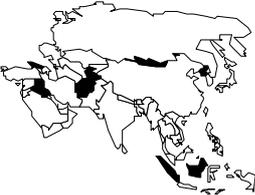


# FOODCROPS AND SHORTAGES

No. 4

October 2003

	<p><b>AFRICA:</b> In eastern Africa, despite heavy rains and floods in recent months, the overall outlook for the imminent harvest is favourable in most countries. However, the food situation is still of concern in Eritrea, Ethiopia, Tanzania and parts of northern Somalia. In southern Africa, more food aid pledges are needed for the Regional Emergency Operation to avoid discontinuity in the pipeline during the hunger period that will begin as of January. In the DR Congo, agricultural activities are continuously disrupted by the persistent civil conflict. In Liberia, the overall food situation remains critical, notwithstanding an improved security situation in Monrovia.</p>
	<p><b>ASIA:</b> In Iraq, despite a good crop this year, the effects of war, sanctions and recent drought have seriously eroded the asset base of the population and left most of the population relying on food rations for their daily subsistence. Except for Georgia and Armenia, cereal harvests in most of the Asian CIS countries are now estimated at above average, although still lower than the bumper harvests of last year. In Afghanistan, a record cereal harvest is envisaged, but access to food remains difficult for a significant number of households. In DPR Korea, prospects for the rice and maize crops are improved as a result of generally good weather conditions.</p>
	<p><b>LATIN AMERICA AND THE CARIBBEAN:</b> In Central America and the Caribbean, food assistance continues to be provided to families in El Salvador, Guatemala, Honduras and Nicaragua who have suffered from natural disasters and economic shocks in recent years. In South America, the maize crop in Ecuador was poor for the third consecutive year, mostly as a result of adverse weather. In Venezuela, poor harvests are anticipated in 2003: financial constraints on farmers have resulted in limited or non-existent agricultural inputs.</p>
	<p><b>EUROPE:</b> Cereal production in Europe has been considerably reduced this year by adverse weather. Aggregate cereal output in the EU has fallen by about 12 percent from last year; among the CEECs, sharply reduced cereal outputs are expected from virtually all countries. Following adverse weather conditions in winter and spring, cereal harvests throughout the European CIS were also significantly lower. Ukraine will require significant imports to meet domestic requirements, and the Russian Federation will not be a significant player in the international grain market.</p>
	<p><b>NORTH AMERICA:</b> In the United States, the 2003 wheat crop rose sharply from last year's low to 62.4 million tonnes, and the aggregate coarse grain output is also forecast to rebound from last year's drought-reduced level. In Canada, hot and dry conditions during July and early August have diminished prospects for the main 2003 cereal crops, but the production level is still expected to be well above last year's, which was seriously affected by drought.</p>
	<p><b>OCEANIA:</b> In Oceania, prospects for the developing winter grain crops in Australia have improved following widespread rains throughout most of the main grain-growing areas. Plantings of winter grains are estimated to have risen by 9 percent from the previous season and, assuming normal weather for the remainder of the season, good yields are expected.</p>



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REQUIRING EXTERNAL ASSISTANCE:

Afghanistan

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1/ Both here and in the text, countries with unfavourable prospects for current crop and/or uncovered shortfalls are marked in boldface , 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 September 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 October 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, food shortages are being compounded by the effect of the HIV/AIDS pandemic on food production, marketing and transport. The recently published joint FAO/WFP Crop and Food Supply Assessment reports highlight this factor <http://www.fao.org/WAICENT/faoinfo/economic/qIEWS/english/alertes/sptoc.htm>.

In **eastern Africa**, abundant rains in July and August generally improved the prospects for the 2003 cereal crops. However, severe floods and erratic rains in some areas may still affect yields. The regional climate forecast for the period from September to December 2003 is mixed. Most parts of Uganda, southern Sudan and southern Ethiopia are expected to receive normal to above-normal rainfall, while it has been predicted that large parts of Eritrea, Somalia, Kenya and Tanzania would receive normal to below-normal rainfall. Areas that will require close monitoring include the northern Rift Valley, southeastern districts in Kenya, sections of eastern Ethiopia and the Sool Plateau in Somalia. September–December rainfall varies in impact and importance depending on the geographical location. In northern Ethiopia and Eritrea, for example, these rains complete the moisture requirements for maturing crops, while they constitute the minor growing season in southern Uganda or the main growing season in eastern Kenya and Rwanda. In south central Tanzania, these rains mark the beginning of the long unimodal rainy season. In northern Kenya and Somalia, they are vital for replenishing water resources and regenerating pasture in grazing areas for herds and flocks.

Several countries in the subregion still face serious food difficulties. In Eritrea, about 2.3 million people are now reported to be facing severe food shortages as a result of last year's drought, poverty and the lingering effects of the war with Ethiopia. Similarly, in Ethiopia, a recent multi-agency assessment indicated that the number of people in need of food assistance now stands at about 13.2 million, compared to the earlier figure of 12.5 million. In Tanzania, prolonged drought conditions in several areas have affected a large number of households, with an estimated 1.9 million people in need of food assistance. The situation in northern and eastern areas of Uganda has deteriorated with the escalation of armed conflict. Recent fighting between government forces and rebels has displaced more than 820 000 people, bringing the total number of those in need of emergency assistance to more than 1.6 million.

In **southern Africa**, land preparation for planting of the 2004 cereal crops starting in October has begun under normal weather conditions so far. Production of the 2003 cereals was estimated at 21.8 million tonnes, slightly higher than in 2002. While in most countries of the region the output recovered from the reduced levels of the previous two years, it decreased in Botswana and remained below average in Zimbabwe, Lesotho and Swaziland, as well as in parts of Namibia, Madagascar and Mozambique. Substantial amounts of emergency food aid are still required in these areas, and mainly in Zimbabwe, where the needy are estimated to number some 5.5 million. Food assistance will also be required for 1.1 million returnees in Angola and for large groups affected by HIV/AIDS throughout the subregion. In view of these requirements, WFP has warned of projected critical food aid pipeline breaks for its Southern Africa Regional Emergency Operation; additional donor contributions are needed to avoid disruptions in food distributions during the hunger period that will begin early next year.

In **the Great Lakes region**, the 2004 first-season foodcrops, which will be harvested early next year, have begun to be planted. Good rains in late August and early September have helped the operations in the fields. However, in DR Congo, the civil war continues to disrupt all agricultural activities, particularly in eastern and northeastern areas of the country. Food insecurity and serious nutritional problems have been reported in several provinces. In the Ituri area, which has been affected by heavy fighting in the past months, on the other hand, the security situation and access by humanitarian agencies to needy populations improved with the arrival of UN peacekeepers in early September. In some areas of Burundi, 2003 aggregate foodcrop production (first and second season) declined with respect to last year's level as a result of erratic weather and insecurity. The security situation remains volatile in many areas, including the capital city of Bujumbura, Cibitoke, Kayanza, Bujumbura Rural and Bubanza provinces, where serious violent incidents in the past month have resulted in fresh waves of population displacements. In Rwanda, the 2003 aggregate food production was satisfactory, but in Bugesera Region it decreased as a result of dry weather. However, the secondary third-season harvest and food-aid distribution are temporarily easing the tight food supply situation.

In **central Africa**, the food security situation remains precarious in the Central African Republic, and food production is not expected to increase here this year because population displacements resulted in less planting, a situation compounded by seed shortages.

In **northern Africa**, harvesting of the subregion's 2003 winter crops has been completed, coarse grains (maize and sorghum) are presently being harvested in Egypt and harvesting of paddy is about to start. Aggregate wheat output for the subregion has been provisionally estimated at 16.5 million tonnes, which compares with 12.1 million tonnes in 2002, when crops were severely affected by drought. In Algeria, wheat production in 2003 will be twice as high as the output in 2002, and barley production is nearly three times higher. In Egypt, wheat output increased by some 200 000 tonnes, in line with the government's planting expansion programme, while maize production is anticipated to be about 6.5 million tonnes, over 100 000 tonnes above last year's output. In Morocco, wheat production is tentatively estimated at 5.1 million tonnes, compared to 3.4 million tonnes harvested in 2002 and the previous five-year average of 2.9 million tonnes. Production of barley also increased from 1.7 million tonnes to 2.6 million tonnes. In Tunisia, wheat output more than tripled compared with the 2002 production level, while barley output reached a record high of 616 000 tonnes, compared to a poor 90 000 tonnes last year and a five-year average of 257 000 tonnes.

In **west Africa**, overall crop prospects are favourable in the Sahel. Rainfall was limited in Senegal and Mauritania until late July, and then precipitation increased significantly in August over the main producing areas, replenishing soil water reserves and improving crop prospects. In Cape Verde, abundant rains fell on all agricultural islands in August. In spite of localized flooding in several regions of Burkina Faso, Chad, the Gambia, Mali and Niger, crop prospects remain generally favourable. By contrast, in Guinea Bissau the final outcome of the season will depend on the performance of the swamp rice crop, as prospects for coarse-grain crops have been compromised by large-scale infestations of grasshoppers in northern and eastern regions. In the coastal countries along the Gulf of Guinea, the outlook for the 2003 crops is mixed. Prospects for the main season crops are uncertain in Ghana, Côte d'Ivoire and Liberia, following extended dry weather in July. In Côte d'Ivoire, the food situation remains critical, particularly in the west and the rebel-controlled north. In Liberia, the humanitarian situation has started to improve in Monrovia, following the signing of a peace agreement in mid-August and the deployment of West African peacekeepers, but the overall security and food situations remain critical. Intensified fighting during the current season disrupted farming activities and displaced thousands of families, pointing to a further drop in rice production this year, and hence increased food aid needs.

In **Asia**, relatively good weather conditions, especially at the beginning of the season, and increased applications of fertilizer provided through international assistance in DPR Korea, are expected to result in an improved harvest of rice and maize. However, the country still faces a sizable food deficit. A recent FAO/WFP Crop and Food Supply Assessment Mission is finalizing its report (due out end of October). WFP was able to resume food distributions to all beneficiaries by using a government cereal loan that will be repaid upon the arrival of a maize donation from the Republic of Korea. Total cereal output in mainland China this year is expected to fall by 2.8 percent from 399 million tonnes last year to some 387 million tonnes, because fewer areas were planted and the weather conditions have been unfavourable. In Afghanistan, a record cereal harvest has just been gathered as a result of more precipitation and larger-than-average areas under cultivation. However, access to food will remain difficult for a large number of vulnerable households.

In the **Near East**, food supply prospects are generally favourable mainly due to the fact that harvests were good. A recent FAO/WFP Crop, Food Supply and Nutrition Assessment Mission to Iraq found that this year's good agricultural production contrasts with the enormous economic difficulties faced by the majority of the population. The effects of war and economic sanctions compounded by three years of severe drought (1999–2001) have seriously eroded the asset base of many people and led a large proportion of the population to rely on food rations for their daily subsistence. A marked improvement in the nutritional well-being of the population will require a substantial flow of resources into rehabilitation of the agriculture sector and the economy as a whole.

In the **Asian CIS**, aggregate cereal harvest has fallen this year by about 5 percent from the 2002 harvest. An unusually cold winter and a dry spring compromised cereal crops in parts of Kazakhstan, Georgia and Armenia, while the weather was favourable for crops in the rest of the region. Kazakhstan will remain a major cereal exporter, in particular to other CIS countries in Asia and Europe. Many of the governments in the region continue to encourage cereal production in a drive for cereal self-sufficiency at the expense of cotton, the main industrial crop in Central Asia.

