity of the Government, the humanitarian community and host communities to respond to their needs is reported to be under heavy strain.

#### **GUINEA\* (2 August)**

Following first rains in the south in late March, precipitation covered the entire country in May, allowing land preparation and first plantings. However, rains decreased significantly and remained well below average from May on, which may have affected rice crops.

The presence of a large refugee population and the persistent instability in neighbouring countries have exacted a heavy toll on the country, which currently hosts more than 100 000 Liberians and Sierra Leonean refugees. By September 2002 when the civil war erupted in Côte d'Ivoire, Guinea was thought to be housing some 92 500 refugees, of whom about 55 percent were Liberian and 45 percent Sierra Leonean. The outbreak of civil war in Côte d'Ivoire generated a further 98 479 arrivals including 14 291 Liberians, 11780 Ivorians, 13971 third country nationals and 58 436 Guinean evacuees. The sudden return of the latter strained domestic resources. While some 22 500 Sierra Leonean have been repatriated during the first half of 2003, renewed fighting in Liberia has prompted a new influx of thousands of refugees. In addition, there are still some 82 000 IDPs in the country, displaced by the armed conflict over the period September 2000 to March 2001. The United Nations Children's Fund (UNICEF) appealed in early May for a further US\$3.1 million to help refugees in Guinea and Guineans displaced within their own country in view of a weakening economy and continuing conflict in neighbouring Côte d'Ivoire and Liberia.

#### **GUINEA-BISSAU (6 August)**

Rains were generally well distributed and regular in July. However, crop prospects have been compromised by large-scale grasshopper infestations on sorghum, maize and millet crops in Gabu, Bafata and Oio regions. Over 50 percent of cereal production across the north is officially estimated to be at risk. In early August, the Government launched an appeal for international assistance to control the infestation and mitigate damage on crops.

The overall food supply situation remains satisfactory. However, people living in the chronically food deficit areas along the northern border with Senegal continue to need food assistance.

#### **LIBERIA\* (19 August)**

The humanitarian situation remains alarming. Due to protracted fighting in Monrovia, hundreds of thousands of people have sought refuge in makeshift shelters across the city, leaving them without any access to adequate food supplies and in urgent need of assistance. There were an estimated 300 000 Internally Displaced Persons (IDPs) scattered in almost 100 temporary shelters in the city including churches, schools, stadiums, etc without running water or food and need urgent assistance, but as long as the fighting continued it was impossible to get supplies to them. According to OCHA, as of late July, an estimated 50 000 IDPs remained in the old camps of Brewerville (Blamese, Plumkor, and Seigbeh). In Bong County, there were 56 000 internally displaced persons in Totota and 35 000 in Salala. In Margibi County, there were 6 800 IDPs in Kakata camp, and in Grand Bassa County, there were an estimated 11 000 internally displaced persons in Buchanan. In addition to IDPs there are 14 000 Sierra Leonean refugees in Monrovia and in refugee camps in the Brewerville area. The humanitarian community has no access to an estimated 20 000 Sierra Leone refugees scattered in Cape Mount and Lofa counties. There are approximately 20 000 Ivorian refugees

and third country nationals in Grand Gedeh, Nimba and Maryland counties, who are also trapped in the fighting in eastern Liberia. There is no information on their condition or exact whereabouts. Thousands entered Sierra Leone and western Côte d'Ivoire. Internally displaced persons and refugees in Monrovia are living in overcrowded shelters with poor water supply and sanitation, which has led to the outbreak of diseases such as diarrhoea and cholera.

Humanitarian assistance is seriously hampered by insecurity. WFP international staff was evacuated, but national staff remained and distributed food to more than 100 000 IDPs, until WFP operations were suspended on 18 July due to the intensity of fighting. As of late July, the Freeport of Monrovia, where WFP's office and warehouses are located, remains under the control of Liberians United for Reconciliation and Democracy (LURD) rebels. Following the rebel withdrawal in mid-August and the improvement of the overall security situation, WFP is planning to send 9 000 tonnes of food per month to feed an estimated 500 000 people, most of them in Monrovia.

#### MALI (3 August)

Following first rains in the extreme south in April, precipitation progressed northwards in May and remained generally widespread and regular. Cumulative rainfall as of late July was above average in most meteorological stations. Crops are developing satisfactorily in all agricultural zones. Millet and sorghum crops are in the tillering/leafing stages. Irrigated rice is now being transplanted. Soil moisture reserves are adequate. Pastures are generally good.

The overall food supply situation is satisfactory. In July, 24 873 tonnes of cereal have been distributed to 921 210 people in Kayes, Koulikoro, Mopti, Tombouctou and Gao regions. Subsidized sales of 8 000 tonnes of animal feeds in the north and the Sahel zones helped improve livestock condition affected by limited availability of pastures.

#### MAURITANIA (3 August)

Following first rains in June in Brakna, Gorgol, Hodh El Chargui and Guidimakha, precipitation decreased somewhat in early July but improved significantly from mid-July in most agricultural zones. Following these good rains, plantings are well underway in most agricultural zones.

Approximately 420 000 people throughout Mauritania have required food assistance, as a result of three consecutive poor harvests. In March 2002, WFP launched an EMOP valued at US\$ 7.5 million to assist 250 000 people most threatened by food shortages. A Regional EMOP jointly approved by FAO and WFP in mid-December for five drought-affected countries in the west of the Sahel (Cape Verde, The Gambia, Mali, Mauritania, Senegal) included an allocation of 43 632 tonnes of food for Mauritania. As of late June, 78 percent of this amount was covered by pledges.

Distributions of emergency food aid and subsidized sales of wheat helped improve the food supply situation in Aftout, the Senegal River Valley and the central plateau area of Hodh El Chargui and Hodh El Gharbi where near-famine conditions and high malnutrition rates and related diseases have been reported.

#### NIGER (4 August)

Rains increased progressively in July towards the north of the agricultural zones. Although they decreased somewhat in a few locations in the south, precipitation was generally widespread and cumulative rainfall as of late July was above last year's level in most meteorological stations. Almost all the villages have now done their plantings. Millet and sorghum are flowering in Dosso and Zinder regions. Crops are developing satisfactorily. Soil moisture reserves are adequate. Pastures are regenerating on a large scale.

The overall food supply situation is satisfactory, as a result of last year's good harvest. Markets are well supplied. Fresh beans are already available in Maradi and Zinder.

#### NIGERIA (4 August)

Prospects for the current main season crops are generally favourable following good rains so far. Moreover, paddy output is forecast to increase this year reflecting higher producer prices due to a rise in import duties imposed by the Government, which also set up a national rice security task force to boost local rice production.

The overall food supply situation is stable. However, some population groups estimated to number some 750 000 people in the states of Benue, Nasarawa and Taraba remain food insecure following ethnic and religious conflicts in the last two years.

#### SENEGAL (19 August)

Early crop prospects are uncertain reflecting late and limited rains in the centre and the north until late July. Following early rains in the extreme south-east in May, precipitation progressed slowly to the centre. As of mid-July, estimated cumulative rainfall totalled 40 to 60 percent of normal in much of Senegal's groundnut basin and mostly dry conditions still prevailed in the north. Although western and eastern parts have received beneficial rainfall during the past few weeks, the weather remained generally dry in the centre and the north until early August, when heavy rains and floods on 9 August caused considerable casualties in several localities.

Aggregate cereal production in 2002 is estimated at about 851 300 tonnes, 11 percent less than the previous year and 8 percent less than the average of the previous five years. Groundnut production, the main source of cash income for rural households, was estimated at some 260 700 tonnes, 71 percent below 2001 and 65 percent below average. Following this poor harvest, access to food is very difficult for rural households, notably in groundnut producing areas, although cereal prices which increased sharply last year have decreased somewhat, owing mainly to increased commercial rice imports.

In response to the tight food situation, the Government distributed about 54 000 tonnes of rice to rural households in 2002, and has just launched a new assistance programme including the distribution of 50 000 tonnes of rice and 13 000 tonnes of animal feeds, as well as subsidized sales of maize and groundnuts seeds which are also being distributed under an FAO project. Senegal is a beneficiary of WFP's Regional EMOP launched in December 2002 for 5 drought-affected countries in the west of the Sahel, with an allocation of 3 000 tonnes of food for 23 300 most affected people.

#### SIERRA LEONE\* (4 August)

**Early crop prospects are unfavorable due to below normal rains and extended dry spells which affected crop development in parts, damping optimistic crop prospects earlier related to improved security situation and increased plantings by returning refugees and displaced farmers.**

**The food supply situation is still satisfactory, reflecting last year's increased harvest. The humanitarian situation in the country has also improved significantly following the end of the civil war. In 2002, over 100 000 Sierra Leonean refugees and 124 000 IDPs returned to their home areas. However, civil strife in Liberia has caused tens of thousands of Liberians to cross into the country.**

#### THE GAMBIA (2 August)

Following first rains in early June which permitted land preparation and first plantings, precipitation covered the entire country during the third dekad and remained generally widespread and regular in July. Reflecting these good rains, coarse grains and upland rice crops are developing satisfactorily.

Cereal production in 2002 is officially estimated at 139 000 tonnes, 30 percent lower than last year and 7 percent below the average of the last five years. Groundnut output also decreased steeply. Although cereal prices which increased sharply last year have decreased slightly, mainly in response to increased commercial rice imports, access to food for many households is still very difficult, notably in groundnut producing areas.

#### TOGO (4 August)

Prospects for the 2003 main season crop are uncertain due to below average rainfall in June and July in most regions.

Reflecting generally favourable growing conditions during the 2002 rainy season, the aggregate 2002 cereal production is estimated at 740 519 tonnes, slightly above last year's level but 7 percent above average. The overall food supply situation is satisfactory. Cereal imports for domestic use and re-exports during the 2003 marketing year are estimated at 160 000 tonnes, to be covered commercially.

### **CENTRAL AFRICA**

#### CAMEROON (4 August)

Prospects for the current main season crops are generally favourable, reflecting abundant and widespread rains. Production is expected to increase also in the northern regions located in the Sahelian zone, which experienced erratic rains and localised reduced harvests last year.

Following an average 2002 cereal production, estimated at about 1.3 million tonnes, the overall food supply situation is satisfactory. Cereal import requirements for 2003 marketing year are estimated at some 367 500 tonnes, anticipated to be mainly covered commercially.

#### **CENTRAL AFRICAN REPUBLIC (4 August)**

**Precipitation has been generally widespread and abundant since March. However, food production is not expected to increase this year due to persistent insecurity, notably in the north, and seed shortages. A joint WFP/FAO/UNICEF emergency assessment mission that visited the most affected areas in early May estimated that only 50 percent of the fields were effectively planted compared to normal years.**

**The food security situation is still precarious following civil strife between October 2002 and March 2003. Widespread destruction of physical assets, looting, and population displacement have disrupted agricultural and economic activities. In mid-March WFP re-launched its appeal for US\$ 6.1 million, having received no pledges for its original appeal two months earlier. It is estimated that over 230 000 people have been displaced from their homes, including an estimated 41 000 who have taken refuge in Chad.**

#### **CONGO, DEMOCRATIC REPUBLIC OF\* (25 July)**

**Heavy fighting in Bunia, the main town of Ituri District in the past months forced thousands of people to flee south to North Kivu Province, seeking refuge around Butembo, about 200 km south of Bunia. Many of these people has been forced to flee several times losing all**

their goods and possessions. As a result of the influx of refugees, the already precarious food situation of people in Butembo has deteriorated further. WFP food stocks in the area have been looted during clashes between various armed groups, while denial of access to beneficiaries by local authorities prevented large-scale food distribution. Emergency food and health assistance are urgently needed.

#### **CONGO, REP OF (4 August)**

Growing conditions are generally satisfactory for maize and root crops. However, insecurity continues to disrupt agriculture and rehabilitation. A resurgence of fighting in the Pool region (surrounding the capital Brazzaville) in March 2002 led to the displacement of at least 74 000 people, but the exact number is unknown as most areas in the region were inaccessible to humanitarian agencies. Following a peace agreement between the Government and rebels in mid-March 2003, a full-scale humanitarian mission visited the region from 28 May to 7 June, in order to identify the main humanitarian needs, with the objective of facilitating the eventual return of IDPs. WFP is facing a serious shortfall in resources and has stopped all rehabilitation programmes in order to concentrate on emergency assistance to the most vulnerable.

#### **EQUATORIAL GUINEA (4 August)**

Crop prospects are favourable, following generally widespread and abundant precipitation since March. The staple crops are sweet potatoes, cassava and plantains. The country imports on average 5 000 tonnes of rice and 10 000 tonnes of wheat.

#### **GABON (4 August)**

Growing conditions are generally satisfactory. The main foodcrops are cassava and plantains but some maize is also produced (average 31 000 tonnes). The country imports commercially the bulk of its cereal requirement, estimated at around 88 000 tonnes in 2003.

#### **SAO TOME AND PRINCIPE (4 August)**

The staple foodcrops are roots, plantains and tubers. There are no reports of any threat to food security.

### **EASTERN AFRICA**

#### **BURUNDI\* (28 July)**

A recent Ministry of Agriculture/Ministry of Health/FAO/WFP/UNICEF assessment mission at local level, estimated the 2003 B foodcrops at 176 000 tonnes of cereals and 184 000 tonnes of pulses, a decline of 3 percent and 1 percent from last year's same season respectively. Production of roots and tubers decreased by 1 percent to 899 000 tonnes and that of bananas and plantains by 6 percent. The start of the rainy season was delayed but subsequent precipitation was adequate for crops development. Despite the overall satisfactory weather conditions, production this season was affected by persistent insecurity in central and western parts (provinces of Gitega, Muramvya, Kayanza et Bubanza Ruyigi and Bujumbura-rural), which resulted in reductions in plantings and yields. The 2003 output of coffee, the main cash crops for small farmers, is estimated 78 percent lower than in the previous year and one of the lowest of the past 40 years.