In **Central America and the Caribbean**, the abundant rains typical of the hurricane season were reported over most of the subregion during the past few weeks, with some damage to rural housing and infrastructure. The 2003/04 first season cereal and bean crop harvest is underway in most of the countries, and average to above-average outputs of maize (the main cereal) are provisionally forecast in El Salvador, Guatemala, Honduras and Nicaragua. Food assistance is being provided to targeted families in these countries, particularly women and children who have been seriously affected by natural disasters and recurrent economic shocks over the past few years. In Mexico, the rains have favoured the development of the important spring/summer maize crop in the central and south-central growing areas, and have helped to replenish the water reservoirs for planting 2003/04 wheat crop which will begin in October in the irrigated areas of the northwest. In Cuba, Dominican Republic and

Haiti, average maize outputs are anticipated, particularly in the first two countries. The outlook is also favourable for secondary foodcrops, such as roots, bananas, beans and fruits which are important food staples.

In **South America**, the 2003 wheat crop has been planted in the southern countries and will be ready for harvesting starting in October. The general state of the crops is satisfactory, and early production forecasts indicate that average to above-average outputs will be harvested. Planting of the 2003/04 maize crop has started. In Argentina, planting intentions suggest that as many areas will be planted as in 2002/03, when some 2.4 million hectares were sown, while in Brazil the area planted to maize for the 2004 crop is also forecast as almost equal to this year's, which produced a record crop harvest. In Uruguay and Chile, sowing of the 2004 maize crops has also started, and areas planted are expected to be average or above-average in size. In the Andean countries, the 2003/04 first-season coarse-grain crops are about to be planted in Bolivia, while in Ecuador the 2003 white maize crop has just been harvested. Despite an average out-turn, the total maize (white and yellow) harvest in 2003 has been low for the third consecutive year, mainly as the result of adverse weather conditions. In Peru, harvesting of the 2003 white maize crop is virtually complete, while that of the yellow maize crop is well advanced. An above-average aggregate maize output (white and yellow) is forecast for 2003. In Colombia, normal to abundant rains favoured development of the 2003/04 first-season crops. The harvest is almost finished and land is being prepared for planting of the second-season crops. Average outputs of maize, the main coarse grain, have tentatively been forecast for 2003. In Venezuela, the harvest of the 2003 coarse-grain crops has only just started, and early forecasts suggest below-average maize and sorghum outputs, largely as a consequence of financial constraints experienced by farmers that resulted in reduced use of fertilizers and fewer good quality seeds.

In **Europe**, cereal production has been considerably reduced this year by adverse weather. Harsh winter conditions hindered planting in some areas, and an exceptionally hot and dry summer reduced yields across the continent. With the bulk of the crops already gathered, aggregate cereal output in the EU is now forecast at just 190 million tonnes, 12 percent lower than last year. Among the CEECs, sharply reduced cereal outputs are also expected in virtually all countries.

In the European **CIS**, cereal harvesting is almost complete and the aggregate output for the region has now been estimated at about 94.3 million tonnes, nearly 34.4 million tonnes lower than last year's harvest. The most seriously affected crop is wheat, followed by barley, both of which are nearly 25.5 million and 6.9 million tonnes less, respectively, than last year's harvest. Unusually cold weather and thin snow cover during the winter, followed by a hot, dry spring, as well as torrential rains during the summer harvest are the main explanations for the significant decline in harvest output this year. The aggregate wheat harvest in the region has now been estimated at about 46.9 million tonnes; coarse grains, at 47.1 million tonnes. The Ukraine and Moldova are the countries that have been affected worst, and both will require significant imports to meet domestic consumption requirements. This year's wheat production in Ukraine is 26 percent lower than last year's level, while in Moldova and Russia it is less than 19 percent. Both the Russian Federation and Ukraine were major cereal exporters during 2002/03 marketing year. In the 2003/04 marketing year, Ukraine will be required to import significant amounts of cereals, while the Russian Federation will not be a significant player in the world cereal market. In the Baltic countries, this year's cereal harvest will probably be similar to last year's average-sized harvest. Cereal production in the region has been undergoing a steady decline, as industrial crops and the livestock sector increase. An unusually cold winter combined with an exceptionally dry spring and summer have compromised large areas of cereals in Bosnia and Herzegovina, Serbia and Montenegro and Croatia. The cereal harvest for these three countries is expected to be significantly lower than last year's larger-than-usual harvest.

In **North America**, the United States wheat crop has been estimated at 62.4 million tonnes, which is 42 percent higher than last year's low output. Winter wheat for harvesting in 2004 was sown in early September under generally favourable conditions. Although hot, dry weather in August lowered expectations somewhat for the maize and sorghum crops, the aggregate coarse grain output has also been forecast to rebound from last year's drought-reduced level. In Canada, hot and dry conditions during July and early August diminished prospects for the main 2003 cereal crops, but overall production is still expected to be higher than last year's drought-reduced level.

In **Oceania**, the prospects for the developing winter grain crops in Australia have improved following widespread rains that fell on most of the main grain-growing areas. It has been estimated that 9 percent more winter grain was planted this year than in the previous season. The wheat output for 2003 has now been forecast at 24 million tonnes, more than two-and-a-half times the size of the previous season's drought-reduced crop.

## COUNTRY REPORTS

### AFRICA

#### **NORTHERN AFRICA**

##### ALGERIA (18 September)

Normal seasonal dry weather prevails, although some normal to relatively abundant rains have been reported in the past 3 months, particularly in the central areas of the country. Harvesting of the 2003 cereal crops has been completed and aggregate cereal production is provisionally estimated at a record high of 4.3 million tonnes, a significant recovery from the 2002 drought-affected crop levels of only 1.9 million tonnes. About 3 million tonnes of wheat have been harvested, compared to 1.5 million tonnes the year before and the five-year average of 1.6 million tonnes. Barley output, used mainly for feed, also increased from 358 000 tonnes to more than 1 million tonnes.

Wheat imports for the marketing year 2003/04 (July/June) are expected to decrease over last year's volume of 4.9 million tonnes to some 3.9 million tonnes, reflecting production increases. Maize imports should decrease by 100 000 tonnes from the 1.7 million tonnes volume imported in marketing year 2002/03 (July/June).

##### EGYPT (18 September)

Harvesting of the 2003 irrigated wheat crop was completed in July, and output has provisionally been estimated at 6.8 million tonnes, which compares to 6.6 million tonnes in 2002 and the five-year average of 6.4 million tonnes. The increase is due to the combination of a modest increase in wheat plantings in 2003 with respect to 2002 and the normal to abundant rains that have benefited the crops throughout the season. The enlarged plantings reflects the government's programme to help increase domestic wheat production. Harvesting of the maize crop is well advanced, while that of paddy has recently started. The outlook is good and early forecasts for maize production stand at about an average 6.5 million tonnes, while paddy output should be a tentative 5.8 million tonnes, some 288 000 tonnes above the past five-year average.

Despite the increase in wheat production, wheat imports in marketing year 2003/04 (July/June) are forecast to remain close to last year's level of imports of 6.5 million tonnes, reflecting strong domestic demand. Maize imports should also increase from 5.3 million tonnes to 5.4 million tonnes in marketing year 2003/04.

##### MOROCCO (18 September)

Typical dry weather for the season prevails, although some modest to relatively abundant rains were reported in the north as well as in various areas in the south during the past three months. Wheat production in 2003 has been estimated at a record high of 5.1 million tonnes, which compares to the above-average 3.4 million tonnes collected in 2002. Production of barley, the main coarse grain grown in the country, has also increased substantially from last year's 1.7 million tonnes to a record 2.6 million tonnes. The increase in production has been the result of the favourable rainfall pattern at planting and throughout the developing period. The increased use of fertilizers and other improved farm inputs have also contributed to crop success.

Wheat imports in marketing year 2003/04 should decline as a consequence of the increase in production. Some 1.7 million tonnes of wheat should be imported, which compares to 2.7 million tonnes imported the year before. Maize imports are expected to increase from the level of 2002/03 (July/June), when 850 000 tonnes were imported.

#### TUNISIA (18 September)

Dry seasonal weather has prevailed for the past three months. Harvesting of the 2003 winter crops has been completed; the wheat and barley crops are estimated at an above-average 1.3 million tonnes and 616 000 tonnes, respectively. These compare to 423 000 tonnes and 90 000 tonnes collected in 2002, when the crops were severely affected by drought.

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

### **WESTERN AFRICA**

#### BENIN (11 September)

Precipitation has been generally widespread and abundant, notably in the north. Although rainfall was below average in July in the south, overall crop prospects are favourable. Harvesting of the first maize crop is underway in the south. The millet and sorghum crops are developing satisfactorily in the north. The overall food supply situation is satisfactory.

#### BURKINA FASO (11 September)

Good growing conditions in July were followed by abundant and well-distributed rains in August. The rains were particularly abundant and well above normal during the last dekad. Despite localized floods in the south and southeast, growing conditions are generally adequate for crop development. Millet and sorghum are generally in the heading and early maturation stages. Pastures are abundant. The overall pest situation is calm.

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

#### **CAPE VERDE (11 September)**

**The onset of regular rains in late July permitted widespread maize plantings on the agricultural islands. Rains continued in early August and became more abundant at the end of the month. Soil moisture reserves are adequate in most areas. Crops are emerging satisfactorily. Pastures are regenerating well and the overall pest situation is calm.**

**Following the poor harvest in 2002, cereal import requirements for the marketing year 2002/03 (November/October) were estimated at 108 518 tonnes. Cape Verde is a beneficiary of WFP's Regional Emergency Operation (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 (11 August)

Rains in August were abundant and widespread. Soil moisture may be excessive in some areas, following localized heavy rains, notably in the south-east, but overall crop development up to now may be considered as satisfactory. Early planted cereals are maturing, while those planted later are now at the flowering stage. Pastures are abundant throughout the country.

The overall food supply position is satisfactory. WFP has started providing food assistance to about 41 000 people who have fled into the country to escape fighting in Central African Republic. An estimated 65 000 refugees also entered the country recently after fleeing fighting in the Darfur region of northwestern Sudan.

#### **COTE D'IVOIRE (10 August)**

Rainfall has been generally below average since May, with possible effects on 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 because of the mass population displacements and likely seeds shortages resulting from the civil war.

Although the overall security situation shows improvement, 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. According to the United Nations Office for the Coordination of Humanitarian Affairs (OCHA), several thousand immigrant farmers and agricultural labourers from Burkina Faso and other West African countries are still being forced to leave their host communities in the West. WFP is facing a gap in donor funding for food supplies in the region, and there is no functioning health-care 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 that prompted a new influx of over 30 000 refugees. In the rebel-controlled north, access to food is very difficult for the cotton farmers, who were unable to sell their crop because of the conflict.

More than 1 million people have been displaced by armed 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 EMOP for a period of 8 months (May–December 2003) to assist 588 600 people in Côte d'Ivoire as well as 275 000 people who are in transit or returning to neighbouring countries (Ghana, Burkina Faso and Mali).

#### **GHANA (11 September)**

Overall crop prospects are mixed. Rainfall levels have generally been below average in the south, and a three-week dry spell in May was followed by another dry period in July. These dry spells caused germination failures, necessitating replanting in several regions. By contrast, satellite imagery indicates that weather conditions have been much more favourable in the centre and north.

The crises in Côte d'Ivoire and Liberia have provoked mainly demographic effects on Ghana: influx of third-country nationals in transit through Ghana 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 the needs of these groups is reported to be under heavy strain.

#### **GUINEA\* (1 October)**

Although localized floods have been reported, overall precipitation has been lower than average since May, 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 about 150 000 new arrivals including 14 291 Liberians, 11 780 Ivorians, 13 971 third country nationals and 109 000 Guinean evacuees. The sudden return of these latter has strained domestic resources. While some 22 500 Sierra Leoneans were repatriated during the first half of 2003, renewed fighting in Liberia has prompted a new influx of thousands of refugees. 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 (11 September)**

Rains have been abundant and widespread since July, causing localized flooding. In spite of large-scale grasshopper infestations on sorghum, maize and millet crops in Gabu, Bafata and Oio, where over 50 percent of cereal production was officially estimated to be at risk, hardly any farms have been treated. Although grasshopper damage has creased in the east as a result of more frequent and heavier rains, the final outcome of the season will depend heavily on the performance of the swamp rice crop.

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\* (1 October)**

Following the signing of a comprehensive peace agreement on 18 August and the deployment of West African peacekeepers (known as the ECOMIL force), the humanitarian situation has started to improve in Monrovia, where hundreds of thousands of people have sought refuge in makeshift shelters after protracted fighting in Monrovia. The majority of the estimated 500 000 internally displaced persons (IDPs) have been relocated in camps on the outskirts of Monrovia. A survey conducted by World Vision in late August in Monrovia indicated that nearly 40 percent of young children living in camps for IDPs suffer from malnutrition.

With the improvement of the security situation, WFP launched an extensive distribution programme targeting at least 240 000 people in areas outside Monrovia, including Buchanan, Wilson Corner, Jatondo, Totota, Salala and Fendell.

#### **MALI (11 September)**

Harvest prospects are generally favourable, reflecting abundant and widespread rains in August. Crops are developing satisfactorily. However, heavy rains caused localized flooding, which affected crops in several regions such as Douentza, where 580 hectares of millet/sorghum crops and 77 hectares of rice crops have been damaged. Millet and sorghum are in the leafing or heading stages; transplanting of irrigated rice is still underway. Harvesting of early maize crops has begun in some regions. Pastures are generally good. The overall food supply situation is satisfactory.

#### **MAURITANIA (11 September)**

Following the firm start of the rainy season in mid- to late-July over most of the producing areas, which permitted widespread planting of coarse grains, precipitation remained abundant and regular during August, except in Trarza where mostly dry conditions still prevail. Heavy rains caused considerable casualties and damage to crops and livestock in several localities of Adrar, Brakna, Gorgol, Guidimakha, Hodh EChargui and Hodh El Gharbi. Planting and replanting of *dieri* (rainfed) crops are still under way throughout the country,

except in Brakna and Hodh Echargui, where crops are tillering. Irrigated rice is being transplanted. Pastures are regenerating, which is improving the condition of the livestock.

Approximately 420 000 people throughout Mauritania 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 the 250 000 people who were the 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 and Senegal) included an allocation of 43 632 tonnes of food for Mauritania. As of late June, 78 percent of this amount had been covered by pledges.

Distribution of emergency food aid and the 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 (11 September)

Harvest prospects are generally favourable, reflecting adequate growing conditions since July. In spite of localized heavy rains and floods damaging crops in the Tillabéri and Zinder regions, crops are generally developing satisfactorily, and overall harvest prospects are favourable. Harvesting of early millet, beans and groundnuts has started in the Diffa, Dosso and Maradi regions, improving food supply and lowering prices. Crops are in various stages of development vary according to planting dates in the regions. Pastures are abundant, reflecting good rains in the pastoral zones. The overall food supply situation is satisfactory.

#### NIGERIA (11 September)

Prospects for the current main-season crops are generally favourable following good rains up to now. Moreover, paddy output is forecast to increase this year, reflecting the higher producer prices that have resulted from an increase 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, over 100 000 people were displaced by flooding in Kaduna, northern Nigeria, after the River Kaduna overflowed its banks following heavy rains in early September.

#### SENEGAL (11 September)

Precipitation increased significantly in the centre and the north, where mostly dry conditions prevailed until late July. Although cumulative rainfall as of late August was still below average in most of the Saint Louis, Louga and Diourbel regions, soil moisture reserves are generally adequate for satisfactory crop development. However, the final outcome in these regions will depend heavily on the continuation of the rains through mid-October. In the south and east precipitation has been regular and abundant, causing flooding in several areas. Millet and sorghum are generally at the heading stage in the south. Maize is maturing. Rice is growing satisfactorily, although some fields have been overflowed following heavy rains in August. In the north, coarse grains are tillering/leafing. Overall crop conditions are reported to be much better than last year and cereal production is expected to increase.

In response to the tight food situation following the poor harvests in 2002, the government distributed about 54 000 tonnes of rice to rural households in 2002 and 50 000 tonnes in 2003. Senegal is a beneficiary of WFP's Regional EMOP launched in December 2002 for five drought-affected countries in the west of the Sahel, with an allocation of 3 000 tonnes of food for the 23 300 most vulnerable people.

#### **SIERRA LEONE\* (11 September)**

**Crop prospects are uncertain after below normal rains and extended dry spells in July which affected crop development in some areas. This situation may reverse the optimistic crop prospects that had been reported earlier as a result of the improved security situation combined with increased plantings by returning refugees and displaced farmers.**

**The food supply situation is still satisfactory thanks to last year's larger 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 (11 September)**

Overall crop prospects are mostly favourable despite excessive rains in some areas. Rains in August were abundant and widespread. Some fields may have been flooded, but coarse grains and upland rice crops are developing satisfactorily, and recently transplanted rice is emerging or tillering.

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 significantly. Although cereal prices (which increased sharply last year) have decreased slightly in response mainly to increased commercial rice imports, access to food for many households is still very difficult, notably in groundnut-producing areas.

#### **TOGO (11 September)**

Harvesting of the first maize crop is underway in the south. Millet and sorghum crops are developing satisfactorily in the north, following favourable growing conditions.

Reflecting generally favourable growing conditions during the 2002 rainy season, the aggregate 2002 cereal production is estimated at 740 519 tonnes, slightly above the previous 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 through commercial sources.

### **CENTRAL AFRICA**

#### **CAMEROON (11 September)**

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 localized 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 the 2003 marketing year are estimated at some 367 500 tonnes; it has been anticipated that this will be covered mainly through commercial sources.

#### **CENTRAL AFRICAN REPUBLIC (10 September)**

**Precipitation has been generally widespread and abundant since March, causing localized flooding like in the northeastern town of Sibit, where several days of heavy rains caused considerable casualties and damage to crops and livestock in early September. However,**

food production is not expected to increase this year due to persistent insecurity, notably in the north, seed shortages and fewer areas planted.

The food security situation is still precarious following civil strife from October 2002 to 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\* (22 September)**

The security situation has improved, relatively speaking, in the Ituri district, which had been affected by heavy fighting throughout the past months, following the arrival of UN peacekeepers (MONUC) in early September. Their arrival has also allowed improved food aid distributions to large numbers of displaced persons who were previously inaccessible because of armed conflict in the region. Songolo and Iga-Barriere towns, around the district capital Bunia, are among those who have been reached by humanitarian agencies. The nutritional condition of the population is reported as being very poor.

A recent contribution from Japan has improved the food aid pipeline for the WFP EMOP in the various food-insecure regions of the country, but additional pledges are still needed.

#### **CONGO, REP. OF (1 October)**

Growing conditions are generally satisfactory for maize and root crops. However, insecurity continues to disrupt agriculture and rehabilitation in the areas affected by the conflicts. A resurgence of fighting in the Pool region (around the capital of Brazzaville) in March 2002 led to the displacement of at least 74 000 people, but the exact number is unknown as many people disappeared into the thick forests, and most areas in the region were inaccessible to humanitarian agencies. Following a peace agreement between the Government and rebels in mid-March 2003, a few inter-agency humanitarian assessment missions carried out over a limited area in the region between May and August revealed a critical health and nutritional situation, particularly among children and women.

The government is launching a programme and encouraging the IDPs to return to their villages. Some have already returned to their homes and require assistance to resettle and rebuild their livelihoods. WFP is facing a serious shortfall in resources and shifting its programme to focus more on needed emergency assistance to the most vulnerable (IDPs, returnees and malnourished households) while continuing to participate with other partners in rehabilitation operations as long as resources are available. It is important to note that the Pool Region remains under UN Security Phase Four.

#### **EQUATORIAL GUINEA (11 September)**

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

#### **GABON (11 September)**

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 the bulk of its cereal requirement commercially; for 2003 the requirement has been estimated at around 88 000 tonnes.

SAO TOME AND PRINCIPE (11 September)

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

**EASTERN  
AFRICA**

**BURUNDI\* (15 September)**

Planting of the 2004 first-season foodcrops, to be harvested early next year, has started under normal conditions so far.

Quantities for the 2003 first- and second-season foodcrops have been estimated slightly below last year's production levels, reflecting erratic weather and insecurity. Overall the production of cereals in 2003 declined 3 percent from 2002; pulses, 5 percent; roots and tubers, 3 percent; and banana and plantains, 3 percent. In addition, production of all foodcrops, except root and tubers, remains below the averages from before the civil conflict period (1988–93) which, coupled with the increase in population, has lowered per capita food production. As the most marked reduction has been in pulses, which are the protein source of the majority of the population, food-ration quality has consequently deteriorated as well.

The security situation remains volatile in many areas of Burundi, including in the capital city of Bujumbura, and in Cibitoke, Kayanza, Bujumbura Rural and Bubanza provinces where serious incidents of violence have been reported, resulting in fresh waves of population displacements including over 15 000 people in the Mubimbi commune of Bujumbura Rural province.

**ERITREA\* (23 September)**

Beneficial rains in August maintained favourable conditions for the 2003 main season cereal and pulse crops to be harvested from October/November. However, erratic and inadequate spring rains (March to May), and below-average rains in June that delayed land preparation and sowing in some parts of the country, may affect yields. An interim crop assessment carried out by the Ministry of Agriculture in mid-August has put the expected cereal harvest at about 207 000 tonnes, a strong recovery from last year's decimated crop, but about 12 percent below the average for the five previous years. Continued rainfall through September will be necessary to achieve the forecast mentioned above.

Food grain prices, although stable, are generally high. For instance, sorghum prices in July 2003 were over 50 percent higher than at the same time last year. Terms of trade for pastoralists remained generally stable in June and July. Earlier in the year, the sorghum-per sheep/goat terms of trade rose by more than 50 percent between February and April.

The overall food situation remains severe, with as many as two-thirds of the country's population facing severe food shortages caused by last year's drought. Of these, about 1.6 million were reported to be in need of emergency food assistance. In addition, humanitarian assistance is still needed for the many people internally displaced by the war with neighbouring Ethiopia, returning refugees from Sudan, and children benefiting from WFP's Emergency School Feeding Programme. An FAO/WFP Crop and Food Supply Assessment Mission has been planned to visit Eritrea towards the end of October to appraise 2003 main season cereal production as well as estimate commercial imports/exports and food aid requirements in 2004.

#### **ETHIOPIA\* (23 September)**

Harvesting of the 2003 main *meher* cropping season is expected to begin soon. Favourable rains during August benefited lowland and midland areas that are planted in long-cycle crops, facilitating growth at flowering and full maturity stages. The Water Requirement Satisfaction Index (WRSI), a crop-specific performance indicator taking rainfall into account, has also shown normal to above-normal crop performance as of the end of August. The recently harvested *belg* crop has also registered considerable improvement over last year's crop, but erratic rains in some areas may have affected yields. Normally, the *belg*-season crops are harvested from June to August and the crop accounts for some 10 percent of total grain production; in some areas, however, it provides most of the annual grain production.

Over the past several months, serious food shortages and high malnutrition levels have been witnessed in several parts of the country. The total number of people in need of food assistance in 2003 has now been estimated at 13.2 million. The overall donor response to current food crises has been considerable, and it has managed to prevent the situation from worsening disastrously. Emergency food aid appeals were fully resourced with the exception of a requirement of about 37 148 tonnes of pulses. However, non-food items, which are vital for recovery, were initially underestimated. Based on the results of a recent assessment, the government and UN agencies recently indicated a shortfall of US\$40 million out of the total currently revised non-food requirement of US\$108 million. Particularly under-funded areas include water and sanitation as well as other sectors. The quality of the seeds supplied by donors were also good.