#### **ERITREA (18 August)**

The 2003 main "Kiremti" rainfall season started around mid-June and is reported to be erratic. Heavy rains in Northern Red Sea region and recently in western parts of the country caused severe flooding that caused damage to crops and property. However, overall rainfall and particularly in the main cropping areas of Debub and Gash Barka remains below average. The smaller spring (Azmera) rains from March to May were also generally inadequate and coupled with shortages of agricultural inputs, such as draft animals and seeds, have resulted in slow start of the season. These short rains are beneficial for early preparation of land and replenishment of pasture.

Recent reports indicate that prices of cereals are still very high but started to stabilise. The terms of trade for pastoralists were reported to be improving. However, the overall food situation remains severe with as many as two-thirds of the country's population facing severe food shortages due to last year's drought. Of these, about 1.4 million were reported to be in need of emergency food assistance. In addition, humanitarian assistance continues to be needed for large numbers of people internally displaced by the war with neighbouring Ethiopia, returning refugees from Sudan, and children benefiting from WFP's Emergency School Feeding Programme.

Recent pledges to earlier appeals for emergency food assistance are encouraging. However, new commitments and speedy deliveries are needed to cover for the requirements until the next harvest in October/November. As of end July nearly 58 percent of the FAO/WFP jointly approved Emergency Operation (EMOP) in March, worth US\$ 46.5 million to assist about 900 000 people for a period of ten months (May 2003–February 2004), was pledged. Resourcing of the shortfall is essential to avoid a serious pipeline break.

#### **ETHIOPIA (4 August)**

Harvesting of the 2003 short "belg" season crops has just been completed. Overall a considerable improvement over last year's belg crop is being reported but erratic rains have affected crops in several parts of the country. Normally, the belg season crops are harvested from June to August and the crop accounts for some 10 percent of total grain production but in some areas it provides most of the annual grain production. Currently, the main "meher" cropping season is well underway in almost all parts of the country

Over the past several months, serious food shortages and high malnutrition levels were witnessed in several parts of the country, particularly in Southern Nations Nationalities and Peoples Region (SNNPR). Recent reports indicate that the total number of people in need of food assistance in 2003 has risen from 12.5 million to 13.2 million. In response to the growing food crisis in SNNPR, a United Nations Country Team Support Office (UNCTSO) was set up in the regional capital Awasa to help address the current crisis in more co-ordinated manner.

#### **KENYA (4 August)**

Harvesting of the main "long rains" cereal crops is expected to begin in late August through December, with the bulk occurring in November. Earlier unfavourable prospects due to late onset of rains in many areas were somewhat ameliorated following reports of good crop conditions in key long-rains dependent areas of the Rift Valley, Western and Nyanza Provinces. The Ministry of Agriculture and Livestock Development has revised upward estimates of this year's "long rains" maize crop from 1.8 million tonnes to 2 million tonnes. At this level the maize crop is about the same as the average for the previous five years, estimated at 1.97 million tonnes.

Above average maize prices were recorded in the last few months due to tighter supply resulting from delayed harvesting. In particular, the dramatic rise in maize prices in the last

three months have severely eroded the food security situation of vulnerable households especially in pastoral districts and marginal areas of the Coast and Eastern Provinces. The Government has recently declared that it will buy 3 million bags (270 000 tonnes) of maize from farmers aiming at boosting its stocks and regulating cereal prices. The Government normally buys maize during November from the key surplus areas and its procurement price is crucial as it affects overall market prices. The current procurement price is Ksh1 450 per 90kg bag. This compares with an average market price of about Ksh 800 per 90kg bag at harvest.

In most pastoral areas better livestock conditions were reported thus improving the overall food security situation of the population. However, continued insecurity and livestock robbery has resulted in significant livestock losses and limited access to important pastures, markets and roads. Recent assessments have emphasized that a meaningful recovery of pastoralists will require successive favourable agricultural seasons and more importantly a multi-faceted long-term food security initiative.

#### RWANDA (28 July)

A recent joint Ministry of Agriculture/FAO/WFP/ FEWS NET Crop and Food Assessment Mission at local level, estimated foodcrops production of the 2003 B season at 904 000 tonnes of cereal-equivalents, 2 percent lower than last year, but 5 percent higher than in 2001 B. The start of the rainy season was delayed but subsequent precipitation was adequate for crops development. Despite the generally satisfactory national production, some areas were affected by planting reductions, mainly the Bugesera Region, Kigali Rural Province, where large numbers of households gathered a poor harvest. Food assistance is being provided to vulnerable groups in the region by the Government and humanitarian organizations. However, shortages in the WFP pipeline are negatively affecting the assistance operations. In addition to Bugesera, some other pockets of production shortfalls have been reported by the assessment Mission, mainly in Kibungo Province and the high altitude areas of Kibuye.

#### SOMALIA (4 August)

The current "gu" season crop, about to be harvested, in southern Somalia is forecast at about 215 000 tonnes (68 percent maize 32 percent sorghum), more than a quarter above the post war average. However, latest field reports indicate that insecurity, insufficient rainfall and pests could reduce the final cereal production figure. Areas with potentially less than post-war average production include parts of Middle Juba, Bay region-in particular Qansah-Dere and Dinsor districts and parts of Hiran.

The food supply situation in Sool Plateau in the north of the country is a serious concern. A food security assessment carried out by the Food Security Assessment Unit (FSAU) indicated that 3 500 households require emergency food and complementary assistance, while another 9 000 households remain vulnerable and require close monitoring. While the Sool Plateau poses an acute problem this year, successive years of food insecurity, coupled with increasing environmental degradation, are developing into a chronic food insecurity situation that requires longer term solutions than immediate relief. A subsequent collaborative nutrition survey also indicated global acute malnutrition rates of 12.5 percent. Elsewhere in northern Somalia, the pastoral conditions were reported to be near average conditions.

#### SUDAN (18 August)

Prospects for the 2003 crops, to be harvested from September/October, are still uncertain. In southern Sudan, early indications suggest an average crop but remains to be verified through crop assessments. Heavy rainfall in July in the eastern parts of the country resulted in flash floods that killed some people and caused damage to crops and property.

The serious food shortages reported in several parts of the country are not expected to improve before harvest and for farmers affected by last year's drought such improvement will depend on a timely provision and assistance of agricultural inputs. Food security monitoring assessments conducted since January have confirmed that 1.9 million people in southern Sudan will need food assistance estimated at 101 000 tonnes until the next harvest in September/October 2003. About 700 000 of these were identified as highly food insecure and have been receiving food aid since January. In April 2003, an Emergency Operation was jointly approved by FAO and WFP worth about US\$ 130.97 million, for food assistance to nearly 3.25 million people for a period of twelve months (April 2003 to March 2004). FAO also appealed for US\$ 18.9 million in CAP 2003 to provide for humanitarian food security programme, including emergency agricultural inputs. Donor response has generally been low.

#### **TANZANIA (18 August)**

Harvesting of the 2003 main season cereal crops is almost complete. Preliminary forecasts of the 2002/03 food crop production indicate a 10 percent decline compared to last year mainly due to extended dry weather in eastern, central and southern parts between February and mid-March. Many areas experienced more than three weeks of dryness at a critical stage in crop development.

Cereal prices have more than doubled in most parts of the country contrary to last year and normal trends. A Rapid Vulnerability Assessment (RVA) carried out by the Food Security Information Team (FSIT) in June/July indicated that prolonged drought conditions in several parts of the country have particularly reduced food and cash crop output and limited wage-labour opportunities thus affecting large number of households. A food deficit of about 77 489 tonnes is anticipated during the marketing year 2003/04 with nearly 1.94 million people are estimated to require food assistance between October 2003 and March 2004. In addition, a deficit of approximately 3 200 tonnes of various seed types is anticipated as emergency seed assistance during the next planting season.

In mid-August, the Government of Tanzania announced that it will release 32 540 tonnes of food from its stocks and has appealed to donors to provide nearly 45 000 tonnes to alleviate the immediate food shortages that resulted from recent poor rains.

#### **UGANDA (4 August)**

Harvesting of the 2003 main season cereal crop is nearing completion and the outlook is mixed. Relatively wetter climate conditions in central, eastern and northern Uganda are now reported to have favoured proper cereal filling while drier than normal weather in since early June may have affected crops in north-eastern, south-western and western Uganda. Below normal rains in February and March that delayed land preparation and planting of the main season crops in several areas was somewhat compensated for by the extended rainfall through July in most central and eastern Uganda.

The humanitarian situation in northern and eastern Uganda continued to worsen with recent fighting between Government forces and rebels have displaced more than 820 000 people. WFP has recently appealed for about 100 000 tonnes of food to assist more than 1.6 million people.

## **SOUTHERN AFRICA**

### **ANGOLA (28 July)**

An FAO/WFP Crop and Food Supply Assessment Mission in May 2003 estimated that the 2003 cereal output increased 23 percent from last year's good level to 670 000 tonnes. This is the result of abundant and well distributed rains during the season, an increase in the area planted following the return of internally displaced and refugees to their areas of origin and substantial distribution of agricultural inputs.

Despite the improved food situation, the number of people in need of food assistance in 2003/04 remains high at 1.4 million. This reflects the continuing return movement of former internally displaced persons and refugees to their places of origin, and the continuing support to the ex-UNITA soldiers and their families. Besides these populations, food assistance will also be provided to socially vulnerable groups, including vulnerable resident farmers. Total food aid requirements amount to 161 000 tonnes of cereals and 17 800 tonnes of pulses. WFP plans to assist 1.02 million people.

### **BOTSWANA (28 July)**

The 2003 cereal production, mainly sorghum, is estimated at 13 000 tonnes, 48 percent below last year's crops. Despite the decline in production, the national food supply situation remains satisfactory as the country imports commercially all its cereal consumption requirements. Food aid is being distributed by the Government in areas affected by a poor harvest.

### **LESOTHO (28 July)**

An FAO/WFP Crop and Food Supply Assessment Mission in April 2003, estimated the 2003 cereal output at 89 000 tonnes, an increase of 66 percent from the previous year. However, at that level production remained below average. Cereal import requirements were calculated at 321 000 tonnes, most of it to be covered on commercial basis.

The Mission also estimated that 32 000 tonnes of cereal food aid will be needed for 270 000 people affected by localized crop failure and those affected by HIV/AIDS.

### **MADAGASCAR (28 July)**

Despite a satisfactory 2003 production of the main paddy crop, a severe drought in southern vulnerable provinces resulted in a poor harvest of maize, the main staple in the area. As a result, official estimates indicate that 600 000 persons are in need of food aid. Current reports point to an increase in the number of severely malnourished children. However, food aid distributions by WFP had to be suspended in May due to lack of resources. There is urgent need of additional food aid contributions to avoid a deterioration of the nutritional situation during the lean season from September.

### **MALAWI (28 July)**

The overall food supply is satisfactory following a substantial increase in the 2003 cereal production and unprecedented levels of maize carry-over stocks. Market prices of maize, which declined since March, have continued to decline in July. The low price of maize has improved access to basic food of large numbers of vulnerable population. The decline in prices has resulted in a reduction of the Government fixed price from 17 Meticaï/kg to 10 Meticaï/kg. The Government has also decided to export 100 000 tonnes of maize while at the same time keeping another 100 000 tonnes for the Strategic Grain Reserve.

Despite the improved food security situation, an FAO/WFP Crop and Food Supply Assessment Mission in April 2003 estimated that 400 000 people will need food aid assistance in marketing year 2003/04 (April/March), including those in areas that experienced crop failures, the HIV/AIDS-affected and the destitute. Cereal food aid requirements amount to 30 600 tonnes. In view of high levels of maize stocks in the country, the Mission recommended that they should be procured locally.

#### **MOZAMBIQUE (28 July)**

**An FAO/WFP Crop and Food Supply Assessment Mission in May 2003 estimated the 2003 cereal production at 1.8 million tonnes, some 3 percent above the good harvest of last year.**

However, in southern and some of central provinces prolonged dry spells and high temperatures caused almost total failure of the main maize crop. As a result some 949 000 people face acute food shortages in marketing year 2003/04 and are in need of 156 000 tonnes of emergency food assistance. The affected population represents 30 percent of the total population in the affected districts but only 5 percent of the country's total population. A part of the food aid requirements could be procured locally in view of maize surplus in northern and central areas but, because high internal transport cost to southern parts, large amounts will need to be imported. Prices of maize that declined in northern and central markets since February have increased in July, but they remained below the levels in southern markets.

#### **NAMIBIA (25 July)**

Latest official production estimates indicate a 2003 cereal crop of 102 000 tonnes, 38 percent above the reduced level of 2002. Despite the overall recovery in this year's output, the harvest was sharply reduced for the second consecutive year in the Caprivi region, which was affected by severe dry weather.

The national cereal import requirements have declined from last year to 108 000 tonnes, to be covered on commercial basis.

#### **SOUTH AFRICA (25 July)**

The final official production estimates indicate a 2003 maize crop of 9.270 million tonnes and a sorghum crop of 186 700 tonnes. At this level, the aggregate coarse grain crop is lower than in 2002 but average. Export availability is expected to remain around last year's level.

#### **SWAZILAND (28 July)**

**An FAO/WFP Crop and Food Supply Assessment Mission in April 2003 estimated maize production at about 73 000 tonnes, This is 6 percent above the poor crop of last year but still 30 percent below the average level. Cereal import requirements have increased to 128 000 tonnes, including 24 000 tonnes of food aid. The reduced output mainly reflects a poor harvest in the Lowveld region affected by dry weather during the growing season.**

Although at national level no cereal shortages are foreseen in 2003/04, due to improved commercial import capacity and lower prices in South Africa, the Mission estimates that 217 000 people face food shortages and are in need of food assistance. Food aid requirements total 24 000 tonnes of cereals.