An FAO/WFP Crop and Food Supply Assessment Mission has been planned to visit the country in November/December to appraise 2003 main-season cereal production and estimate commercial imports/exports and food aid requirements in 2004.

#### **KENYA (23 September)**

Harvesting of the 2003 long-rains season maize is well under way in most parts of the country. At the beginning September, over 70 percent of the crop was reported to have been harvested in Eastern, Central, Western and Nyanza Provinces. Rainfall that continued into August, particularly in major production areas, made up for the season's late start. The revised forecast by the Ministry of Agriculture and Livestock Development of this year's "long rains" maize crop still stands at 2 million tonnes, similar to the average of the previous five years.

The steady rise in maize prices since March 2003 reversed during August in most major markets of the country. In Western, Nyanza and parts of North Rift Provinces, prices have declined by 10–12 percent, remained stable in Mombasa and increased marginally in Nairobi. The price decline has been attributed partly to continued supplies from the early harvesting districts and imports. The National Cereals and Produce Board has also helped stabilize high prices by releasing about one million bags of maize from the strategic grain reserve onto the market. However, despite the relative decline, prices remain significantly above the long-term-average.

In most pastoral areas, better livestock conditions were reported; these were due to generally favourable long rains coupled with extended rains in localized areas. Exceptions were the lake shore areas of Turkana, northern Garissa and the northwestern settled areas of Wajir Districts. Livestock prices have also followed the normal seasonal trend by declining steadily as the supply of market animals increases. However, an unusual increase in livestock prices was observed in several markets in Turkana, Moyale, Baringo and in Tana River, close to the Tana Delta, mainly because pastoralists were withholding livestock in order to rebuild herds after significant herd losses after several successive poor seasons.

**RWANDA (15 September)**

Planting of the 2004 first-season foodcrops, to be harvested early next year, has started. Good rains in August and early September have benefited field operations.

Output of the 2003 second-season foodcrops, harvested in July, was estimated to be lower than last year's average level for the same season. However, production was sharply reduced in some areas, mainly the Bugesera Region in the Kigali Rural Province.

A recent joint local WFP VAM/USAID FEWS NET assessment mission in this drought-affected region found that beans planted in swamps during the dry season of June–July were maturing well in general and that farmers had started harvesting, providing relief for the difficult food situation. Food shortage in the seriously affected district of Gashora had been partly alleviated as a result of WFP food distributions, but malnutrition among children remains high as the number of children attending health centres has increased from May to August.

**SOMALIA\* (23 September)**

Initial reports from the Food Security Assessment Unit for Somalia (FSAU) estimate the current "*gu*" season cereal crop in all of Somalia at about 184 900 tonnes (56 percent maize 44 percent sorghum), 8 percent less than the post war average. This is roughly 30 000 tonnes less than the previous estimate during the crop establishment phase (in July), and is a combined result of civil insecurity, pest infestations, and climate conditions. FSAU will present the final results of the "*Gu* 2003 Assessment and Food Security Forecast to *Gu* 2004" October 8th in Nairobi and will issue a comprehensive report at that time.

Recent unseasonable rainfall in northern Somalia is reported to have missed the severely drought affected areas in the Sool Plateau and in most of the upper Dharoor. The food supply situation in these areas continued to deteriorate. A food security assessment carried out by the FSAU in June recently 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. An UN Humanitarian Response Group plans to conduct a multi-agency humanitarian needs assessment in the Sool Plateau area during the first two weeks of October.

**SUDAN\* (23 September)**

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

Recent reports indicate an infestation of tree and desert locust and quelea quelea birds in Western Sudan and River Nile states, which may cause serious crop losses.

The serious food shortages reported in several parts of the country are not expected to improve before the 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 2003 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 EMOP 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–March 2004). FAO also appealed for US\$18.9 million in the 2003 Consolidated Appeal to provide for humanitarian food security programme, including emergency agricultural inputs. Donor response has generally been low, while the response to drought-prone areas has been less than 3 percent of the requested minimum requirement.

An FAO/WFP Crop and Food Supply Assessment Mission has been planned to visit the country from early October to appraise the 2003 main season cereal production and estimate commercial imports/exports and food aid requirements in 2004.

#### **TANZANIA (23 September)**

Serious food shortages were recently reported in several regions, including Dodoma, Shinyanga, Singida, Manyara, Lindi, Coast and Morogoro. Also, there are pockets of food insecurity in Tanga, Kilimanjaro, Arusha, Mwanza, Mara and Tabora Regions, which completely lost their crops to drought. Preliminary forecasts of the 2002/03 food crop production indicate a 10 percent decline compared to last year, caused mainly by extended dry weather in eastern, central, western and southern areas of the country between February and mid-March, and by early termination of the main seasonal rains. Many areas experienced a dry spell of more than three weeks at a critical stage in crop development.

Cereal prices have more than doubled in most parts of the country, contrary to last year and to 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, thus limiting wage-labour opportunities and affecting a large number of households. A food deficit of about 77 489 tonnes is anticipated for the market year 2003/04; it has been estimated that nearly 1.94 million people will require food assistance between October 2003 and March 2004. In addition, a deficit of approximately 3 200 tonnes of various seed types is anticipated, and emergency seed assistance will be needed during the month of October 2003 for the short-, long- and main planting seasons during the next cropping season.

The Government of U.R. Tanzania has recently instructed the Strategic Grain Reserve (SGR) to release 32 000 tonnes of maize to the regions most affected by food shortages; so far 7 200 tonnes have been distributed to 16 critically affected districts.

#### **UGANDA (23 September)**

Harvesting of the 2003 main-season cereal crop is almost complete. Despite a late start to the season, most of the country is reported to have received normal to above-normal rainfall for the season. The continuation of the rains into July made up for the season's late start in March.

Following a steady rise in maize prices since February 2003, which peaked in June at nearly 60 percent above the average for the previous three years, expectations of the arrival of the new crop prompted a drop in prices in July. However, prices in July were still more than 40 percent higher than the average of the previous three years.

Insecurity in northern and eastern Uganda continues to claim the lives of civilians on a daily basis. Since June 2003, the population in the four districts of Soroti, Katakwi, Kumi and Kaberamaido has borne the brunt of frequent brutal attacks, abductions, killings, looting and destruction of property. The displaced population in the Teso region currently exceeds 300 000 people, in addition to over 800 000 in Acholi region. WFP continues to assist IDPs, refugees and other vulnerable groups, but access to these people is possible only with armed military escort.

## **SOUTHERN AFRICA**

### **ANGOLA (19 September)**

Following the massive return of the displaced population to their area of origin and as a result of generally favourable weather and a substantial increase in areas sown, the aggregate cereal production in 2003 rose by almost 25 percent to 670 000 tonnes. Output from other crops – including cassava, pulses and sweet potatoes – is also estimated to have increased, reflecting larger areas sown and good yields.

The cereal import requirement in the 2003/04 marketing year (April/March) is estimated at 709 000 tonnes, including 219 000 tonnes of food aid. One-and-a-half years after the peace settlement, and despite the improvement in domestic production, the number of people in need of food assistance remains unchanged from last year at around 1.4 million. WFP plans to assist over 1 million most vulnerable people including returnee farmers, resettled farmers, socially vulnerable groups, IDPs still in refugee areas, and vulnerable resident farmers. Food aid pledges by mid-September amounted to 134 400 tonnes, of which 109 300 tonnes have already been delivered. Additional resources are urgently needed for the WFP EMOP to assist Angolan refugees in Namibia and avoid a break in the pipeline from October.

All vulnerable groups are in the process of clearing land for planting the imminent 2004 main cropping season. Almost 2 million farmers will receive agricultural emergency assistance over the next few weeks. FAO will provide agricultural kits to farmers in 14 of the 18 provinces in Angola. The kits will include locally adapted varieties of maize, beans, vegetable, millet and sorghum seeds, and agricultural tools such as hoes and machetes. Other humanitarian organizations will distribute an additional 300 000 kits, bringing the total to around 600 000 kits.

### **BOTSWANA (18 September)**

Erratic and poorly distributed rainfall during the growing season seriously affected yields in several parts of the country, leading to a major crop loss. The 2003 cereal crop – mainly sorghum – is estimated at 13 000 tonnes, about half of last year's below-average crop.

However, even in normal years, the country imports most of its cereal needs. It is therefore anticipated that most of the increased import requirement of 281 000 tonnes of cereals for the 2003/04 marketing year will be met by major commercial miller imports. Food aid is being distributed by the government to vulnerable households affected by a reduced harvest.

### **LESOTHO (18 September)**

Crop failure of the secondary winter crop has exacerbated the tight food supply situation in the country following a reduced 2003 main season cereal crop, which was, however, well above the poor harvest level of last year. The southern districts – Mafeteng, Mohale's Hoek, Quthing and Qacha's Nek – have been hardest hit by the winter drought. WFP is distributing food aid to the 27 402 most affected persons in the population. In addition, the FAO/WFP Crop and Food Supply Assessment Mission estimated in April that some 32 000 tonnes of cereal food aid was needed to assist 270 000 people who would be affected by the poor harvest during the main season as well as those with HIV/AIDS. Commercial imports in 2003/04 (April/March) are projected at 288 700 tonnes.

Prospects for the 2004 main-season cereal crops, to be planted beginning in October, are uncertain, as the government has announced that assistance in the form of subsidized agricultural inputs will not be provided this year.

#### **MADAGASCAR (15 September)**

Despite the satisfactory growing conditions for the 2003 main paddy crop in the northern and central areas, drought in the southern provinces has sharply affected the production of maize, which is the main staple here. The government has estimated the number of people in the south who will require food assistance after the poor harvest at about 600 000. WFP is assisting the 270 000 most affected persons from September–December in 18 districts in the south. The government is selling rice at subsidized prices.

The recent surge in international prices of vanilla, a commodity which accounts for some 10 percent of the country's GDP, is expected to help to revive an economy badly affected by the political crisis in 2002.

#### **MALAWI (18 September)**

Land preparation for planting of the 2003/04 main-season cereal crops is under way; the planting outlook remains uncertain. This situation reflects a low level of domestic prices and the reduction of the government's free agricultural inputs distribution programme from 3.2 million beneficiary households to 1.7 million households, coupled with the devaluation of the national currency in recent months resulting in price increases for fertilizer.

The overall food supply situation in the current 2003/04 marketing year (April/March) remains satisfactory following a recovery in cereal production for 2003 and the government's carry-over stocks of 260 000 tonnes of maize at the beginning of the marketing year. Prices of maize in the markets remain below last year's level of around 10 Meticaï/kg, which has been improving food access for vulnerable populations. The government is exporting 100 000 tonnes of maize from its stocks and will keep another 100 000 tonnes for the Strategic Grain Reserve.

Despite the good harvest this year, an FAO/WFP Crop and Food Supply Assessment Mission in April 2003 estimated that 400 000 people will need 30 600 tonnes of food aid because of localized crop failures and food vulnerability related to HIV/AIDS.

#### **MOZAMBIQUE (18 September)**

The 2003 production of cereals was estimated at 1.8 million tonnes, an increase of some 3 percent over last year's above-average crop. The increase is attributed to better crops in the northern and central provinces, while in the southern provinces the harvest was reduced by severe drought.

Following several years of steady increases in food production, the overall food supply position is satisfactory. Maize prices in the central and northern regions have shown seasonal increases in the past month, but are below their levels of a year ago, reflecting the good 2003 harvest and fewer exports to Malawi. By contrast, in southern areas prices remain high and are above last year's level.

Nonetheless, a large number of people still requires food assistance in the southern provinces. A recent survey of the Vulnerability Assessment Committee estimated that 659 000 people in 40 districts were in need of food aid, as they will not have sufficient food available from their own production and will lack the means to access food commercially. This is lower than the estimates of 949 000 people made by the FAO/WFP Crop and Food Supply Assessment in May 2003. WFP is distributing food aid in drought-affected areas, but shortfalls in the food-aid pipeline of maize are anticipated beginning in October. Additional donors' contributions are urgently needed.

#### NAMIBIA (15 September)

The 2003 cereal output has officially been estimated at 102 000 tonnes, 38 percent above last year's poor crop. Normal precipitation in most areas of the country during the growing season aided crops and the regeneration of pastures.

However, in the Caprivi region, prolonged dry weather resulted in widespread crop failures. A report of the Government's Emergency Management Unit estimated that 400 000 people are in need of food aid across the country. A deficit of 7 300 tonnes of cereals is estimated for the Caprivi region alone, where the situation has been aggravated by recent floods. Food assistance is being distributed in the area by the government and international organizations.

#### SOUTH AFRICA (22 September)

Planting prospects for the 2003/04 maize crop from October on are uncertain. A recent planting-intentions survey undertaken by the Ministry of Agriculture, combined with reports on seed sales, indicate a 10 percent reduction in the area planted with maize, to 2.8 million hectares. This reflects both low price expectations and the current level of stocks. By contrast, plantings of the minor sorghum crop are expected to increase sharply this season to 108 000 hectares. The 2003 maize production was estimated at 9.27 million tonnes, 8 percent lower than in the previous year but still average.

The outlook for the 2003 wheat crop, to be harvested towards the end of the year, is unfavourable. Despite overall favourable weather conditions, production will be negatively affected by a 21 percent reduction in plantings. Latest official forecasts points to a crop of 1.67 million tonnes, 28 percent lower than in 2002 and below the average of the past five years.

#### SWAZILAND (18 September)

**Land is under preparation for planting the 2004 main-season cereal crops from October on under normal weather conditions.**

**Erratic rains during the 2002/03 growing season, mainly in the lowland region, resulted in another reduced 2003 cereal harvest. Although production was about 6 percent higher than last year's poor crop, it nonetheless remained well below average at 77 000 tonnes.**

**Cereal import requirement in 2003/04 (April/March) remain high at 128 000 tonnes. This figure includes 24 000 tonnes of food aid for 217 000 vulnerable people affected by a reduced harvest and/or suffering from HIV/AIDS.**

#### ZAMBIA (18 September)

Land is under preparation for planting the 2003/04 cereal crops, scheduled from October on. Early planting prospects are uncertain. While the government has announced a 25 percent expansion of its input subsidy programmes, prevailing low maize prices could result in a reduction in the area planted.

The 2003 cereal harvest was estimated at 1.33 million tonnes, an increase of 80 percent from last year's reduced crop and above average. As a result of this year's good harvest, maize prices in August continued the downward trend that had begun before the harvest, further benefiting access to food. The government has lifted the ban on exports, and plans to buy 206 000 tonnes of maize through the Food Reserve Agency to replenish strategic reserves.

#### **ZIMBABWE\* (22 September)**

Aggregate cereal production in 2003 was estimated close to 1 million tonnes, 39 percent above the poor crop of the previous year but 48 percent below the 2000/01 harvest, which was itself significantly below average. The reduced harvest reflects drought conditions during the growing season and the impact of land reform activities.

Cereal import requirements in 2003/04 (May/April) have been estimated at close to 1.3 million tonnes, including 610 000 tonnes of food aid for 5.5 million people facing food shortages as a result of this year's poor harvest. WFP has been distributing food to 1.1 million beneficiaries in 22 districts and plans to scale its operations upwards as food needs are expected to increase sharply over the next few months before the April 2004 harvest.

Following government deregulation of prices, the inflation rate for August rose to 427 percent, further eroding the incomes of the majority of the population. Basic commodities such as maize meal, cooking oil and meat have become unaffordable for large vulnerable groups. The inflationary pressure is also having a negative impact on the access of farmers to agricultural inputs, while the serious shortage of foreign currency is affecting availability of inputs, mainly fertilizers. This is in turn adversely affecting prospects for the 2004 cereal production.

### **ASIA**

#### **AFGHANISTAN\* (18 September)**

Cereal harvesting in most of the country is complete, and estimates point to a record cereal harvest this year. The FAO/WFP Joint Crop and Food Supply Assessment Mission (CFSAM), which visited Afghanistan between mid-June and 8 July, estimate this year's aggregate cereal harvest at 5.37 million tonnes, compared with an average output of the past five years of just over 3 million tonnes. The harvest this year includes some 4.36 million tonnes of wheat, 410 000 tonnes of barley, 310 000 tonnes of maize and 291 000 tonnes of rice. This year's estimated record harvest benefited from increased precipitation, ample irrigation water availability and significantly large areas planted with cereals, in particular rain-fed wheat planted in marginal lands. Cereal import requirements for the 2003/04 marketing year are estimated at about 392 000 tonnes, just one-quarter of last year's import requirement. Commercial imports in the recent past have amounted on average to about one-half million tonnes per year.

Access to food will be difficult for many households, despite the estimated record harvest. A multi-agency National Risk and Vulnerability Assessment mission will determine the exact amount of food aid requirement for the 2003/04 marketing year in the near future. Following early signs of depressed wheat prices in some parts of the country, the CFSAM has strongly recommended that a significant proportion of the prospective food aid should be domestically procured so that the farmers are not unduly penalized through low wheat prices.

#### **ARMENIA\* (16 September)**

The cereal harvest in Armenia is nearly complete, and the aggregate harvest estimated at 377 000 tonnes is nearly 10 percent lower than the harvest in 2002. The aggregate cereal harvest this year includes an estimated 300 000 tonnes of wheat and some 62 000 tonnes of barley. Aggregate domestic cereal requirements for the 2003/04 marketing year are estimated at 588 000 tonnes. Cereal import requirements are estimated at 211 000 tonnes, including 21 000 tonnes in food aid. This total includes 185 000 tonnes of wheat and 20 000 tonnes of maize.

#### AZERBAIJAN (16 September)

Latest reports point to a cereal harvest of almost 2 million tonnes, which is some 250 000 tonnes less than last year's harvest. This aggregate includes an estimated 1.5 million tonnes of wheat, 232 000 tonnes of barley and 150 000 tonnes of maize. Inadequate precipitation followed by heavy floods in the spring and late summer rains were the main causes of lower-than-expected harvests this year. Aggregate cereal utilization has been estimated at about 2.6 million tonnes and the estimated import requirement of about 644 000 tonnes during the 2003/04 marketing year will be mostly commercially procured. Kazakhstan is set to provide most of the wheat deficit.

#### BANGLADESH (12 September)

The main crop currently in the ground is the aman/monsoon paddy crop, planted in June/July for harvest from October on. Harvesting of the *aus* crop, the smallest paddy crop, has recently been completed. Heavy rains in June and July caused the loss of some 136 000 hectares of paddy land, but brought relief from the long heat-wave for the country. Current forecasts indicate that 2003 paddy production should be a bumper 39.6 million tonnes, some 13 percent above the average of the previous five years, as a result of the application of improved farming technology and planned irrigation.

The wheat output harvested earlier this year is estimated at 1.65 million tonnes, as compared to last year's average production of 1.55 million tonnes and to an average of the past five years of 1.71 million tonnes. The 2003/04 wheat imports are likely to be 1.70 million tonnes, slightly above last year's 1.66 million tonnes.

#### CAMBODIA (12 September)

The rainfed paddy crop, which usually accounts for 80 percent of annual production, was planted in July and is due for harvest in December. Early forecasts for the aggregate paddy output in 2003 point to 4.1 million tonnes, a recovery from the previous year's level of 3.74 million tonnes, when the crop suffered from drought during the planting period. Harvesting of this year's maize crop has started and output is provisionally forecast to be above average. Total 2003/04 cereal supply is expected to meet virtually all the domestic demand. However, there are still a large number of people living below the poverty line and in need of food assistance in the country.

#### CHINA (12 September)

Total cereal output in mainland China in 2003 is expected to fall by 2.8 percent from 399 million tonnes in 2002 to 387 million tonnes, reflecting a decline in planted area and unfavourable weather conditions. Many areas have been switched to more profitable crops such as vegetables, flowers, tea, fruits and soybeans. In the western provinces, the government forestry policy has reduced grain-planting areas, while farmers in the northeast have switched from corn, rice and wheat to soybeans for the higher returns from government support. The reduction of cereal output this year may also be attributed to bad weather. The spring drought in the northeast, flooding along the centrally located Huai river and high temperatures in the south of China hurt summer grain and rice production.

Extremely hot and dry weather in July was relieved in part of southern China in early August. However, little or no rain has been reported in most of Fujian, Jiangxi and Zhejiang since late August, raising concerns about the status of the maturing rice crop, which is usually harvested during October and November. About 30 percent of the late double-crop rice is grown in the three provinces where the driest conditions still prevail. Topsoil moisture in most of the three provinces declined to very low levels during early September as afternoon temperatures close to 40 °C were recorded. Meanwhile, Guangdong, Hunan and Anhui, also major rice provinces, were hit by violent rainstorms during the summer. China's 2003 rice output is currently expected to remain at the same level as the previous year at 174 million tonnes. The output of early rice, already harvested in May

and June, was estimated 3 percent lower than last year at 29.5 million tonnes, the lowest level since 1985.

In the first dekad of September, 200 percent more rain than normal fell across the North China Plain and temperatures were low. The wet and cool weather is unfavourable for the late development of maize. Mainland China's 2003 maize crop is officially estimated at 116 million tonnes, down 4.4 percent from the previous year and 3.7 percent below the average of the past five years.

Facing foreign competition within the framework of the World Trade Organization, Taiwan's farmers are growing less rice on fewer acres. Rice output in 2003 is forecast at 1.7 million tonnes, some 8 percent below the average of the previous five years.

#### CYPRUS (23 September)

The 2003 aggregate output of wheat and barley has been estimated at 97 000 tonnes, slightly below the previous five-year averages. 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\* (16 September)

**Cereal harvesting in much of the country is complete, and latest estimates point to an aggregate cereal harvest of about 627 000 tonnes, some 48 000 tonnes lower than last year's harvest. This aggregate includes some 166 000 tonnes of wheat and 400 000 tonnes of maize. Economic constraints and the lingering effects of the recent drought as well as adverse weather conditions last winter are the main reasons for below-average cereal production. Total 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. Cereal import requirements for the 2003/04 marketing year are estimated at 580 000 tonnes, including 120 000 tonnes in food aid.**

**WFP, under the Protracted Relief and Recovery Operation (PRRO), is assisting some 209 500 people with 50 493 tonnes of food. The current PRRO is scheduled to end in March 2006.**

#### INDIA (12 September)

Despite a late start for the southwest monsoon rains, India's peak monsoon months of July and August recorded above-normal rainfall – the heaviest monsoon rains in five years. Rains have been not only ample but also evenly spread across most parts of the country, except for northeastern parts of Karnataka and Kerala. Western Rajasthan, badly hit by the drought last year, received 29 percent more rain than the normal average during the June–August period, while Gujarat, another state hit by drought last year, also received 29 percent more rains than normal average.

Monsoon rains are critical for the summer-sown kharif crop, which includes rice, oilseeds, cotton, pulses, maize and sugarcane, planted in June and harvested by October. In addition, the moisture left from the monsoon rains helps winter-sown crops such as wheat, sown in November. As a result of good monsoon rains and an increase in rice acreage, prospects for the 2003 rice output point to a 14 percent recovery from last year's dismal level due to the worst drought in 15 years.