#### **ZAMBIA (28 July)**

An FAO/WFP Crop and Food Supply Assessment Mission in May estimated the 2003 cereal production at 1.32 million tonnes, 80 percent higher than the reduced level of 2002 and above

average. As a result the Government has lifted the ban on maize exports and is exploring options for exporting maize surplus of 120 000 tonnes. Cereal imports requirements are limited to reduced quantities of wheat and rice in which the country has a structural deficit.

Prices of maize and mealie meal, that have declined since February-March in anticipation of the good harvest, stabilized in late June at levels well below those of a year ago. This has generally improved access to food by the vulnerable populations. The Government plans to increase the Food Reserve Agency (FRA) through local purchases and outstanding imports contracted in the marketing year 2002/03. Despite the overall improved food supply situation, pockets of people, in areas where harvest was reduced, will require targeted food assistance in 2003/04.

#### **ZIMBABWE\* (28 July)**

An FAO/WFP Crop and Food Supply Assessment Mission in May estimated the 2003 cereal production at 1 million tonnes, including forecast for the winter wheat and barley crops. At this level production is 41 percent higher than the poor level of last year but still well below average. Cereal import requirement for 2003/04 are estimated at 1.287 million tonnes, of which maize accounts for 980 000 tonnes. Given the acute shortage of foreign exchange, 610 000 tonnes need to be met through food aid for an estimated number of 4.4 million people in rural areas and 1.1 million in urban.

The Government controlled price of maize meal has been raised almost four-fold in late May. This will greatly limit access to available supplies for the most vulnerable population.

### **ASIA**

#### **AFGHANISTAN\* (1 August)**

Afghanistan is set to harvest a record level of cereals this year owing to improved precipitation, ample irrigation water availability and significantly large areas planted with cereals, in particular rain-fed wheat. An FAO/WFP joint Crop and Food Supply Assessment Mission (CFSAM) visited the country between mid-June and 8 July this year to assess the food and crop situation in the country. The Mission estimates that the country is to produce an aggregate of 5.37 million tonnes of cereals including 4.36 million tonnes of wheat, 410 000 tonnes of barley, 310 000 tonnes of maize and 291 000 tonnes of milled rice. At this level, cereal harvest is the highest on record and more than 50 percent above last year's good harvest. Cereal import requirement for the 2003/04 marketing year is, therefore, estimated at about 392 000 tonnes, which is almost a quarter of last year's import requirement. Commercial imports in the recent past have on average amounted to about half a million tonnes per year.

Despite an estimated record harvest this year, access to food for a large number of households will remain an issue, in particular the disabled, women-headed households, the returning refugees and nomadic pastoralists. The FAO/WFP Mission has also found that wheat prices in much of the country have plummeted and are near the break-even point in some areas. Consequently, the Mission has recommended that a significant proportion of the prospective food aid should be domestically procured so that the farmers are not unduly penalized through low cereal prices. The exact amount of food aid requirement for the 2003/04 marketing year will be determined by a multi-agency National Risk and Vulnerability Assessment, which is currently under way. The results of the assessment will be available in October.

#### **ARMENIA\* (31 July)**

Cereal harvest in Armenia has begun and early estimates point to a harvest somewhat lower compared with last year's. This year's aggregate cereal harvest estimated at 377 000 tonnes

is roughly 10 percent lower than last year. Aggregate cereal harvest this year includes an estimated 300 000 tonnes of wheat and some 62 000 tonnes of barley. Aggregate domestic cereal requirement for the 2003/04 marketing year is estimated at 588 000 tonnes. Armenia is a net cereal importing country. This year aggregate cereal import requirement is estimated at 211 000 tonnes, including 21 000 tonnes in food aid. This aggregate includes 185 000 tonnes of wheat and 20 000 tonnes of maize.

#### AZERBAIJAN (31 July)

Latest estimates show that the cereal harvest, which has just begun, will not exceed 1.9 million tonnes, compared with 2.2 million tonnes last year. This year's aggregate cereal harvest includes an estimated 1.4 million tonnes of wheat, 232 000 tonnes of barley and 150 000 tonnes of maize. Inadequate precipitations followed by heavy floods in spring were the main causes of lower than expected harvest this year. Aggregate cereal utilisation is estimated at about 2.5 million tonnes and the estimated import requirement of about 644 000 tonnes will be mostly commercially procured. The wheat import requirement is estimated at 620 000 tonnes for the 2003/04 marketing year.

#### BANGLADESH (31 July)

Floods and mudslides in late July have killed at least 15 people, displaced tens of thousands and resulted in substantial damage to crops and property.

Harvesting of the 'Boro' paddy crop was completed in May/June while the 'Aus' crop is being harvested. The 'Aman' Paddy crop is due for harvest from October. The aggregate output of the 2003 paddy is estimated at 39.6 million tones, 4.1 percent above the previous year, reflecting an increased use of hybrid seeds and better support to the irrigation sector.

The food supply situation remains satisfactory. The 2003/04 import requirement for total cereals is forecast to fall to 2.3 million tonnes. The Government has achieved the procurement target of foodgrain so far during the boro (summer) season ahead of the schedule by procuring some 0.7 million tonnes of rice.

#### CAMBODIA (31 July)

Planting of the rainfed main season paddy crop, usually accounting for 80 percent of annual production is just completed. The 2003 total paddy output is forecast at 4.1 million tonnes, a recovery from the previous year (3.74 million tonnes) when the crop suffered from the drought during the planting period. This output will be sufficient to maintain an adequate total cereal supply situation from a national perspective. However, with a large number of people still living below the poverty line, the country continue to be food insecure and in need of food relief.

#### CHINA (31 July)

**Heavy rain in Huai River valley in June caused the worst floods since 1991, affecting tens of millions of residents and inundating several million hectares of farmland in central, eastern, and southern China. Meanwhile, it is reported that some areas in the south suffered from drought, affecting millions of people in eight provinces.**

China is expected to harvest less rice this year with the effects of flooding and drought compounding already reduced plantings by farmers in response to weaker prices. China's 2003 rice output is currently expected to fall by over 0.9 million tonnes, to 175 million tonnes from last year. The output of early rice, already harvested in May and June, was estimated to fall 3 percent year-on-year to 29.5 million tonnes, the lowest level since 1985, due mainly to smaller acreages in response to weaker prices. The intermediate and late rice which just were planted, due for harvest in November and December, was severely affected by the drought.

**By contrast, the drought in the northeast has basically eased and there have been sufficient rains in northern maize growing areas. Latest estimates point to a maize output of 116 million tonnes in 2003, reflecting better weather in key growing areas.**

**China is the world's second largest maize exporter; exports are expected to reach 13 million tonnes in 2002/03.**

**The winter wheat harvest was completed in June while the spring wheat harvest is ongoing. Total wheat production estimates in 2003 remain at some 86 million tonnes and the country is forecast to be a net wheat importer in 2003/04.**

#### CYPRUS (4 August)

The 2003 aggregate output of wheat and barley is estimated at 97 000 tonnes, slightly below the previous five year's average. Imports of wheat in 2003/04 (May/April) are forecast at 100 000 tonnes, while aggregate imports of barley and maize are forecast at some 540 000 tonnes, unchanged from last year.

#### GEORGIA\* (31 July)

**Latest estimates point to an aggregate cereal harvest of about 627 000 tonnes, which is 48 000 tonnes below last year. The estimated aggregate cereal harvest includes some 166 000 tonnes of wheat and 400 000 tonnes of maize. Adverse weather conditions and limited access to critical agricultural inputs are the main reasons for this year's lower than expected harvest. Aggregate annual cereal requirements in Georgia amount to about 1.2 million tonnes. In the recent past Georgia has not been able to meet domestic requirements and has depended on commercial imports and food aid. The estimate for maize harvest is rather optimistic and much depends on summer weather conditions and precipitation. Cereal import requirements are estimated at 580 000 tonnes, including 120 000 tonnes in food aid.**

**The current WFP PRRO began in April 2003, which is scheduled to end by March 2006. By the end of the current PRRO 50 493 tonnes of food will have been distributed to 209 500 vulnerable people. The current PRRO aims to target Chechen refugees in Eastern Georgia (Pankisi Gorge) as well as pensioners and other vulnerable groups. Nearly 70 percent of the aggregate food aid will be distributed to 160 000 vulnerable people through food for work activities in six regions of the country.**

#### INDIA (30 July)

Heavy flooding hit India in July this year. At least 600 000 people in northeastern Assam state remain affected by floods and at least 50 people have been reportedly killed by gastroenteritis, dysentery, jaundice and malaria due to the lack of clean drinking water. In nearby Bihar state, a total of 1.9 million people remain affected by flooding in 15 districts and 97.5 million rupees (US\$2 million) of crops have been damaged.

The southwest monsoon, which is critical to the development of the kharif (fall/early winter harvested) rice crop, has covered the entire country by July 5 despite its late arrival. The total planting of rice is expected to exceed last year's level. 2003/04 marketing year rice production is forecast at about 86.67 million tonnes, 14.5 percent increase over last year, which was reportedly the worst in 15 years. India is still expected to be a large player in world rice trade, but exports are forecast down to 3.5 million tones from 3.8 million tonnes last year due to the lower carry-in stocks.

2003 wheat production, harvested in May, was officially estimated at 69.3 million tonnes, about 3.6 percent lower than last year, as a result of reduced acreage.

Excellent rains in major maize growing regions, combined with high maize prices, have resulted in increased maize planting completed in July. 2003 maize production could reach 13 million tonnes, 17 percent above the last year.

#### INDONESIA (30 July)

The main current crop in the ground is secondary/dry season paddy, due for harvest in late October. Rice has suffered from severe drought this year. Central Java is the worst hit by drought and rice fields which had dried up reached 5 423 hectares, followed by East Java (3 067 hectares) and West Java (2 720 hectares) and Yogyakarta (160 hectares). The Government has tried to reduce the disaster by pumping ground water into rice fields in areas worst hit by drought.

Indonesia, one of the world's biggest rice importers, has dropped a plan to curb imports of the grain in early July based on the estimated reduced crop this year. Rice imports for 2003/04 are expected to remain at a high level at 3.3 million tonnes.

#### IRAN, ISLAMIC REPUBLIC OF (31 July)

Wheat production in 2003 is expected to rise compared to last year mainly due to farmer's response to high Government procurement prices and favourable weather conditions. In 2002/03, Iran's wheat imports dropped to 2.46 million tonnes compared to 6.8 million tonnes in 2001/02. Imports are expected to decrease further to an estimated 1.3 million tonnes this year. Government purchases from the local farmers this year is expected to reach 9.8 million tonnes, some 1.2 million tonnes more than last year.

Maize production in 2003 is estimated to remain at last year's level of 1.25 million tonnes and imports are expected at 1.4 million tonnes, with large purchase from China.

#### IRAQ\* (4 August)

**Harvesting of winter grain (mainly wheat and barley) crop in Iraq has been completed. An FAO/WFP Crop and Food Supply Assessment Mission visited the country in June/July 2003 and the report is being finalized.**

**Agricultural productivity, particularly in the major producing regions of central and southern Iraq, has continued to suffer from limited investment, shortage of inputs and deteriorating irrigation infrastructure. Three consecutive years of severe drought (1999-2001) have also devastated agricultural production. In 2002, improved weather resulted in increased cereal production.**

**Cereals imported under the oil-for-food deal have led to significant improvements in the overall food supply situation. However, nutritional problems remained a serious problem. A Security Council Resolution on 22 May lifted sanctions imposed on Iraq and extended provisions of earlier resolutions for a six month period during which time the Oil-for -Food programme is to be terminated with transfer of responsibility for the administration of remaining activity to the Authority in Iraq.**

#### ISRAEL (4 August)

Output of the recently harvested 2003 wheat crop is forecast at about 170 000 tonnes, about 38 percent above the average for the previous five years, as a result of favourable weather conditions.

Imports of cereals in 2003/04 (July/June) are forecast at some 2.69 million tonnes, slightly lower than the previous year.

#### JAPAN (31 July)

Low temperatures and little sunshine since late June have caused a substantial delay in the growth of rice. As of July 15 the rice growth condition was poor in 20 prefectures from northeastern to western Japan.

The rice acreage is expected to be lower as the market-oriented rice policy reforms continue. Some 253 billion yen will be set aside for financial help for farmers who reduce their rice acreage in 2004, up from 243.3 billion yen this year.

#### JORDAN (4 August)

Aggregate output of wheat and barley in 2003 is forecast at 147 000 tonnes, about 20 percent above last year's crop due mainly to favourable rainfall. Domestic cereal production normally meets only a small proportion of consumption requirements, the rest being covered by imports. Imports of wheat in 2003/04 (July/June) are forecast at 840 000 tonnes, same level as last year. Coarse grain imports are forecast at 900 000 tonnes, similar to 2002/03.

#### KAZAKHSTAN (31 July)

Cereal harvest has begun and latest estimates point to a cereal harvest of about 13.2 million tonnes compared with about 15.9 million tonnes last year. Aggregate cereal harvest this year includes some 10.5 million tonnes of wheat, 1.9 million tonnes of barley and 310 000 tonnes of maize. Kazakhstan had planned to match the bumper crop of 2002 but low cereal prices last year discouraged some farmers from growing cereals while a severe winter compromised significant areas under winter cereals. Aggregate cereal exports during the 2003/04 marketing year is forecast at about 5.87 million tonnes, which is slightly below last year's exports. This year's cereal exports include 5.4 million tonnes of wheat and 389 000 tonnes of barley. Kazakhstan is the top cereal exporter in the CIS amid poor crops in Russia and Ukraine.