Excellent rains in the main maize-growing regions, combined with high maize prices, resulted in increased maize planting, completed in July. Consequently, maize production in 2003 could reach 13 million tonnes, 17 percent higher than last year and 11 percent above the five-year average.

#### INDONESIA (12 September)

The harvesting of the main paddy crop is basically completed, and foodcrops presently in the ground are secondary/dry-season paddy and maize, which are due for harvest from late October on. Some

450 thousand hectares are reportedly affected by drought and some 92 thousand hectares are expected to be lost. However, new plantings in marginal areas are expected to help offset the losses. As a result, overall rice production in 2003 is expected to be similar to last year's at 51.8 million tonnes, and rice imports in 2003/04 are expected to be 3.3 million tonnes. Coarse grain production, principally maize, is officially estimated at 10.37 million tonnes, some 7.4 percent above last year, reflecting the increased planting area in marginal land and higher yields from hybrid seeds.

#### IRAN, ISLAMIC REPUBLIC OF (12 September)

The harvesting of irrigated paddy and maize is under way. The 2003 output of paddy is estimated at 2.5 million tonnes, up 4 percent from last year. Production of irrigated maize has been encouraged so as to meet the increasing demand for animal feed in recent years. The 2003 maize output is estimated at 1.6 million tonnes, 10 percent more than last year's record level. The winter wheat was harvested in June/July, and the recent estimate for 2003 output points to another bumper harvest, reaching 12.9 million tonnes, 447 000 tonnes more than last year. The 2003/04 imports are forecast at 1 million tonnes for wheat and 3.43 million tonnes for total cereals, down 59 percent and 27 percent, respectively, from the previous year, reflecting the consecutive bumper crop years.

#### IRAQ\* (22 September)

**A FAO/WFP Crop, Food Security Assessment Mission which visited Iraq from 5 June to 14 July 2003 estimated the 2003 total cereal production in Iraq at 4.12 million tonnes, about 22 percent above last year's estimates. Cereal stocks in silos across the country are estimated at about 1.63 million tonnes. Planned cereal imports in the marketing year 2003/04 (July/June) are estimated at 3.44 million tonnes, of which 3.2 million tonnes are approved food contracts currently in the WFP pipeline and the earlier outstanding approved, funded and outstanding letter-of-credit issued food contracts between the former Government of Iraq and international food suppliers to be called forward.**

**This year's good agricultural production and the lifting of economic sanctions contrast with the enormous economic difficulties faced by the majority of the population. The effects of war and economic sanctions compounded by three years of severe drought (1999–2001) have seriously eroded people's asset base and forced a large proportion of the population to rely on food rations for their daily subsistence. The Mission's findings indicate that about 55 percent of the population is poor, and 44 percent are currently food insecure. The Public Distribution System (PDS) operated under the Oil-for-Food programme established by UN SCR 986 (1995) is and has been providing food for the entire population of approximately 26.3 million Iraqis. While starvation has been averted, chronic malnutrition problems persist especially among vulnerable groups, including children and mothers, and is largely due to a lack of nutrition diversity.**

**A marked improvement in the nutritional well-being of the population will require a substantial flow of resources into rehabilitation of the agriculture sector and the economy as a whole. Although there is potentially enough food and sufficient food diversity from imports and domestic agriculture, there is insufficient access to nutritious food, and more than half of the population remains without the buying power to obtain a proper diet on a regular basis.**

#### ISRAEL (23 September)

Output of the recently harvested 2003 wheat crop is forecast at about 170 000 tonnes, slightly lower than last year but 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 for last year.

JAPAN (12 September)

The main harvest of rice will commence in October and extend through November. Weather conditions have been unfavourable since mid-June, with low temperatures and little sunshine. Northern Pacific regions in particular are the hardest hit. Production in 2003 is expected to hit the lowest level since 1993, some 8 percent below the average of the previous year's harvest, resulting from a combination of adverse weather and market-oriented rice-policy reforms. In response, the Ministry of Agriculture, Forestry and Fisheries (MAFF) established an ad hoc office to offer guidance to producers on how to minimize losses. There is no rice shortage expected in the market as a whole, mainly because of the two million tonnes of rice currently held in government stocks.

Wheat imports in 2003/04 are expected to be about 5.8 million tonnes, close to the average of the previous five years. Maize import requirement in 2003/04 is forecast at 16.2 million tonnes.

JORDAN (23 September)

Aggregate wheat and barley output in 2003 has been forecast at 147 000 tonnes, about 20 percent above last year's crop, mainly as a result of 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, similar to 2002/03. Coarse grain imports are forecast at 900 000 tonnes, about 12 percent higher than last year.

KAZAKHSTAN (26 September)

The cereal harvest is nearly complete in much of the country, and latest estimates point to an aggregate output of about 16.2 million tonnes compared with nearly 15.9 million tonnes last year. Aggregate cereal harvest this year includes some 12.3 million tonnes of wheat, 2.2 million tonnes of barley and 423 000 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 some areas under winter cereals in the northern parts of the country. Aggregate cereal exports during the 2003/04 marketing year is forecast at about 5.9 million tonnes, compared with 6.2 million tonnes last year. This aggregate includes 5.5 million tonnes of wheat and 389 000 tonnes of barley. Kazakhstan is set to supply much of the wheat deficits in Ukraine, the Russian Federation and other CIS countries caused by poor harvests.

**KOREA, DEMOCRATIC PEOPLE'S REPUBLIC OF\* (12 September)**

**An FAO/WFP Crop and Food Supply Assessment Mission visited the country from 23 September to 4 October 2003 and is finalizing its report. The general findings indicate that the rainfall and temperature at the beginning of the season were more favourable for crop production than they were last year. This resulted in generally better yields of spring crops and of the winter wheat sown at the end of 2002. It also benefited nursery operations and the transplanting of paddy, as well as the timely planting and establishment of maize. Improved availability of electricity resulted in more effective functioning of irrigation pumping-stations. The use of fertilizer increased again this year, and more tractors were operational as a result of better access to fuel and spare parts.**

**This generally positive situation is expected to result in a small increase in crop production (cereal and cereal equivalent) for 2003/04 compared with 2002/03.**

**In spite of this recovery, DPR Korea remains in a state of chronic food emergency and relies on foreign aid to feed its population. Some 3 million beneficiaries were dropped from WFP distributions in July, as a result of delays in the arrival of some confirmed contributions. From 1 August, WFP was able to resume distributions to all beneficiaries by using government cereal loans, which will be repaid upon the arrival of a maize donation from the Republic of Korea. However, unless new pledges are soon confirmed, further cuts in cereal**

**distributions will again be necessary as early as October. The FAO/WFP Crop and Food Supply Assessment Mission is expected visit the field shortly to update the country's food security situation and determine the amount of food assistance requirement for marketing year 2003/04.**

**KOREA, REPUBLIC OF (16 September)**

The Republic of Korea was lashed this year by the worst typhoon in a century. Typhoon Maemi passed through the southern areas of the Republic of Korea with exceptionally powerful winds on 13 September. 87 people have been reported dead and 28 are missing; and 8 938 people are homeless. Rain falling at over 30 mm per hour in the country's southern cities has left large areas of farmland under water and triggered landslides in the provinces. Heavy flooding has forced residents to evacuate their homes for nearby schools and public facilities.

Around 46 000 hectares of rice fields in South Korea are estimated to have been affected and 23 500 hectares are estimated to be flooded.

**KYRGYZ REPUBLIC (18 September)**

Latest reports indicate that the Kyrgyz Republic has just harvested a total of about 1.5 million tonnes of cereals, compared with 1.9 million tonnes last year. This aggregate includes about 1 million tonnes of wheat, 320 000 tonnes of maize and 120 000 tonnes of barley. The wheat harvest this year is some 440 000 tonnes lower than last year's. Aggregate domestic cereal utilization is estimated at about 1.8 million tonnes. The deficit will be covered mainly through commercial imports. This year's reduced harvest was reportedly caused by lower-than-average precipitation during winter and spring, as well as by heavy, torrential rains just before the harvesting season.

**LAOS (12 September)**

Harvesting of the wet-season paddy crop is due to commence from October on. Wet paddy normally accounts for about 85 percent of annual cereal production and is grown predominantly in the lowlands of the Mekong River basin, while a smaller low-performing monsoon crop is cultivated in the uplands. Paddy production in 2003 is forecast at some 2.5 million tonnes, a 3.7 percent increase compared to last year and a 16.6 percent increase compared to the average of the previous five years, as a result of government's self-sufficiency drive and favourable weather conditions.

**LEBANON (23 September)**

The output for the 2003 wheat and barley crop, estimated at about 84 000 tonnes, is slightly lower this year than the 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 780 000 tonnes, slightly higher than last year.

**MALAYSIA (12 September)**

The harvest of the secondary irrigated paddy crop has been completed, and planting of the main paddy crop is under way for harvesting from December until April of 2004. The country produces an average of 2.1 million tonnes of paddy annually, of which 60 percent is from the main- and 40 percent from the off-season crop. The paddy output for 2003 has been forecast at 2.4 million tonnes, which is much higher compared to 2.1 million tonnes in 2002, thanks to favourable weather. The rice import requirement for 2003/04 has been estimated at 0.5 million tonnes. Normally, virtually all wheat and maize requirements are met by imports, which have been estimated at 1.35 million tonnes and 2.5 million tonnes respectively for 2003/04.

#### **MONGOLIA\* (12 September)**

Heavy rains and hailstorms in July pounded northern Mongolia, killing at least 18 people and destroying 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 as destroyed. The storms were the worst that the country has 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 completely drained the economy in terms of national and rural incomes. The wheat harvest is under way and the 2003 output has been estimated at 141 000 tonnes. The 2003/04 total cereal import requirement has been estimated at 248 000 tonnes, accounting for about 63 percent of total domestic consumption. Only a small part of this requirement will be able to be met through commercial imports, as the country has a serious balance-of-payment problem.

#### **MYANMAR (16 September)**

Harvesting the main (monsoon) paddy crop, planted in May/June under normal conditions, is due to begin in late September and will continue until November. Production of paddy in 2003 is forecast to increase by 3 percent following the liberalization of the sector. Anticipated rice exports stand at 1 million tonnes. Maize production is provisionally estimated at 750 000 tonnes, 15 percent higher than one year ago and 72 percent higher than the previous five-year average, reflecting an anticipated increase in the areas sown in hybrid corn and good maize prices. The maize prices have become more attractive as a result of increased demand from the expanding domestic livestock sector as well as an expected increase in exports, which are forecast to increase from 125 000 tonnes last year to 130 000 tonnes this year.

#### **NEPAL (12 September)**

Planting of the 2003 paddy crop has just been completed. The harvest is due from November on. The area planted is estimated at 1.55 million hectares, and the output is provisionally forecast at 4.16 million tonnes, similar to the output of the 2002 crop. Harvesting the 2003 maize crop started in July and should be completed soon; the output is estimated at 1.44 million tonnes, some 5 percent below last year's bumper crop but still 1 percent above average.

#### **PAKISTAN (16 September)**

Heavy monsoon rains were reported to have caused serious damage to rice in the Sindh region, which consists mainly of IRRI varieties. As a result, the forecast for 2003 paddy output has been reduced by some 650 000 tonnes from last estimate to 6.4 million tonnes, which is 5.5 percent below the average of the previous five years. The forecast for 2003/04 rice export has been reduced to 1.6 million tonnes with respect to last estimate. The 2003 coarse grain crop presently being harvested is estimated to yield 2.1 million tonnes, a slightly lower output than last year's.