#### KOREA, DEMOCRATIC PEOPLE'S REPUBLIC OF\* (29 July)

**The wetter weather pattern in July has helped some summer crops. Prospects for rice and maize crops are better than in 2002 and considerably better than in 2000 and 2001 at the same stage of the cropping calendar. There are pest infestations, somewhat less than reported in 2002, but nevertheless sufficient to merit some controlled treatment measures by the cooperative farm and county authorities.**

**North Korea has suffered from chronic food shortages as a result of economic mismanagement as well as a series of floods and other natural disasters in the mid-1990s, and relies on foreign aid to feed its population. In July due to a delay in the arrival of some confirmed contributions, almost 3 million beneficiaries could not receive food from WFP distributions. The 2003/04 total cereals import requirements are provisionally estimated at 1.55 million tonnes. An FAO/WFP Crop and Food Supply Assessment Mission will visit the country from the late September to early October.**

#### KOREA, REPUBLIC OF (31 July)

Heavy rains in South Korea in July have flooded rice fields and threaten production. The 2003 rice output is expected to contract due to Government programmes and unfavorable weather. The country produces only about one third of its cereal consumption requirement. Cereal imports in the 2002/03 marketing year (October/September) are estimated at 3.75 million tonnes of wheat, 8.6 million tonnes of maize and 0.5 million tonnes of other grains. The early outlook for 2003/04 is for increases in coarse grain imports, but decrease in wheat imports.

**KYRGYZ REPUBLIC (1 August)**

Cereal harvest is nearly complete in much of the country and latest estimates show that harvest will amount to about 1.5 million tonnes, which is some 500 000 tonnes lower than last year's improved harvest. This aggregate includes about one million tonnes of wheat, which is 440 000 tonnes down on last year, 320 000 tonnes of maize and 120 000 tonnes of barley. Aggregate domestic cereal utilisation is estimated at about 1.8 million tonnes. The deficit will be covered mainly through commercial imports totalling 187 000 tonnes, mostly wheat (175 000 tonnes). This year's reduced harvest has been reportedly caused by lower than average precipitation during winter and spring.

**LAOS (31 July)**

Planting of the 2003 paddy crop has been completed and is due for harvest from the end of September through December. This crop accounts for about 85 percent of annual cereal production and is predominantly grown in the Mekong River basin. The 2003 paddy output is forecast at 2.5 million tonnes, up some 3.7 percent from the previous year, reflecting the recovery in rice area. 2003 rice import requirement is projected to fall to 30 000 tonnes, same level as previous year.

**LEBANON (4 August)**

The output of the 2003 wheat and barley, estimated at about 84 000 tonnes, is slightly lower than average. The country depends heavily on imports (around 90 percent) to meet demand for rice, sugar and milk powder.

Imports of cereals - mainly wheat - in 2003/04 (July/June) are forecast at some 790 000 tonnes, slightly higher than the previous year.

**MALAYSIA (31 July)**

Harvesting of the secondary irrigated paddy crop is ongoing. The aggregate 2003 paddy output is estimated at 2.4 million tonnes, 14.8 percent higher than the 2002 crop, as a result of higher acreage and higher yield. The 2003/04 rice import requirement is reduced to 500 000 tonnes from 640 000 tonnes last year.

The country's consumption requirements of wheat and maize are virtually all covered by imports, which are estimated at 1.4 million tonnes for wheat and 2.5 million tonnes for maize in 2003/04, about the same as the previous year.

**MONGOLIA\* (31 July)**

**Heavy rains and hailstorms in July pounded northern Mongolia and killed at least 18 people and destroyed more than 100 homes. At least 10 people in the capital, Ulan Bator, were killed. Roads and bridges in the remote north were also reported destroyed. The storms were reported the worst in the country experienced since 1982. Mongolia is generally known to suffer from drought rather than flooding and in recent years has been devastated by a repeated cycle of drought in the summer and harsh winters that have devastated the economy of the country.**

**Wheat production due for harvesting in September is forecast at 141 000 tonnes, 11 percent below the previous year. The 2003/04 total cereal import requirement is estimated at 248 000 tonnes, accounting for about 63 percent of total domestic consumption. Given that the country has a serious balance of payment problem, commercial imports will only cover part of this requirement and allocation of food aid will be necessary to meet the deficit.**

#### MYANMAR (31 July)

The Myanmar Government has introduced recently a new paddy purchase policy to protect farmers' interests and raise their incentive to produce. In the past, the Government purchased paddy from farmers at a price lower than the market level. Myanmar has a cultivated area 10.12 million hectares, of which over 6 million hectares are covered by paddy. The output of paddy, planted in June and due for harvesting in November is forecast at 23.5 million tonnes, about 3 percent higher than the previous year. The country is expected to maintain self-sufficient in total cereals in 2003/04.

#### NEPAL (31 July)

The monsoon arrived on 10 June resulting in floods and landslides, affecting 31 out of Nepal's 75 districts. As of 28 July, it is reported that some 5 000 families have been affected, 60 people have died, 134 injured, while 10 are still missing, 486 houses were destroyed, and 836 damaged. The impact on agriculture has not yet been reported/assessed.

The planting of the 2003 rice crop is underway and due for harvest in November-December. The outcome of the harvest is provisionally forecast at 4.15 million tonnes in 2002, similar to the output of the previous year. Harvesting of maize is underway and the 2003 maize output is estimated at 1.44 million tonnes, some 5 percent below the bumper crop last year, but still 1 percent above average.

#### PAKISTAN (30 July)

The death toll in Pakistan has reached at least 100 after the worst flooding in a decade hit the southern region. More than 650 000 people in Sindh province are reportedly affected and currently in relief camps. In addition, nearly 10 000 people have been affected by flooding in neighbouring Balochistan province, which, like Sindh, had been suffering from years of drought.

The 2003 wheat crop harvested in April-May is estimated at 19.3 million tonnes and the 2003/04 wheat import requirement is forecast at 1.8 million tonnes. The planting of paddy is completed and the output of 2003 paddy is forecast at 6.4 million tonnes, 1.7 percent higher than last year. 2003/04 rice exports are expected to decrease to 1.6 million tonnes from 1.8 million tonnes in the last year.

#### PHILIPPINES (31 July)

**The powerful Typhoon Imbudo (Philippine name: Harurot) hit vast agricultural lands in northern Luzon in the Philippines and caused some 2 billion pesos (US\$37 million) crop damage. In worst-hit Isabela province in northeastern Cagayan Valley region alone, crop damages are estimated to be more than 1 billion pesos. The Department of Agriculture estimated damage to maize at 446 000 tonnes from Imbudo, but to rice was minimal at 78 115 tonnes. The government of Philippines may cut the minimum import tariff on maize to 20 percent from 35 percent due to prospects of a bigger production shortfall after Typhoon Imbudo. A total of 14 280 people were evacuated as a precautionary measure. The Philippine government has not released any request for international assistance.**

#### SAUDI ARABIA (4 August)

Aggregate output of wheat and barley in 2003 is forecast at 1.89 million tonnes, similar to last year. Imports of coarse grains (mainly barley and maize) in 2003/04 (July/June) are forecast to at about 7 million tonnes.

#### SRI LANKA (31 July)

Harvesting of the 2003 irrigated Yala rice crop is underway. This crop normally accounts for one third of annual rice production, the remainder being produced during the Maha season. The

aggregate 2003 paddy production is tentatively estimated at 3.45 million tonnes, about 20 percent increase from the previous year's level. The availability of some paddy lands in the north-east has resulted in an increase of the area to paddy crop. The peace process underway between the Government of Sri Lanka and the Liberation Tigers of Tamil Eelam has enabled farmers to recultivate paddy lands previously abandoned due to the conflict.

#### SYRIA (4 August)

The output of just harvested wheat crop is forecast at 4.5 million tonnes about 6 percent below last year's good crop but 16 percent above the average for the previous five years. The barley harvest is also estimated to be above average.

Imports of cereals, mainly wheat, in 2003/04 (July/June) are forecast at about 950 000 tonnes.

#### TAJIKISTAN\* (31 July)

**Tajikistan is set to harvest more than 707 000 tonnes of cereals, which is a record in the recent history of the country. This aggregate includes some 600 000 tonnes of wheat, 45 000 tonnes of rice and 32 000 tonnes of barley. Last year, the country produced some 612 000 tonnes of cereals, which was also a record harvest. Despite a record harvest this year, Tajikistan cannot meet its domestic cereal requirements, which is estimated at about 1.1 million tonnes. Cereal import requirement is, therefore, estimated at about 456 000 tonnes, including 103 000 tonnes in food aid.**

#### THAILAND (31 July)

Planting of the main rice crop started in June will be completed in September. The harvesting of this crop will begin in November. This crop accounts for about 75 percent of annual rice production. The remainder is produced mainly under irrigation, being planted in January-march and harvested in May-July. The 2003 output of paddy is provisionally forecast at 27 million tonnes, about 4 percent higher than the previous year, as a result of higher yield and larger area. The 2003/04 rice export is forecast at 7.7 million tonnes, higher than the previous year. Thailand's total volumes of rice exports to date have reached only 3.3 million tonnes, a fall of over 100 000 tonnes compared with this time last year. Thai Government's subsidy program of the past few years has raised rice prices in the domestic market which hurts its export competitiveness. Planting of maize completed in June is due for harvesting by August. The output of maize is forecast at 4.3 million tonnes, 1.6 percent above the previous year as a result of favorable weather and a shift in area from unattractive crops like sugar cane.

#### TIMOR-LESTE, DEMOCRATIC REPUBLIC OF (31 July)

**The major agricultural activity at present is the harvesting of the paddy crops and cassava. The 2003 production of maize, the major crop in Timor-Leste, is estimated to decline by about 34 percent to 70 000 tonnes from 106 000 tonnes last year due to the drought. The part of the shortfall in maize production will be offset by a forecast 10 percent increase in rice production, primarily due to an increase in the area under irrigation based on the FAO/WFP Crop and Food Supply Assessment Mission in May. However, the severe monsoonal flooding in June has caused widespread damage to crops, livestock, houses and roads. A detailed assessment of damage has not been made available yet, but the degraded average was reported as high as 1 261 hectares and could possibly lead to a localized crop failure.**

#### TURKEY (4 August)

Output of the 2003 wheat crop is provisionally estimated at 21 million tonnes compared to 20 million tonnes in 2002. Good winter rains and snow cover have helped boost yields. Wheat imports in 2003/04 (July/June) are forecast at 500 000 tonnes, compared to last year's 800 000 tonnes.

#### TURKMENISTAN (1 August)

Latest official reports indicate that cereal harvest, which is nearly complete, at 2.1 million tonnes will be slightly lower than last year's bumper harvest estimated at 2.3 million tonnes. The aggregate cereal harvest this year includes some 2 million tonnes of wheat and 60 000 tonnes of barley. The country of nearly 5 million people requires more than 1.9 million tonnes of cereals, including 1.87 million tonnes of wheat, to meet domestic consumption requirements. Area under cereals has steadily increased over the past few years at the expense of cotton and encroachment on virgin lands. Given the forecast harvest materializes, Turkmenistan will be able to meet domestic cereal needs and export a limited quantity of wheat.

#### UZBEKISTAN (1 August)

Cereal harvest is nearly complete and aggregate output is seen to match the bumper crop of the preceding year. Aggregate cereal harvest at about 5.4 million tonnes includes 4.89 million tonnes of wheat, 260 000 tonnes of maize and 135 000 tonnes of rice. Improved precipitation and irrigation water availability as well as sustained increase in area under cereals at the expense of cotton, have contributed to record harvest two years in succession. Uzbekistan requires some 5.2 million tonnes of cereals, mainly wheat (4.6 million tonnes) to meet domestic consumption requirements. Cereal exports are still restricted as a matter of policy, while food quality wheat (249 000 tonnes) and rice (100 000 tonnes) are imported. Food self-sufficiency is a stated Government policy.

#### VIET NAM (30 July)

Harvesting of the winter/spring paddy crop was completed in July. The 2003 output is estimated at 33.5 million tonnes, slightly lower than the record crop in the previous year.

2003/04 rice exports are forecast at 4.1 million tonnes, marginally higher than last year. Vietnam exported 2.64 million ton of rice worth \$496 million in the first seven months of this year, a year-on-year basis increase of 38.1 percent in volume and 19.2 percent in value, according to Government data. The Ministry of Agriculture and Rural Development has worked out a plan to build an export-oriented rice growing area in the Hong (Red) River Delta- the northern region's rice basket. The planned export-oriented rice growing area is designed to cover 300 000 hectares concentrating in 25 districts.

The outcome of the 2003 maize is estimated at 2 million tonnes, slightly below last year's, but above average. In a bid to attain self-sufficiency in maize, the Government plans to expand the area under maize to 1.2 million hectares by 2005 and increase the use of hybrid seeds to reach an annual production in excess of 4 million tonnes.

#### YEMEN (4 August)

Good Rainfall has generally favoured the main 2003 sorghum and millet crops, for harvest from October. Last year's cereal production was estimated at about 560 000 tonnes, about 20 percent below the average for the previous five years.

Breeding conditions for locusts are expected to be favourable in areas of recent rainfall along the Red Sea coast.