#### **PHILIPPINES (12 September)**

Rice production losses from flooding in the Philippines from November 2002 to April 2003 have been reported at about 300 000 tonnes, amounting to a loss of PHP2.4 billion (US\$4 361 million). The government has recommended a "quick-turn-around (QTA) planting strategy", called *palagad* (off-season farming), not only to recover the estimated 300 000 tonnes of production loss incurred from the drought in the first half of 2003, but also to boost total output to a level much higher than last year's. The scheme will be implemented on 69 174 hectares of irrigated rice land in key areas of the country, and farmers in the programme will be encouraged to sow certified, good-quality hybrid seeds supplied by the government and private firms; they will receive subsidized fertilizer. Boosted by this programme, the output for 2003 paddy is expected to reach 13.5 million tonnes, up from 13 million tonnes last year. Philippine rice imports in 2003/04 are forecast at 1 million tonnes, similar to last year's level.

SAUDI ARABIA (23 September)

Aggregate output of wheat and barley in 2003 is forecast at 1.89 million tonnes, slightly lower than last year. Imports of coarse grains (mainly barley and maize) in 2003/04 (July/June) are forecast to reach about 7.0 million tonnes.

SRI LANKA (30 September)

Harvesting of the 2003 irrigated Yala rice crop planted in April is underway, while land preparation of the main Maha crop will start soon. The dry-season crop accounts for around 33 percent of aggregate rice production in the country, and the bulk comes from the Maha crop planted in October/November to coincide with the main (northwest monsoon) rainy season. The output of 2003 paddy has officially been estimated at 3.1 million tonnes, the largest crop on record, up 8.4 percent from last year and 11.1 percent from the average of the previous five years, mainly because of a combination of favourable weather condition and prolonged peace after a two-decade-old ethnic conflict. Based on this high production estimate, Sri Lanka is expected not to import rice in 2004.

Imports of wheat and maize in 2004 are anticipated at 950 000 tonnes and 130 000 tonnes, respectively.

SYRIA (23 September)

The output of the recently harvested wheat crop is forecast at 4.5 million tonnes, which is 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\* (17 September)

Cereal harvesting is nearly complete and the latest estimates show that Tajikistan will gather a record harvest of more than 700 000 tonnes of cereals, compared with 612 000 tonnes last year. This aggregate includes some 600 000 tonnes of wheat, 45 000 tonnes of rice, 32 000 tonnes of barley and 28 000 tonnes of maize. Despite a record harvest this year, Tajikistan cannot meet its domestic cereal requirements estimated at just over 1 million tonnes. The total cereal import requirement is therefore estimated at about 336 000 tonnes, including 103 000 tonnes in food aid.

THAILAND (12 September)

Thailand's main rice crop runs from May through October; the second rice crop runs from November through April. Abundant and widespread rainfall is anticipated to boost the country's main crop, although drought in the northeast may affect the production of Hom Mali fragrant rice. The 2003/04 main crop paddy output is forecast at some 21 million tonnes, up 4.7 percent from last year. The aggregate production for the 2003/04 marketing year is anticipated to reach a record 27 million tonnes, 4 percent higher than last year.

**TIMOR-LESTE, DEMOCRATIC REPUBLIC OF (12 September)**

**The lean season will start about two months earlier than usual for those most affected by two consecutive years of drought. Based on the report by a WFP/FAO/Donor Needs Assessment Mission to Timor-Leste from 10–25 August 2003, an estimated 110 000 people will require emergency food aid in order to prevent hunger and further health deterioration among those who will be the worst affected during the November 2003–March 2004 hunger period. These most vulnerable groups are located in the highland areas in Alieu, Ainaro, Ermera, Bobonaro, Covalima, Baucau and the remoter and more isolated areas such as Oecussi and Atauro. Some 12 000 households are estimated as needing about 500 tonnes of agricultural inputs;**

**this presumably represents some 200 tonnes of seeds and 350 tonnes of fertilizer to restart agricultural production in the upcoming cropping season.**

TURKEY (23 September)

Harvesting of the 2003 wheat crop is almost complete. Output for the 2003 wheat crop has provisionally been estimated at 21 million tonnes, which is slightly higher than last year's. Wheat imports in 2003/04 (July/June) are forecast at 500 000 tonnes, compared to last year's 800 000 tonnes. Output from the barley crop, estimated at 7.7 million tonnes, is about 4 percent lower than last year. Maize production is estimated at 2.4 million tonnes, almost the same as for last year.

TURKMENISTAN (17 September)

Cereal harvesting has just been completed and the latest official estimates point to an aggregate cereal harvest of 2.1 million tonnes, 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 annual cereal consumption requirement is estimated at about 2 million tonnes, including 1.87 million tonnes of wheat. If the forecasted harvest materializes, Turkmenistan will be able to meet domestic cereal needs and export a limited quantity of wheat.

UZBEKISTAN (17 September)

The cereal harvest is almost complete and official estimates have now put aggregate output at 5.1 million tonnes, which is a record harvest in the history of the country and some 100 000 tonnes above last year's improved harvest. This aggregate includes 4.77 million tonnes of wheat, 150 000 tonnes of maize and 135 000 tonnes of rice. Improved precipitation and availability of irrigation water, as well as a sustained increase in areas planted to cereals at the expense of cotton have all contributed to record harvests for 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 aggregate cereal imports for the 2003/04 marketing year are estimated at 374 000 tonnes, including 249 000 tonnes of food-quality wheat and 100 000 tonnes of rice.

VIET NAM (12 September)

Harvesting of the winter/spring paddy crop was completed in July. Planting of the tenth-month paddy crop has just been completed. Official estimates for the aggregate 2003 output have been set at 33.5 million tonnes, slightly lower than last year's record crop, but 5.3 percent higher compared to the previous five-year average. Rice exports for 2003/04 are forecast at 4.1 million tonnes, making Viet Nam the world's second-largest rice exporter. In the first eight months of the current year, the country exported 2.96 million tonnes of rice worth US\$557 million, mainly to the Asia-Pacific region and Africa.

The outcome of the 2003 maize harvest is estimated at 2 million tonnes, which is slightly below last year's level but above average. The government is attempting to attain self-sufficiency in maize by expanding area under maize to 1.2 million hectares by 2005 and by increasing the use of hybrids.

YEMEN (22 September)

The output of the main sorghum crop, ready to be harvested, is forecast at about 260 000 tonnes, some 10 percent lower than last year, as a result of reduced planting areas. Breeding conditions for locusts are unfortunately expected to be favourable in areas of recent rainfall in the interior desert of Shabwah and along the Red Sea coast where local flooding has occurred.

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

**COSTA RICA (18 September)**

Heavy seasonal rains continue to hit the country, particularly in the central parts and including the capital. Considerable damage to housing and infrastructure has been reported. Relief assistance has been provided by local authorities. Harvesting of the 2003/04 first season maize crop, mostly maize, has been virtually completed and a below-average output is provisionally estimated. Production of paddy has also been provisionally estimated at an average 290 000 tonnes. Production of beans is anticipated to be a low 16 000 tonnes.

Wheat imports for marketing year 2003/04 (July/June) are forecast at 200 000 tonnes, quite similar to last year's imports, while maize imports – principally yellow – should be close to 565 000 tonnes. Imports of beans should be a relatively high 30 000 tonnes, in response to the consistent demand for this important staple. It is forecast that 75 000 tonnes of rice will need to be imported during marketing year 2004 (January/December).

**CUBA (18 September)**

Despite the remote passage of Hurricane "Isabel" in mid-September, heavy rains are nevertheless reported particularly in the eastern and central parts of the country. No significant damage to crops has been reported so far. Harvesting of the 2003/04 first-season cereal crops is advanced, and an average maize crop is expected. Production of paddy is also expected to be average but insufficient to meet domestic demand. Some 550 000 tonnes of rice will be required as imports in marketing year 2004 (January/December).

**DOMINICAN REPUBLIC (18 September)**

Normal to abundant rains are reported, particularly in the northern parts in mid-September due to the remote passage of Hurricane "Isabel". No damage to crops is reported. Both food and cash crops are reported in good condition, mainly as a consequence of the normal rains that have prevailed throughout the growing season. Harvesting of the 2003/04 first season maize crop is well advanced and satisfactory output is anticipated. A well-above-average paddy output is also expected.

Significant price increases in basic food items and other essential articles continue to be reported, thus affecting some of the most vulnerable population groups in the country. Production of some important food items such as poultry has started to decline in response to lower demand.

Wheat imports in marketing year 2003/04 (July/June) are forecast at 330 000 tonnes, while those of maize stand at 700 000 tonnes. Imports of beans should amount to about 30 000 tonnes.

**EL SALVADOR (18 September)**

**Normal to abundant rains, typical of the rainy season, have been reported in the past few weeks. Some damage to housing and infrastructure is reported. Harvesting of the 2003/04 first-season maize crop, the main cereal, has been completed and a good output collected. Production of sorghum is expected to be about average. Bean production is also anticipated to have reached an average level. Food assistance from the international community (WFP's Protracted Relief and Recovery Operation 10212.0) is presently being distributed to families affected by the natural disasters of recent years, as well as by late economic shocks, such as the international coffee crisis. Families in the department of Ahuachapán, in the extreme west of the country, have recently benefited from this aid. The overall Programme should extend until February 2006, and some 100 000 people per year should benefit from it.**

#### **GUATEMALA (18 September)**

**Intense seasonal rains were reported, particularly in the capital of Ciudad Guatemala and the surrounding areas in early September. Abundant rains were also reported in the department of Chiquimula in the east, and in San Marcos in the west, with some damage to crops. Harvesting of the 2003/04 first-season cereal crops, mainly maize, has been virtually completed, and a more-or-less average output has nevertheless been collected despite the adverse heavy rains of the past few weeks. Food assistance from the international community under WFP's Protracted Relief and Recovery Operation 10212.0 has been recently initiated. The Programme should extend until February 2006 to benefit some 200 000 persons per year, in particular women and children. The assistance should help mitigate the disastrous effects of the economic shocks and recurrent natural disasters of recent years.**

#### **HAITI (18 September)**

Abundant rains are being reported particularly in the northern parts due to the remote passage of Hurricane "Isabel". Harvest of the 2003/04 first-season rainfed maize crop has been completed, as well as planting of the first sorghum crop. Production should be close to the average output of the past five years. Harvest of the important irrigated paddy crop has been also completed, while the rainfed crop harvest is under way. An average output is anticipated for this year as well.

Wheat imports for marketing year 2003/04 (July/June) are provisionally forecast at about 295 000 tonnes. Maize imports in marketing year 2003/04 (July/June) should decline from last year's 70 000 tonne-level to about 65 000 tonnes. Imports of rice in 2004 (January/December) are presently forecast at about 230 000 tonnes.