**CENTRAL  
AMERICA**  
**(including the  
Caribbean)**

**COSTA RICA (4 August)**

Torrential rains and flooding since early June continue to hit some of the Atlantic coastal areas, particularly around the city of Limon. Heavy rains and flooding, resulting in landslides and overflowing rivers, in the first half of July, are also reported in the east-central municipality of Cartago and surrounding areas. The excess rains were principally due to the vicinity of tropical storm "Claudette" in the Caribbean. Damage to urban and rural housing and infrastructure is reported. Emergency relief has been provided by local authorities to affected villagers and urban population. More heavy rains are presently forecast in the weeks ahead, typical of the hurricane season. No considerable damage has been so far reported to the developing 2003/04 cereal and bean crops. Harvesting of the first season maize crop, mostly white, is about to start and output is early forecast at a below-average 12 000 to 13 000 tonnes, closely similar to the 2002/03 crop. Production of paddy in 2003 is anticipated to be an average 280 000 to 290 000 tonnes while that of beans is expected to be a relatively low 16 000 to 17 000 tonnes, similar to the previous year.

Wheat imports in marketing year 2003/04 (July/June) are provisionally forecast at 200 000 tonnes close to 2002/03 imports. Maize imports in 2003/04 (July/June), principally yellow, are also expected to be close to the previous year's volume of some 565 000 tonnes. Imports of beans should be a relatively high 30 000 tonnes, in response to the strong demand for this staple in the population diet.

**CUBA (4 August)**

Harvesting of the important foreign exchange earner sugar cane crop was completed by the end of June. Official production estimates have not been made available yet, but a poor output of some 2.1 million tonnes to 2.3 million tonnes is provisionally estimated. This compares to an earlier forecast of some 2.7 million tonnes and to last year's production of 3.6 million tonnes. The low outturn has been mainly due to the critical shortage of agricultural inputs. Harvesting of the 2003/04 first season cereal crops has started. Average plantings are reported and outputs of maize and paddy should be about average if weather conditions permit.

Wheat imports in marketing year 2003/04 (July/June) are provisionally forecast at one million tonnes while maize imports should increase slightly from the level of 250 000 tonnes of the previous year. Rice imports in marketing year 2004 (January/December) are forecast to remain unchanged from last year at 550 000 tonnes.

**DOMINICAN REPUBLIC (4 August)**

Normal rains were reported in June with the exception of some areas in the south and southwest where no rains were registered, with consequent adverse impact on developing rainfed crops. Harvesting of the 2003/04 first season coarse grain crops is underway, while that of the 2003 paddy crop is well advanced. An above-average maize crop is anticipated while production of paddy should be well above average as in 2002. The state of the crops is good for other important food crops such as plantains, beans and roots.

A considerable decline in the use of fertilizers and other farm inputs is reported as a result of the inflationary wave which is affecting the country. A significant price increase in basic food items and other essential articles (i.e., medicines, fuel...) and services (i.e., utilities, transportation, health care) is also reported.

Wheat and maize imports in marketing year 2003/04 (July/June) are still tentatively forecast at 335 000 tonnes and some 700 000 tonnes respectively. Imports of beans are expected to be about 30 000 tonnes in order to meet the high demand for this staple, which together with rice make for the basic food items in the population's diet.

#### **EL SALVADOR (4 August)**

Heavy rains, typical of the hurricane season, have been reported in July, with some slight damage to rural infrastructure. More heavy rains are forecast and preventive measures are being taken to cope with likely flooding in those localities at risk. Harvesting of the 2003/04 first season maize crop, the main cereal crop, is about to start and some 640 000 tonnes to 650 000 tonnes are early forecast, which compares to the past 5-year average of 600 000 tonnes. Production of sorghum is expected to be about average. Harvesting of the bean crop is also about to start and an average output is anticipated. Food assistance from the international community will continue to be provided until February 2006 (World Food Programme's Protracted Relief and Recovery Operation 10212.0) to families affected by the natural disasters that for the past 5 years have hit the country. The assistance will be in particular support of affected women and children. The assistance provided will also help mitigate the adverse effects of economic shocks of recent years and should contribute improve household food supply. The number of people to benefit from this programme is estimated at about 100 000 per year.

#### **GUATEMALA (4 August)**

Heavy rains and flooding are reported early in July in various parts of the country, particularly in the southeast, resulting in landslides with serious damage to rural housing and infrastructure. The capital of the country and surroundings were also affected by the intense rains. Damage to the grain crops is reported in some localities.

Harvesting of the 2003/04 first season cereal crops, mainly maize, is about to start. The outlook is good so far and an average maize production is expected. Food assistance from the international community will continue to be provided until February 2006 (World Food Programme's Protracted Relief and Recovery Operation 10212.0 ) to families affected by the natural disasters that for the past 5 years have hit the country, in particular women and children. The assistance provided will also help mitigate the adverse effects of economic shocks of recent years and should contribute improve household food supply. Some 200 000 persons per year are expected to benefit from this programme.

#### **HAITI (4 August)**

Harvest of the 2003/04 first season rainfed maize crop and sowing of the sorghum crop are underway. Harvest of the important irrigated paddy crop is about to be completed while that of the rainfed crop is about to start. Average plantings are reported and outputs should be about average provided normal weather conditions prevail.

Wheat imports in marketing year 2003/04 (July/June) are provisionally forecast to remain similar to the volume of 295 000 tonnes imported in the previous year, while maize imports are expected to be about 65 000 tonnes, slightly below the level of 2002/03. Rice imports in 2004 (January/December) should be about 230 000 tonnes.

Food assistance from the international community continues to be distributed to some 132 000 beneficiaries, particularly in the recurrent drought-affected areas of the north-west and some locations of the Central Plateau (WFP's PRRO 10275.0). A seed distribution project for small farmers for planting in the next season, starting in September, is about to start.

#### **HONDURAS (4 August)**

Heavy rains and flooding have been reported in the first half of July, particularly in the Atlantic coastal areas, principally as a consequence of the passage of tropical storm "Claudette" in the Caribbean. An overflown mountain brook some miles away from San Pedro Sula, in the northwest, incurred serious damage to village housing and flooded prosperous maize fields. More heavy rains, typical of the hurricane season, are forecast. Harvesting of the 2003/04 first season cereal crops, principally maize, is about to start and an average output is tentatively forecast. The area planted is reported average but production will largely depend upon the intensity of the rains in the immediate few weeks. Food assistance from the international community will continue to be provided until February 2006 (World Food Programme's Protracted Relief and Recovery Operation 10212.0 ) to families affected by the natural disasters that for the past 5 years have hit the country. The assistance will be focused on women and children. The assistance should also contribute alleviate the adverse effects of severe economic shocks of recent years and help improve household food supply. The annual number of beneficiaries is estimated at about 240 000.

#### **MEXICO (4 August)**

Harvesting of the 2003 irrigated wheat crop in the large producing areas in the northwest has been completed and output collected is provisionally estimated at a slightly below-average 3 million tonnes. This is due to the combination of below-average plantings and lower than normal yields that have been largely caused by inadequate water supplies. Normal to abundant rains continue to benefit planting of the important spring/summer maize crop in the main producing states of Jalisco, México, Michoacán, Chiapas and Puebla. Harvesting is due from October and aggregate maize production in 2003, which includes the recently harvested output from the 2002/03 autumn/winter crop, is provisionally forecast at 19 million tonnes. This compares with the past 5-year average of 18.5 million tonnes. Sowing of the 2003 sorghum crop, for harvesting from October, continues in the west central states of Guanajato, Jalisco and Michoacán which account for the bulk of the fall harvest. Below-average plantings are expected, as farmers shifted part of their sorghum plantings to maize because of more attractive prices. Overall, sorghum production in 2003, including the recently harvested output in the largest producing state of Tamaulipas, is provisionally forecast at 5.6 million tonnes. This compares to 5.3 million tonnes collected in 2002 and to the past 5-year average of 6 million tonnes.

#### **NICARAGUA (4 August)**

Heavy rains and flooding around 10–12 July in the north-western parts, particularly in Jinotega, Matagalpa and Nueva Segovia have incurred serious damage to rural housing and infrastructure. Some damage to maize crops is also reported. The capital city of Managua was equally affected by the heavy rains. The intensive rains were largely the consequence of the passage of tropical storm "Claudette" in the Caribbean, some 400 kilometres off the Atlantic coast of the country. Some other municipalities in the same north-western parts, by contrast, and in the centre of the country received below-normal rainfall. Harvesting of the 2003/04 first season cereal crops, mainly maize, is about to start. Prospects are good and a well above-average maize output, close to the record output of 2002, is forecast. The outlook is also good for the paddy crop and for the important bean crop. An above-average output of the latter crop is anticipated. Food assistance from the international community will continue to be provided until February 2006 (World Food Programme's Protracted Relief and Recovery Operation 10212.0 ) to families affected by natural disasters of the past few years and recurrent economic shocks. Affected women and children groups will particularly benefit from this assistance. The assistance should also contribute alleviate the adverse effects of severe economic shocks of recent years and help improve household food supply. The number of people to benefit from this assistance is estimated at about 150 000 per year.

#### **PANAMA (4 August)**

Heavy rains and flooding have been reported since early July in several parts of the country, particularly in the District of Arraiján and in the surrounding areas of Penonomé. It is reported that more than 6 000 people were affected by the excess rains in the former district. Emergency relief has been distributed by national authorities. Some damage to crops and pasture is reported. More heavy rains, typical of the hurricane season, are still forecast in the weeks ahead. Harvesting of the 2003 first season cereal crops is about to start. An average maize output is anticipated while production of paddy is expected to be above average.

## **SOUTH AMERICA**

### **ARGENTINA (4 August)**

Planting of the 2003 wheat crop is underway at a pace slightly behind from a year ago. This is principally due to moisture deficits in the important producing areas in the southwest of Buenos Aires Province and in the central and southern parts of La Pampa. Official forecast puts the planted area at 6.15 million hectares but final outturn is likely to depend upon the rainfall pattern in the days ahead. The forecast points to an average wheat output of some 14.5 million tonnes which compares to the low 12.3 million tonnes harvested in 2002, when yields were considerably lower than average due to the poor use of fertilizers. Harvest of the 2003 maize crop has been completed and output is provisionally estimated at between 15 million tonnes and 15.5 million tonnes. The tight food supply situation that so seriously affected parts of the population, as a result of the economic problems faced by the country, has been largely mitigated due to the relief programmes of the Government in collaboration with international welfare organizations.

### **BOLIVIA (4 August)**

Normal weather conditions have benefited harvesting of the 2002/03 second season cereal crops and average to above-average outputs of wheat and coarse grains for the year (both seasons) have been collected respectively. Planting of the 2003/04 first season ( winter crop ) wheat crop in the eastern department of Santa Cruz has been virtually completed under satisfactory weather conditions.

Wheat imports in marketing year 2003/04 (July/June) are tentatively forecast at about 250 000 tonnes, similar to the level of imports of the previous year.

### **BRAZIL (4 August)**

Weather conditions have continued to benefit planting of the 2003 wheat crop in the main producing areas in the south. Harvesting is about to start and an early official forecast puts wheat production at a record 4.74 million tonnes, some 62 per cent up from the above-average 2.9 million tonnes harvested in 2002. The improved technology and use of fertilizers has also highly contributed to the success of the crop. The increase should help reduce the country reliance on wheat imports which, on the average, are estimated at about 7 million tonnes per year. Wheat imports are thus expected to drop considerably in marketing year 2003/04 (October/September). Harvesting of the 2003 second season ("zafrihna") maize crop has been virtually completed and a well above average 11.1 million tonnes are provisionally estimated. The first season maize crop was a bumper 34.7 million tonnes, and aggregate maize output in 2003 should be about a record 45.8 million tonnes. It is reported that measures could be taken by the Government, if necessary, to prevent a drop in domestic prices.

### **CHILE (4 August)**

Planting of the 2003 wheat crop has been virtually completed under generally dry weather conditions and a slightly above-average planted area is provisionally estimated. Harvesting of the 2003 maize crop has been completed, and an above-average 1.2 million tonnes collected. Land is

being prepared for planting of the 2004 maize crop from September. A good output of some 490 000 tonnes of oats was also harvested in 2003.

Wheat imports in marketing year 2003/04 (December/November) are early forecast to remain close to the level of 300 000 tonnes imported in the previous year. Maize imports in marketing year 2003/04 (February/January) should be about 1 million tonnes, compared to the volume of imports of 1.1 million tonnes of the year before.

#### COLOMBIA (4 August)

Modest to normal rains along the Caribbean coastal areas and abundant rains in the northwest continue to favour planting of the 2003/04 first season cereal crops. Sowing is about to be completed and enlarged plantings, particularly maize, with respect to 2002 average plantings are anticipated. The increase in maize plantings is largely due to the Government's incentive programme to producers to help reduce the country dependence on imports. Harvesting is about to start and slightly above-average maize and paddy outputs are expected. Production of sorghum should be about average.

Wheat imports in marketing year 2003 (January/December) should be about 1.2 million tonnes, while maize imports are expected to be between 2.1 million tonnes and 2.2 million tonnes.

Food assistance from the international community continues in various parts of the country to the internally displaced population, the victims of the civil strife which for long is affecting

#### ECUADOR (4 August)

**Harvesting of the 2003 first (main) season maize crop, mostly yellow, is advanced. The outlook is poor as the crops were affected by dry weather by the end of 2002 and subsequently by intense rains in February and March. Planting of the white maize crop, which accounts for some 25 per cent of total domestic maize production, is underway and some recovery is expected from last year's poor crop, but not enough to compensate for the poor outturn of the yellow maize crop. Overall, aggregate maize (white and yellow) production in 2003 is expected to be low for the third consecutive year.**

**Wheat imports in marketing year 2003/04 (July/June) are early forecast at about 470 000 tonnes to 480 000 tonnes, while maize imports in marketing year 2003 (January/December) are expected to remain at about the same 2002 level of 350 000 tonnes.**

#### PARAGUAY (4 August)

Normal weather has resumed and planting of the 2003 wheat crop, which had been disrupted because of severe dry weather, has been recently completed. Harvesting is about to start and an average output is tentatively forecast. Sowing of the 2003 maize crop has only started and intended plantings should be about average.