**Food assistance from the international community continues to be distributed through development projects to some sectors of the population, particularly in the recurrently drought affected areas of the north-west and some places in the centre.**

#### **HONDURAS (18 September)**

**Heavy rains typical of the hurricane season have affected field crops in the locality of Pimienta, in the northwest. Heavy rains are also reported in other parts of the country but with no apparent damage to crops. Harvest of the 2003/04 first-season cereal crops, principally maize, has been virtually completed, and an average output is provisionally estimated. Food assistance from the international community (WFP's Protracted Relief and Recovery Operation 10212.0) continues to be distributed to families affected by the natural disasters that have recurrently taken place over the past five years. This assistance supports women and children in particular. International assistance should also help alleviate the adverse effects of severe economic shocks of recent years, such as the international coffee crisis. Assistance will be provided until February 2006 and should benefit about 240 000 people per year.**

#### **MEXICO (30 September)**

The northwestern parts of the country were affected by the passage of Hurricane "Marty" around 22–24 September. An official estimate of losses incurred to the agricultural sector has not yet been made available, but damage to some 300 000 hectares of crops, maize and sorghum in particular, is reported. Emergency relief has been provided by authorities. Abundant rains due to the remote passage of Hurricane "Linda" in mid-September, on the other hand, have refilled water reservoirs in the important wheat producing states in the north-west, where land is being prepared for planting of the 2003/04 irrigated wheat crop from October. Widespread normal to abundant rains across the large producing southern and south central states of Jalisco, México, Michoacán, Chiapas and Puebla have continued to provide adequate moisture to the important spring/summer maize crop, currently in its developing stage. Some isolated flooding has been reported, but with no real damage

to crops. The harvest is due from October on, and total production in 2003, which includes the output from the 2002/03 fall/winter crop, is tentatively forecast at 19 million tonnes, some 500 000 tonnes above the average production of the past five years. Sowing of the 2003 sorghum crop is virtually completed. Harvest operations should start in October, and early forecasts point out to a total sorghum production in 2003 of about an average 5.6 million tonnes. This includes the recently harvested output from the largest producing state, Tamaulipas.

#### **NICARAGUA (18 September)**

**Normal to abundant rains, typical of the hurricane season, are being reported over most of the country. Heavy rains were also reported in August, particularly in the localities of Nandaime, Masatepe, Estelí and Jinotega, but no damage to crops has been reported so far. Harvest of the 2003/04 first-season cereal and bean crops is well advanced, while planting of the second-season crop (*postrera*) has only just started. Production of maize, the main cereal, from the first crop is forecast at a high 335 000 tonnes. An average sorghum output is also forecast. A good first-crop bean production of almost 38 000 tonnes is expected. Food assistance from the international community (WFP's Protracted Relief and Recovery Operations 10212.0) is being provided and should continue until February 2006. The assistance is targeted at families, particularly women and children, affected by natural disasters and the recurrent economic shocks of the past five years. The number of people to benefit from this assistance is estimated at about 150 000 per year.**

#### PANAMA (18 September)

Heavy rains and flooding were reported in September in various parts of the country, particularly in the northwest in the municipality of Changuinola and surroundings. Damage to rural infrastructure is reported. Local alerts have been declared and emergency relief provided. More heavy rains, typical of the hurricane season, are still forecast in the weeks ahead. Harvesting of the 2003/04 first-season cereal crops is underway.

### **SOUTH AMERICA**

#### ARGENTINA (18 September)

Planting of the 2003/04 wheat crop has been completed under generally dry weather conditions. Lack of adequate soil moisture is reported in large areas of the provinces of Cordoba and Santa Fe, which could provoke adverse effects on resulting yields. The main producing provinces of Buenos Aires and La Pampa have also been affected by the absence of adequate rains. The harvest is due from late October/early November, and early official forecasts indicate an about average output of some 14.5 million tonnes, higher than the 12.3 million tonnes collected last year. Planting of the 2003/04 maize crop has only just begun, and adequate conditions for sowing have been reported in most areas. Intended plantings are provisionally forecast at about 2.4 million hectares, which is similar to the planted area size for 2002/03.

The tight food-supply situation which had so seriously affected segments of the population, as a consequence of the economic problems faced by the country in past few years, has largely been mitigated through government relief programmes carried out in collaboration with international welfare organizations.

#### BOLIVIA (18 September)

Harvesting of the 2003/04 first-season (winter crop) in the eastern department of Santa Cruz is well advanced, while land is being prepared for the planting of the second-season crop beginning in October. The outlook is good, and an average wheat output is expected from the winter crop. Planting of the 2003/04 first-season coarse grain crops, principally maize, is about to start.

Wheat imports in marketing year 2003/04 (July/June) should be about 250 000 tonnes, which is close to the level of imports for last year.

#### BRAZIL (18 September)

Harvest of the 2003 wheat crop continues in the main southern producing states of Parana and Rio Grande do Sul. A bumper crop of something over 5 million tonnes is officially forecast, largely the result of favourable weather conditions. This compares to the above-average 2.9 million tonnes harvested in 2002. Improved technology and a more intensive use of fertilizers have also been important in the anticipated success of the crop. The increase in production should help reduce the country's reliance on wheat imports, which are estimated at about 7 million tonnes per year on the average. Production in 2003 is likely to cover half of the country's yearly wheat utilization requirement, and imports in marketing year 2003/04 (October/September) should considerably decline from the level of 6.8 million tonnes imported in 2002/03. Harvesting of the 2003 second season maize crop (*zafrihna*) has been recently completed, and a record second-season crop of 12.6 million tonnes has been obtained, thus making maize output for the year (both crops) a historical record at 47.3 million tonnes. Maize exports in marketing year 2003/04 (April/March) should considerably increase over last year's levels, and exports of some 5.5 million tonnes are presently forecast.

#### CHILE (18 September)

Growing conditions of the 2003/04 wheat crop are reported as adequate. The area planted is officially estimated at 433 000 hectares, which compares to the above-average 416 000 hectares planted in 2002/03. The harvest should begin late in November; a satisfactory output has already been forecast, assuming that adequate weather conditions persist. Planting of the 2003/04 maize crop has only just started, and the intended planted area should increase slightly from the above-average 110 000 hectares planted in 2002/03.

Wheat imports in marketing year 2003/04 (December/November) are tentatively forecast at 300 000 tonnes, close to last year's level. Maize imports in marketing year 2003/04 (April/March) are provisionally estimated at 1 million tonnes. This compares to about 1.1 million tonnes of maize imported the year before.

#### COLOMBIA (18 September)

Normal to abundant rains have benefited the 2003/04 first-season cereal crops. The harvest is well advanced, while land is being prepared in some areas for planting the second-season crops. Maize output in 2003 is tentatively forecast at 1.2 million tonnes, which compares to an average of 1 million tonnes of the past five years. An average sorghum output of some 230 000 tonnes is anticipated. Production of paddy, an important food staple in the population's diet, is provisionally estimated at 2.5 million tonnes this year, some 13 per cent higher than the previous five-year average.

Wheat imports in marketing year 2003 (January/December) are provisionally estimated at about 1.2 million tonnes. Maize imports in 2003 (January/December) should be about 2.1 million tonnes.

Food assistance from the international community continues in various parts of the country for internally displaced populations, victims of the civil strife that has affected the country for so long now.

#### ECUADOR\* (18 September)

**Harvesting of the 2003 white maize crop, which accounts for about 25–30 percent of domestic maize production (white and yellow maize) has just been completed. Maize production for the year is provisionally estimated at 300 000 tonnes, slightly above the low output collected in 2002. The poor results this year are due mainly to the adverse weather which affected the yellow maize crops at planting and subsequently during the development**

**period. Aggregate maize (white and yellow) production in the past three years has remained at a low of 300 000 tonnes per year, well below the volume of 611 000 tonnes collected in 2000.**

**Wheat imports in marketing year 2003/04 (July/June) are expected to be about 475 000 tonnes. Early forecasts place maize imports in marketing year 2004 (January/December) at 350 000 tonnes, very similar to imports in 2003.**

PERU (18 September)

The peak of the wheat crop harvest operations in 2003 has been reached and the output collected is above that of 2002 for the same period. The harvest should continue through October; total wheat production for 2003 is provisionally estimated at 190 000 tonnes, some 8–9 percent above the average of the past five years. Wheat is grown mostly in the highlands and is used for direct local consumption. Harvesting of the 2003 white maize crop has been completed, while the yellow maize crop harvest is well advanced. Outputs collected so far exceed those of 2002 for the same period and early forecasts for aggregate maize production (yellow and white) for 2003 predict an above average output of 1.3 million–1.4 million tonnes, which compares to 1.29 million tonnes harvested in 2002.

Despite the above-average wheat output obtained in 2003, wheat imports in marketing year 2004 (January/December) are expected to increase slightly from the relatively high level of imports in 2003, thus reflecting the strong demand for this staple in the population's diet. Maize imports in 2004 (January/December) are forecast at some 600 000 tonnes, close to the level of imports in 2003.

URUGUAY (18 September)

Planting of the 2003/04 wheat crop continues. Total plantings are officially forecast at about 113 000 hectares, which compares to the 137 000 hectares planted in 2002/03. The harvest is due to start in late October. Official forecasts indicate that some 120 000 hectares of barley will also be planted in 2003/04, compared to 103 000 hectares sown the year before. Planting of the 2003/04 maize crop is about to start, and intended plantings are tentatively forecast at about 50 000 hectares, close to last year's level. Planting of the important 2003/04 paddy crop is due to start in October, and early forecasts of intended plantings show about 150 000 to 160 000 hectares, close to the 2002/03 level of plantings.

**VENEZUELA (18 September)**

**Although some dry weather was reported in the first half of the month in some coastal areas, the country as a whole has received above-normal rains for the past three months, resulting in land- and mudslides in various Andean States, causing severe damage to rural housing and infrastructure. Harvest of the 2003 coarse-grain crops has recently started. Early forecasts point to below-average maize and sorghum outputs, largely because of lack of fertilizers and quality seeds. This situation is due to a number of financial constraints imposed on farmers resulting from the difficult economic situation within the country. The harvest of the important irrigated paddy crop is under way.**

## **EUROPE**

EU (18 September)

Widespread rain in early September arrived too late to benefit already maturing summer crops (mostly maize) and was thus only disruptive to the harvest, which is still under way in several countries. However, the precipitation was timely and welcome in as much as it improved topsoil moisture for the winter grain planting.

The FAO's latest forecast for the 2003 drought-struck cereal output in the region now stands at about 190 million tonnes, 12 percent down from last year and the smallest crop since 1995. The estimate of the aggregate EU wheat crop has been revised downward further in the past few weeks to 92 million tonnes, which is 12 percent lower than 2002. The latest revision reflects another trimming of the estimate for France, which was already expected to account for the bulk of this year's decline. The forecast for coarse grains has also been reduced since the previous report to 94 million tonnes, also about 13 percent down from last year's crop. Output of barley is now estimated at about 46 million tonnes compared to 48.5 million tonnes last year, while with predominantly dry and hot weather persisting throughout August, hope for a late recovery in the maize crop also faded and this crop output is now forecast at just 32 million tonnes, compared to some 41 million tonnes in 2002. The situation for the paddy crop in the region is similar: FAO forecasts the 2003 crop at 2.4 million tonnes, 7 percent less than last season.

#### ALBANIA (16 September)

Although recent years have witnessed a downward trend in basic cereal production, this year's output has likely shrunk beyond expectation because of drought and high temperatures. The aggregate cereal crop will probably be no more than 500 000 tonnes, compared to an average of about 700 000 tonnes during the nineties. 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 December 2003.

#### BELARUS (16 September)

The cereal harvest in Belarus is nearly complete, and latest reports indicate that the harvest this year will total 4.5 million tonnes, which is about 780 000 tonnes lower than the 2002 harvest. The aggregate cereal harvest this year includes some 1.6 million tonnes of barley, 1.5 million tonnes of rye and 640 000 tonnes of wheat. If the forecasted harvest materializes, cereal import requirements can be estimated at 568 000 tonnes, including 375 000 tonnes of food quality wheat and 193 000 tonnes of coarse grains.

#### BOSNIA-HERZEGOVINA (18 September)

Latest reports point to an aggregate cereal harvest of about 1 million tonnes, some 290 000 tonnes lower than last year's improved harvest. This total includes some 130 000 tonnes of wheat and some 800 000 tonnes of maize, compared with 297 000 tonnes of wheat and 912 000 tonnes of maize in 2002. An unusually cold winter and a dry spring as well as torrential rains during the summer affected cereal yields. Aggregate cereal utilization