#### PERU (4 August)

Harvesting of the 2003 wheat crop, mostly grown in the highlands for direct local consumption, is at its peak and early forecasts indicate an output of some 190 000 tonnes, slightly above the level of 2002 and nearly 9 percent above the average of the past 5 years.

The bulk of the harvesting operations of the yellow maize crop are underway, while harvesting of white maize has been virtually completed. The outlook is good for both crops and an above-average output (white and yellow) of some 1.3 million tonnes is tentatively forecast. Paddy is harvested all year around and an average output of nearly 2.0 million tonnes is provisionally forecast.

Wheat imports in marketing year 2004 (January/December) are expected to increase slightly from the relatively high level of imports of 2003, reflecting the strong demand for this staple in the population's diet. Maize imports in 2004 (January/December) should be about 600 000 tonnes, close to the volume of imports of 2003.

#### URUGUAY (4 August)

Planting of the 2003/04 wheat and barley crops continues under generally dry weather. Official forecasts indicate that intended plantings of wheat should decrease from 2002/03 level and should be a below average 110 000 hectares to 115 000 hectares, considerably below the average of 156 000 hectares of the past 5 years. By contrast, the area planted to barley is expected to increase and some 116 000 hectares are anticipated, which compares to the past 5-year average of 89 000 hectares. Land is being prepared for planting of the paddy and maize crops from October.

#### VENEZUELA (4 August)

**Heavy rains in early June resulted in land and mudslides in the Andean states of Mérida and Barinas in the northwest. A number of victims and missing people are reported. Severe damage has been incurred to rural housing and infrastructure. A local state of emergency was declared and relief assistance provided by the authorities. Harvesting of the 2003 coarse grain crops is about to start. The outlook is poor mainly as a consequence of the lack of fertilizers and quality seeds caused by financial constraints to farmers, the result of the difficult economic situation being faced by the country. Planting of the irrigated paddy crop has been only completed. Prospects are uncertain as the crop was affected at planting by inadequate water availability.**

### EUROPE

#### EU (1 August)

Cereal output is forecast to fall in the EU this year following reduced plantings and lower yield prospects because of exceptionally hot and dry weather in several main producing areas. FAO's latest estimate of the EU's aggregate wheat crop now stands at about 94 million tonnes, 10 percent down from last year and 7 percent below the average of the past 5 years. The largest reduction at the national level has occurred in France where a significant area reduction compounded with a sharp yield decrease has seen production drop to just about 32.7 million tonnes, from almost 39 million tonnes in 2002. Among the other main wheat producers, output is forecast to decline by about 6 percent in Germany, 13 percent in Italy, 5 percent in Spain and 12 percent in the United Kingdom. Regarding the coarse grains, contrary to earlier expectations, the latest forecast for the EU's aggregate crop also points to a significant decline, by about 10 percent, to about 97 million tonnes. Barley crops are already gathered in many parts and lower yields have been noted, while the developing maize crops have been stressed by exceptionally hot and dry conditions in June and July. Prospects could still improve for some of the maize crops if rains arrive in the remainder of the growing season but a significant reduction from last year's relatively good crop is very likely.

#### ALBANIA (1 August)

Despite a promising start to the winter grain growing season with good moisture levels, dry conditions set in from March onwards stressing the winter plants and affecting spring sowings. Cereal production for the year will likely be down from last year and below normal. In the absence of significant carryover stocks the country will continue to rely on significant imports to meet its consumption requirements in 2003/04. WFP continues to assist vulnerable groups of food insecure people (totalling 63 000 persons) in the country, with a Protracted Relief and Rehabilitation project due to run through till December 2003.

**BELARUS (30 July)**

Cereal harvest is in progress and early estimates show that production at 5.1 million tonnes is slightly below last year's harvest of 5.3 million tonnes. This year's estimated harvest includes some 1.7 million tonnes of rye, 1.6 million tonnes of barley and 840 000 tonnes of wheat. Aggregate cereal utilization is estimated at just over 5.5 million tonnes. The estimated deficit is commercially procured mainly from the CIS countries, in particular Russia.

**BOSNIA-HERZEGOVINA (1 August)**

Cereal harvest has begun and yields are seen significantly low for wheat and maize following unusually cold winter and dry spring. Aggregate cereal harvest is now estimated at just over one million tonnes, which is about 290 000 tonnes down on last year's improved harvest. This total includes some 130 000 tonnes of wheat and about 800 000 tonnes of maize compared with 297 000 tonnes of wheat and 912 000 tonnes of maize in 2002. Aggregate cereal utilization is estimated at about 1.6 million tonnes. The estimated deficit of 510 000 tonnes is to be met by commercial imports and 100 000 tonnes in food aid.

**BULGARIA (1 August)**

**The latest official forecast, as of mid-July, pointed to an even smaller wheat output in 2003 than had earlier been expected, due to persisting dry weather in June, following an unfavourable winter. The 2003 wheat crop is now expected at just 2.3 million tonnes, about 36 percent down from the previous year. Similarly, the winter barley crop is also expected to be significantly reduced to about 450 000 tonnes, less than half of the 2002 level. The country's normal export surplus of wheat will not be available this year so in the event of any significant exports, release of Government stocks or importations will be necessary to maintain normal consumption levels.**

**CROATIA (1 August)**

Prospects are for a decreased cereal harvest this year in view of an unusually cold winter and dry spring, which have affected the whole region. Aggregate cereal harvest is now estimated at about 2.7 million tonnes, which is almost 977 000 tonnes down on 2002/03 marketing year harvest. This aggregate includes 600 000 tonnes of wheat and 2 million tonnes of maize, compared with 988 000 tonnes of wheat and 2.5 million tonnes of maize last year. Annual cereal requirement is estimated at about 3.2 million tonnes. The deficit will be covered through commercial imports and draw down on stocks from last year's good harvest.

**CZECH REPUBLIC (1 August)**

**The first official estimate of the 2003 cereal harvest (excluding maize), stands at 5.3 million tonnes, which is 13 percent down from 2002 and if confirmed around this level, would be the lowest production on record in recent history. The reduction is due to smaller plantings, harsh winter conditions, which led to some crops being abandoned completely and drought in June, which affected yields. Although the normal domestic grain surplus will not exist this year, supplies are reported to be sufficient for domestic needs if no significant exports are made. As of late-July, the Government was reported to be considering market intervention to counter the risk of large exports as domestic wheat prices remain much lower than in many neighbouring countries where supplies are also expected to be tight this year.**

**ESTONIA (1 August)**

Cereal harvest has begun and latest estimates put aggregate harvest at about 525 000 tonnes, which is slightly below last year's harvest. This aggregate includes some 150 000 tonnes of wheat and 375 000 tonnes of coarse grains, mainly barley. Aggregate cereal import requirement for the

ensuing marketing year is estimated at 211 000 tonnes, including 121 000 tonnes of wheat and 90 000 tonnes of coarse grains.

#### **HUNGARY (1 August)**

The 2003 winter grain crop (mostly wheat) has been hit hard by severe drought since the spring and high summer temperatures. After early expectations for a plus-4 million tonne output when crops came out of winter dormancy in good condition, latest estimates, now that the harvest is almost complete, put the production at just about 3 million tonnes. This compares to 3.9 million tonnes last year and over 5 million tonnes in 2001. Although exports of the new wheat crop are expected to be very limited, relatively high carryover stocks from the previous year are reported. The summer maize crop is also suffering from the lack of moisture, and even if significant rains were to arrive in August, yields are likely to be well below average.

#### **LATVIA (1 August)**

Cereal harvest has begun in most of the country and latest estimates point to a slightly reduced cereal harvest this year, 980 000 tonnes, compared with just over one million tonnes in 2002. Harsh weather conditions in winter compromised some crop areas. Aggregate cereal utilization is estimated at 1.3 million tonnes and import requirement is estimated at 131 000 tonnes for the 2003/04 marketing year.

#### **LITHUANIA (1 August)**

Aggregate cereal harvest, which is in progress, is estimated at 2.3 million tonnes this year, which is some 200 000 tonnes below the harvest in 2002. Unfavourable weather conditions in winter compromised some of the winter crops this year. This year's aggregate cereal harvest includes some 790 000 tonnes of wheat, 970 000 tonnes of barley and 420 000 tonnes of rye. Cereal exports during the 2003/04 marketing year are estimated at 118 000 tonnes, while imports are estimated at 104 000 tonnes.

#### **MOLDOVA (31 July)**

**A severely cold winter and an exceptionally dry spring have compromised more than three-quarters of autumn and spring grains, wheat in particular. Wheat is the most important staple and covers about 90 percent of the autumn cereal area. Last autumn some 343 000 hectares were planted with wheat and about 71 000 hectares with barley. Latest estimates show that nearly 40 percent of the planted wheat area and almost all of barley was decimated. Yields on the remaining wheat area are estimated at less than one tonne per hectare compared with an average yield of over 3 tonnes per hectare in the past few years. FAO staff who visited Moldova between 7 and 12 July 2003 estimate wheat harvest at about 220 000 tonnes and barley at 48 000 tonnes (mainly spring), compared with 1.18 million tonnes of wheat and 256 000 tonnes of barley in 2002. Losses of winter cereals have been compared to those of 1945, the worst harvest in living memory. Maize harvest is estimated at about 967 000 tonnes compared with almost 1.2 million tonnes last year.**

Moldova exported a record 395 000 tonnes of cereals during 2002/03 marketing year including some 277 000 tonnes of wheat and 63 000 tonnes of maize, when international prices were significantly low. Cereal utilization is estimated at more than 1.9 million tonnes. The shortfall this year will be commercially procured, in particular, 400 000 tonnes of wheat is to be procured from Russia under a bilateral trade agreement. Access to food will be a serious issue for the most vulnerable population, in particular the pensioners, women-headed households and families with large number of dependents. Seed deficit, mainly wheat and barley is estimated at about 30 000 tonnes. FAO is planning, on an emergency basis, to assist the country in procuring some of the wheat seed requirements.

#### POLAND (1 August)

As in several other parts of the region, Poland's 2003 cereal crops have suffered from a harsh winter and summer drought. The first official estimate, released at the end of July, puts the aggregate small grain output (all grains excluding maize) in 2003 at about 22 million tonnes, compared to 24.6 million tonnes last year. Maize output is expected to remain similar to last year's level at about 2 million tonnes. Despite the likelihood of lower average yields, maize plantings are estimated to have increased. However, some good rains will still be needed during the remainder of the maize growing season for the current forecast to materialize.

#### ROMANIA (1 August)

**Romania is one of the central and eastern European countries hardest hit by this summer's drought in the region. The wheat harvest was virtually complete as of the end of July and latest estimates point to a dramatically reduced crop of about 2.5 million tonnes, almost 2 million tonnes less than the relatively small crop also last year. After being a net wheat exporter in the past two years, significant wheat imports are expected to be necessary in 2003/04, as seed for the winter sowing season this autumn and for food consumption. The Government announced in late July that import taxes will be removed for imports of cereals totalling 1.6 million tonnes, including 1 million tonnes of wheat. Furthermore, wheat exports have been banned for one year. Prospects for the summer maize crop are still uncertain. The planted area is estimated to have increased, but crops have also been stressed by the extremely hot and dry conditions. Unless some good rains come for the remainder of the growing season maize yields can be expected to be significantly below normal.**

#### RUSSIAN FEDERATION (30 July)

Grain harvesting has begun but at a slower pace than last year amid late spring and unfavourable weather conditions in most of the country. Latest estimates indicate that aggregate grain harvest this year will not be more than 71 million tonnes compared with 86.6 million tonnes last year. Aggregate wheat harvest is seen to amount to about 36.5 million tonnes, which is some 28 percent lower than the harvest in 2002. Barley harvest, seen at 17.7 million tonnes, is about one million tonnes lower than last year's harvest. Thin snow cover, frost and late spring compromised cereal harvest this year. In addition, low cereal prices discouraged farmers to match areas planted with cereals last year, while winter kill is now estimated at almost 4 million hectares.

Aggregate cereal exports during the 2003/04 marketing year is forecast at 4.4 million tonnes, including 2.2 million tonnes of wheat and just over 2 million tonnes of barley. Aggregate cereal export during 2002/03 marketing year amounted to almost 18.3 million tonnes, including 14.6 million tonnes of wheat and 3.5 million tonnes of barley.

**Targeted food aid continues to be necessary for the internally displaced and vulnerable population in Chechnya, in view of the ongoing civil strife and military operations. WFP has begun distributing an estimated 34 011 tonnes of basic food commodities to some 290 500 internally displaced and vulnerable population in Chechnya and Ingushetia.**

#### SERBIA AND MONTENEGRO (1 August)

Cereal harvest tentatively estimated at about 6.9 million tonnes this year is almost 1.7 million tonnes down on the 2002/03 marketing year harvest. This year's aggregate cereal harvest includes some 1.40 million tonnes of wheat and 5.0 million tonnes of maize, which compares with 2.24 million tonnes of wheat and 5.5 million tonnes of maize. Unusually cold weather and dry spring compromised much of the cereal and other industrial crops. Maize estimates are very tentative and much depends on weather conditions during summer. The Government has recently banned all exports of wheat and maize. Import requirement for the 2003/04 marketing year is estimated at 500 000 tonnes of wheat and 60 000 tonnes of rice and maize.

The internally displaced and vulnerable populations continue to require food and other assistance. Under the current Protracted Relief and Recovery Operation, which began in July 2002, WFP is currently assisting some 96 844 refugees in Serbia and Montenegro, while ICRC is assisting some 59 000 internally displaced persons (IDP).

#### **SLOVAK REPUBLIC (1 August)**

As of late July, harvesting of the grain crop (all cereals except maize) was reported to be about 70 percent complete. Based on the performance so far, the aggregate output of cereals in 2003 is expected to be 2.7 million tonnes, some 15 percent down from last year and 9 percent below the average of the past 5 years.

#### **THE FORMER YUGOSLAV REPUBLIC OF MACEDONIA (1 August)**

Official reports indicate that the 2003 wheat production fell below normal because of delayed planting last autumn and unfavourable spring weather conditions. Although the final post harvest results are not yet known, the latest pre-harvest forecast pointed to a crop of just about 220 000 tonnes, well below last year's estimated crop of 295 000 tonnes. It is reported that the State Commodity Reserves Directorate will not import wheat in 2003 as it holds ample stocks carried over from the previous season. However, the Government may grant duty-free imports of 150 000 tonnes of wheat in 2003.

#### **UKRAINE (30 July)**

Cereal harvest has begun and the prospects are now for a much reduced crop than previously estimated. Aggregate cereal harvest this year is estimated at 20.3 million tonnes, which is more than 15.7 million tonnes lower than the harvest in 2002. This year's harvest includes some 5.5 million tonnes of wheat, 7.0 million tonnes of barley and just over 5.2 million tonnes of maize. The main causes of such significant crop damages this year were severely cold temperatures, thin snow cover, frost and an unusually dry and late spring. Ukraine requires some 23.1 million tonnes of cereals to cover domestic requirements, including 10.3 million tonnes of wheat, 6.3 million tonnes of barley and 3.7 million tonnes of maize.

The aggregate cereal export during the 2003/04 marketing year is forecast at about 1.36 million tonnes compared with 10.5 million tonnes last year. Cereal exports this year include some 500 000 tonnes of barley and 800 000 tonnes of maize. The cereal import requirement for the 2003/04 marketing year is estimated at 2.4 million tonnes, including 2.3 million tonnes of good quality wheat and 70 000 tonnes of rye. In contrast, cereal imports, mainly good quality wheat, totalled 666 000 tonnes during the 2002/03 marketing year.

### **NORTH AMERICA**

#### **CANADA (25 August)**

Latest indications continue point to a strong recovery in cereal production this year after last year's drought-reduced crop. Based on Statistics Canada's June area seeded estimates, the country's aggregate cereal crop in 2003 was forecast in August at about 47 million tonnes, compared to just 35.5 million tonnes in 2002. The August forecast was trimmed back somewhat compared to that of a month earlier after yield prospects declined due to lack of precipitation and above-normal temperatures. Nevertheless, soil moisture reserves are on the whole reported to be much better throughout western Canada pointing to a recovery in yields and lower abandonment rates than in the previous year. The latest forecast put output of wheat at just about 22 million tonnes, some 38

percent up from 2002, while that of barley, the main coarse grain, is seen to recover by 68 percent to almost 12 million tonnes.

#### UNITED STATES (25 August)

The 2003 winter wheat harvest was virtually complete by the end of July. The USDA Crop Report estimates a total of winter wheat output was 46.7 million tonnes, 50 percent up from the poor crop of 2002. The spring wheat crop is also expected to increase significantly. Although the area planted decreased, abandonment is expected to be much less and yields are forecast to be well up on last year. The aggregate (winter and spring) wheat output is forecast at 62.4 million tonnes, 42 percent up from 2002. The 2003 coarse grain output is also forecast to rebound from last year's drought-reduced level to about 276 million tonnes, 12.5 percent up from the previous year. Of the total, maize is forecast to account for 256 million tonnes. The 2003 paddy area, estimated at 1.2 million hectares, is reported to be the lowest since 1996/97 and production is expected to fall to around 9 million tonnes.

### **OCEANIA**

#### AUSTRALIA (31 July)

Planting of the 2003 winter wheat and coarse grain crops was virtually complete by mid-July. Some favourable rains early in the month prompted a spurt of late planting activity in some parts, to make use of areas still unplanted because of dry conditions in June. The final area could be close to that forecast by ABARE in early June, which pointed to a 6.8 percent increase in the winter crop area to just over 19 million hectares. Thus, although much will still depend on the weather conditions during the growing season, the latest cereal output prospects remain in line with the official June forecasts. Wheat output in 2003 is expected to recover sharply to about 21.7 million tonnes, with average yields returning to around 1.8 tonnes per hectare after the previous year's poor level of just 0.8 tonnes per hectare. The winter coarse grain output is also seen to rebound sharply, with barley production forecast at about 6.6 million tonnes compared to 3.3 million tonnes in 2002. The harvest of the 2003 summer crops is mostly complete. Production was sharply reduced because of reduced irrigation supplies on account of last year's drought. Output of sorghum and maize was less than half the previous year's level at just about 1.2 million tonnes, while the paddy crop was down 70 percent at a near-record low of just 391 000 tonnes.

#### NEW CALEDONIA (4 August)

Heavy rains and strong winds, resulting in flooding and mudslides, have affected the main island of Grand Terre of New Caledonia in mid-July. The areas most severely hit by the adverse weather are located in the north and the north-east. Damage has been incurred to village housing and infrastructure. Food crops (potatoes and pumpkins) have been affected by the floods.

#### SAMOA (4 August)

Coconut production, a main foreign exchange earner for the country, is being threatened by the "rhinoceros beetle," a devastating pest which has been attacking coconut plantations in various South Pacific islands (i.e., Fiji, Papua New Guinea, Tokelau, Tonga, Tuvalu and Wallis and Futuna). Measures such as viral and fungal bio-control agents to clear the land of possible breeding sites are being taken by the authorities to protect the island's 2 000 farmers' coconut plantations.

ESTIMATED CEREAL IMPORT REQUIREMENTS OF LOW-INCOME FOOD-DEFICIT COUNTRIES 1/  
a) 2002/03 or 2003 estimates (in thousand tonnes)

COUNTRY	Marketing year	2001/02 or 2002			2002/03 or 2003			
		Actual imports			Total import requirements (excluding re-exports)	Import position		
		Commercial purchases	Food aid	Total commercial and aid		Total commercial and aid	Food aid allocated committed or shipped	Commercial purchases
<b>AFRICA</b>		<b>32 724.2</b>	<b>1 912.9</b>	<b>34 637.1</b>	<b>34 953.9</b>	<b>24 368.6</b>	<b>2 239.2</b>	<b>22 129.4</b>
<b>Northern Africa</b>		<b>16 830.8</b>	<b>42.8</b>	<b>16 873.6</b>	<b>15 986.0</b>	<b>16 031.2</b>	<b>268.5</b>	<b>15 762.7</b>
Egypt	July/June	12 238.5	34.3	12 272.8	11 820.0	11 862.4	264.1	11 598.3
Morocco	July/June	4 592.3	8.5	4 600.8	4 166.0	4 168.8	4.4	4 164.4
<b>Eastern Africa</b>		<b>3 608.7</b>	<b>894.7</b>	<b>4 503.4</b>	<b>5 285.0</b>	<b>2 266.5</b>	<b>953.6</b>	<b>1 312.9</b>
Burundi	Jan./Dec.	42.6	22.4	65.0	70.0	43.8	43.8	0.0
Comoros	Jan./Dec.	46.0	0.0	46.0	46.0	8.5	0.0	8.5
Djibouti	Jan./Dec.	58.2	19.7	77.9	63.0	10.7	4.7	6.0
Eritrea	Jan./Dec.	67.9	159.5	227.4	440.0	42.9	42.9	0.0
Ethiopia	Jan./Dec.	144.3	245.7	390.0	745.0	533.5	524.7	8.8
Kenya	Oct./Sept.	1 162.8	123.6	1 286.4	1 640.0	551.6	104.0	447.6
Rwanda	Jan./Dec.	181.5	44.5	226.0	226.0	26.2	13.8	12.4
Somalia	Aug./July	244.6	25.4	270.0	320.0	320.0	7.3	312.7
Sudan	Nov./Oct.	1 147.8	80.9	1 228.7	1 120.0	239.4	98.0	141.4
Tanzania	June/May	382.3	117.7	500.0	470.0	410.0	41.6	368.4
Uganda	Jan./Dec.	130.7	55.3	186.0	145.0	79.9	72.8	7.1
<b>Southern Africa</b>		<b>1 913.0</b>	<b>422.0</b>	<b>2 335.0</b>	<b>3 237.0</b>	<b>3 251.8</b>	<b>780.7</b>	<b>2 471.1</b>
Angola	April/March	395.5	175.9	571.4	725.0	790.5	223.9	566.6
Lesotho	April/March	178.2	2.8	181.0	338.0	234.0	42.0	192.0
Madagascar	April/March	364.4	29.3	393.7	255.0	264.4	46.1	218.3
Malawi	April/March	144.3	12.6	156.9	550.0	672.8	222.5	450.3
Mozambique	April/March	507.8	176.2	684.0	642.0	750.2	94.7	655.5
Swaziland	May/April	76.8	1.2	78.0	111.0	104.9	12.8	92.1
Zambia	May/April	246.0	24.0	270.0	616.0	435.0	138.7	296.3
<b>Western Africa</b>		<b>9 590.3</b>	<b>459.2</b>	<b>10 049.5</b>	<b>9 553.4</b>	<b>2 716.0</b>	<b>209.5</b>	<b>2 506.5</b>
<b>Coastal Countries</b>		<b>6 949.5</b>	<b>265.2</b>	<b>7 214.7</b>	<b>6 925.0</b>	<b>1 963.9</b>	<b>84.1</b>	<b>1 879.8</b>
Benin	Jan./Dec.	96.2	18.8	115.0	115.0	71.1	8.2	62.9
Côte d'Ivoire	Jan./Dec.	1 302.8	14.2	1 317.0	1 177.0	727.5	0.9	726.6
Ghana	Jan./Dec.	462.2	79.9	542.1	520.0	269.9	35.6	234.3
Guinea	Jan./Dec.	331.7	37.1	368.8	370.0	10.8	9.3	1.5
Liberia	Jan./Dec.	116.5	33.5	150.0	165.0	24.4	17.5	6.9
Nigeria	Jan./Dec.	4 297.5	12.5	4 310.0	4 170.0	805.5	0.0	805.5
Sierra Leone	Jan./Dec.	242.6	69.2	311.8	308.0	21.0	12.6	8.4
Togo	Jan./Dec.	100.0	0.0	100.0	100.0	33.7	0.0	33.7
<b>Sahelian Countries</b>		<b>2 640.8</b>	<b>194.0</b>	<b>2 834.8</b>	<b>2 628.4</b>	<b>752.1</b>	<b>125.4</b>	<b>626.7</b>
Burkina faso	Nov./Oct.	227.2	32.2	259.4	236.5	15.0	13.4	1.6
Cape Verde	Nov./Oct.	37.4	36.2	73.6	108.5	48.5	39.7	8.8
Chad	Nov./Oct.	84.1	6.4	90.5	98.1	12.7	8.8	3.9
Gambia	Nov./Oct.	143.2	5.7	148.9	142.3	8.7	2.2	6.5
Guinea Bissau	Nov./Oct.	49.3	7.0	56.3	73.5	35.8	8.4	27.4
Mali	Nov./Oct.	237.2	9.2	246.4	279.0	10.0	6.9	3.1
Mauritania	Nov./Oct.	261.6	45.2	306.8	308.0	65.7	18.3	47.4
Niger	Nov./Oct.	356.2	34.7	390.9	377.0	56.7	2.2	54.5
Senegal	Nov./Oct.	1 244.6	17.4	1 262.0	1 005.5	499.0	25.5	473.5
<b>Central Africa</b>		<b>781.4</b>	<b>94.2</b>	<b>875.6</b>	<b>892.5</b>	<b>103.1</b>	<b>26.9</b>	<b>76.2</b>
Cameroon	Jan./Dec.	365.2	2.2	367.4	367.5	43.1	0.0	43.1
Cent.Afr.Rep.	Jan./Dec.	32.5	4.5	37.0	38.0	2.6	1.1	1.5
Congo, Dem.Rep.	Jan./Dec.	184.4	68.6	253.0	270.0	23.0	23.3	0.0
Congo, Rep.	Jan./Dec.	177.7	13.5	191.2	190.0	33.4	2.0	31.4
Eq. Guinea	Jan./Dec.	15.0	0.0	15.0	15.0	0.2	0.0	0.2
Sao Tome	Jan./Dec.	6.6	5.4	12.0	12.0	0.5	0.5	0.0

ESTIMATED CEREAL IMPORT REQUIREMENTS OF LOW-INCOME FOOD-DEFICIT COUNTRIES 1/  
a) 2002/03 or 2003 estimates (in thousand tonnes)

COUNTRY	Marketing year	2001/02 or 2002			2002/03 or 2003			
		Actual imports			Total import requirements (excluding re-exports)	Import position		
		Commercial purchases	Food aid	Total commercial and aid		Total commercial and aid	Food aid allocated committed or shipped	Commercial purchases
<b>ASIA</b>		<b>32 298.8</b>	<b>3 769.0</b>	<b>36 067.8</b>	<b>37 316.0</b>	<b>34 182.4</b>	<b>2 191.9</b>	<b>31 990.5</b>
Afghanistan	July/June	1 168.9	336.9	1 505.8	1 396.0	762.1	341.2	420.9
Armenia	July/June	184.0	39.0	223.0	299.0	152.0	29.0	123.0
Azerbaijan	July/June	716.0	16.0	732.0	597.0	710.0	24.8	685.2
Bangladesh	July/June	1 621.2	534.5	2 155.7	2 179.0	2 778.7	358.3	2 420.4
Bhutan	July/June	50.8	3.2	54.0	71.0	71.0	3.1	67.9
Cambodia	Jan./Dec.	66.6	51.5	118.1	105.0	0.0	0.0	0.0
China 2/	July/June	9 929.4	70.6	10 000.0	9 600.0	9 600.0	85.0	9 515.0
Georgia	July/June	443.0	100.0	543.0	505.0	494.0	18.0	476.0
India	April/March	11.5	216.1	227.6	380.0	380.0	165.4	214.6
Indonesia	April/March	6 510.8	223.0	6 733.8	8 802.0	9 164.0	218.7	8 945.3
Korea, D.P.R.	Nov./Oct.	489.5	1 104.9	1 594.4	1 359.0	866.7	520.4	346.3
Kyrgyz Republic	July/June	196.0	89.0	285.0	161.0	128.0	7.0	121.0
Laos	Jan./Dec.	24.2	23.8	48.0	37.0	0.3	0.3	0.0
Maldives	Jan./Dec.	38.0	0.0	38.0	38.0	15.9	14.6	1.3
Mongolia	Oct./Sept.	197.8	59.5	257.3	238.0	117.8	0.0	117.8
Nepal	July/June	99.0	6.0	105.0	100.0	100.0	0.7	99.3
Pakistan	May/April	204.3	178.7	383.0	380.0	380.0	52.5	327.5
Philippines	July/June	4 533.5	249.5	4 783.0	4 900.0	4 900.0	68.2	4 831.8
Sri Lanka	Jan./Dec.	979.5	83.5	1 063.0	1 040.0	291.3	8.5	282.8
Syria	July/June	1 434.4	12.7	1 447.1	1 830.0	1 859.6	6.6	1 853.0
Tajikistan	July/June	440.0	202.0	642.0	486.0	577.0	139.0	438.0
Turkmenistan	July/June	46.0	8.0	54.0	58.0	60.0	0.0	60.0
Uzbekistan	July/June	525.0	48.0	573.0	320.0	374.0	118.0	256.0
Yemen	Jan./Dec.	2 389.4	112.6	2 502.0	2 435.0	400.0	12.6	387.4
<b>CENTRAL AMERICA</b>		<b>3 962.8</b>	<b>337.5</b>	<b>4 300.3</b>	<b>4 472.0</b>	<b>4 587.7</b>	<b>300.5</b>	<b>4 287.2</b>
Cuba	July/June	1 711.4	25.4	1 736.8	1 775.0	1 775.0	1.2	1 773.8
Guatemala	July/June	1 010.9	126.6	1 137.5	1 180.0	1 180.7	119.7	1 061.0
Haiti	July/June	456.8	94.0	550.8	615.0	648.8	97.8	551.0
Honduras	July/June	543.3	33.3	576.6	625.0	647.0	25.7	621.3
Nicaragua	July/June	240.4	58.2	298.6	277.0	336.2	56.1	280.1
<b>SOUTH AMERICA</b>		<b>927.1</b>	<b>141.3</b>	<b>1 068.4</b>	<b>1 129.0</b>	<b>1 129.0</b>	<b>120.5</b>	<b>1 008.5</b>
Bolivia	July/June	200.2	71.9	272.1	269.0	269.0	45.6	223.4
Ecuador	July/June	726.9	69.4	796.3	860.0	860.0	74.9	785.1
<b>OCEANIA</b>		<b>418.0</b>	<b>0.0</b>	<b>418.0</b>	<b>399.0</b>	<b>27.2</b>	<b>0.0</b>	<b>27.2</b>
Kiribati	Jan./Dec.	8.0	0.0	8.0	8.0	0.0	0.0	0.0
Papua New Guinea	Jan./Dec.	355.0	0.0	355.0	336.0	27.2	0.0	27.2
Samoa	Jan./Dec.	17.0	0.0	17.0	17.0	0.0	0.0	0.0
Solomon Isl.	Jan./Dec.	26.0	0.0	26.0	26.0	0.0	0.0	0.0
Tuvalu	Jan./Dec.	1.0	0.0	1.0	1.0	0.0	0.0	0.0
Vanuatu	Jan./Dec.	11.0	0.0	11.0	11.0	0.0	0.0	0.0
<b>EUROPE</b>		<b>940.0</b>	<b>144.8</b>	<b>1 084.8</b>	<b>1 040.0</b>	<b>1 040.0</b>	<b>81.6</b>	<b>958.4</b>
Albania	July/June	308.5	39.3	347.8	383.0	383.0	27.2	355.8
Bosnia&Herzegovina	July/June	375.4	104.6	480.0	400.0	400.0	54.4	345.6
Macedonia, FYR	July/June	256.1	0.9	257.0	257.0	257.0	0.0	257.0
<b>TOTAL</b>		<b>71 270.9</b>	<b>6 305.5</b>	<b>77 576.4</b>	<b>79 309.9</b>	<b>65 334.9</b>	<b>4 933.7</b>	<b>60 401.2</b>

SOURCE: FAO

1/ Includes food deficit countries with per caput income below the level used by the World Bank to determine eligibility for IDA assistance (i.e. U.S.\$ 1 445 in 2000), which is in accordance with the guidelines and criteria agreed to by the CFA should be given priority in the allocation of food aid. 2/ Includes import requirements of Taiwan Province.

ESTIMATED CEREAL IMPORT REQUIREMENTS OF LOW-INCOME FOOD-DEFICIT COUNTRIES 1/  
b) 2003/04 estimates (in thousand tonnes)

COUNTRY	Marketing year	2002/03			2003/04			
		Actual imports			Total import requirements (excluding re-exports)	Import position		
		Commercial purchases	Food aid	Total commercial and aid		Total commercial and aid	Food aid allocated committed or shipped	Commercial purchases
<b>AFRICA</b>		<b>18 914.9</b>	<b>1 098.1</b>	<b>20 013.0</b>	<b>17 308.0</b>	<b>603.6</b>	<b>438.0</b>	<b>165.6</b>
<b>Northern Africa</b>		<b>15 762.7</b>	<b>268.5</b>	<b>16 031.2</b>	<b>14 153.0</b>	<b>180.6</b>	<b>180.6</b>	<b>0.0</b>
Egypt	July/June	11 598.3	264.1	11 862.4	11 900.0	180.6	180.6	0.0
Morocco	July/June	4 164.4	4.4	4 168.8	2 253.0	0.0	0.0	0.0
<b>Eastern Africa</b>		<b>681.1</b>	<b>48.9</b>	<b>730.0</b>	<b>740.0</b>	<b>21.9</b>	<b>21.9</b>	<b>0.0</b>
Somalia	Aug./July	312.7	7.3	320.0	310.0	0.0	0.0	0.0
Tanzania	June/May	368.4	41.6	410.0	430.0	21.9	21.9	0.0
<b>Southern Africa</b>		<b>2 471.1</b>	<b>780.7</b>	<b>3 251.8</b>	<b>2 415.0</b>	<b>401.1</b>	<b>235.5</b>	<b>165.6</b>
Angola	April/March	566.6	223.9	790.5	709.0	56.4	46.0	10.4
Lesotho	April/March	192.0	42.0	234.0	321.0	36.1	12.0	24.1
Madagascar	April/March	218.3	46.1	264.4	383.0	66.9	33.3	33.6
Malawi	April/March	450.3	222.5	672.8	64.0	3.0	3.0	0.0
Mozambique	April/March	655.5	94.7	750.2	744.0	206.1	131.9	74.2
Swaziland	May/April	92.1	12.8	104.9	128.0	18.8	9.3	9.5
Zambia	May/April	296.3	138.7	435.0	66.0	13.8	0.0	13.8
<b>ASIA</b>		<b>30 854.9</b>	<b>1 635.5</b>	<b>32 490.4</b>	<b>41 916.0</b>	<b>1 069.5</b>	<b>337.7</b>	<b>731.8</b>
Afghanistan	July/June	420.9	341.2	762.1	392.0	5.5	5.5	0.0
Armenia	July/June	123.0	29.0	152.0	211.0	20.5	20.5	0.0
Azerbaijan	July/June	685.2	24.8	710.0	644.0	0.0	0.0	0.0
Bangladesh	July/June	2 420.4	358.3	2 778.7	2 325.0	0.0	0.0	0.0
Bhutan	July/June	67.9	3.1	71.0	59.0	0.0	0.0	0.0
China 2/	July/June	9 515.0	85.0	9 600.0	19 840.0	21.8	21.8	0.0
Georgia	July/June	476.0	18.0	494.0	580.0	0.0	0.0	0.0
India	April/March	214.6	165.4	380.0	300.0	210.5	210.5	0.0
Indonesia	April/March	8 945.3	218.7	9 164.0	8 840.0	781.8	50.0	731.8
Kyrgyz Republic	July/June	121.0	7.0	128.0	187.0	0.0	0.0	0.0
Nepal	July/June	99.3	0.7	100.0	100.0	0.0	0.0	0.0
Pakistan	May/April	327.5	52.5	380.0	2 000.0	0.1	0.1	0.0
Philippines	July/June	4 831.8	68.2	4 900.0	4 600.0	19.6	19.6	0.0
Syria	July/June	1 853.0	6.6	1 859.6	950.0	0.0	0.0	0.0
Tajikistan	July/June	438.0	139.0	577.0	456.0	9.7	9.7	0.0
Turkmenistan	July/June	60.0	0.0	60.0	58.0	0.0	0.0	0.0
Uzbekistan	July/June	256.0	118.0	374.0	374.0	0.0	0.0	0.0
<b>CENTRAL AMERICA</b>		<b>4 287.2</b>	<b>300.5</b>	<b>4 587.7</b>	<b>4 530.0</b>	<b>80.3</b>	<b>80.3</b>	<b>0.0</b>
Cuba	July/June	1 773.8	1.2	1 775.0	1 830.0	0.0	0.0	0.0
Guatemala	July/June	1 061.0	119.7	1 180.7	1 210.0	35.5	35.5	0.0
Haiti	July/June	551.0	97.8	648.8	590.0	7.4	7.4	0.0
Honduras	July/June	621.3	25.7	647.0	650.0	12.6	12.6	0.0
Nicaragua	July/June	280.1	56.1	336.2	250.0	24.8	24.8	0.0
<b>SOUTH AMERICA</b>		<b>1 008.5</b>	<b>120.5</b>	<b>1 129.0</b>	<b>1 144.0</b>	<b>73.7</b>	<b>73.7</b>	<b>0.0</b>
Bolivia	July/June	223.4	45.6	269.0	269.0	73.7	73.7	0.0
Ecuador	July/June	785.1	74.9	860.0	875.0	0.0	0.0	0.0
<b>EUROPE</b>		<b>958.4</b>	<b>81.6</b>	<b>1 040.0</b>	<b>1 151.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>
Albania	July/June	355.8	27.2	383.0	384.0	0.0	0.0	0.0
Bosnia&Herzegovina	July/June	345.6	54.4	400.0	510.0	0.0	0.0	0.0
Macedonia, FYR	July/June	257.0	0.0	257.0	257.0	0.0	0.0	0.0
<b>TOTAL</b>		<b>56 023.9</b>	<b>3 236.2</b>	<b>59 260.1</b>	<b>66 049.0</b>	<b>1 827.1</b>	<b>929.7</b>	<b>897.4</b>

SOURCE: FAO

for footnotes, see previous page.

## CONTENTS

	Page
Affected Countries .....	2
Crop and Food Supply Situation .....	3
Country Reports .....	6
Northern Africa .....	6
Western Africa .....	7
Central Africa .....	12
Eastern Africa .....	13
Southern Africa .....	17
Asia .....	19
Central America .....	28
South America .....	31
Europe .....	33
North America .....	37
Oceania .....	38
Summary Tables:	
a) Estimates for 2002/2003 or 2003 .....	39
b) Estimates for 2003/04 .....	41

### DEFINITIONS:

**"Unfavourable Prospects for Current Crops"**: Refer to prospects of a shortfall in production of current crops as a result of a reduction of the area planted and/or adverse weather conditions, plant pests, diseases and other calamities which indicate a need for close monitoring of the crops for the remainder of the growing season.

**"Shortfalls in Food Supplies in Current Marketing Year Requiring Exceptional External Assistance"**: Refer to an exceptional shortfall in aggregate supplies or a localized deficit as a result of crop failures, natural disasters, interruption of imports, disruption of distribution, excessive post-harvest losses, other supply bottlenecks and/or an increased demand for food arising from population movements within the country or an influx of refugees. In the case of an exceptional shortfall in aggregate food supplies, exceptional and/or emergency food aid may be required to cover all or part of the deficit.

**"Purchase and Distribution of Localized or Exportable Surpluses Requiring External Assistance"**: Refers to a situation of an exceptional surplus existing in a particular area of a country which needs to be transported to deficit areas in the same country or the neighbouring countries for which purpose external assistance is required.

**NOTE**: This report is prepared on the responsibility of the FAO Secretariat with information from official and unofficial sources. Since conditions can change rapidly and information may not always represent the current crop or food supply situation as of present date, further enquiries should be made before any action is taken. None of the reports should be regarded in any way as statements of governmental views.

Enquiries may be directed to Henri Josserand, Chief, Global Information and Early Warning Service, Commodities and Trade Division, (ESC), FAO, Rome (Direct Facsimile: 0039-06-5705-4495, E-mail INTERNET: GIEWS1@FAO.ORG).

Please note that this report is also available on the Internet as part of the FAO World Wide Web ([www.fao.org](http://www.fao.org)) at the following URL address: <http://www.fao.org/giews/>.

The designations employed and the presentation of material in this bulletin do not imply the expression of any opinion whatsoever on the part of the Food and Agriculture Organization of the United Nations concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries.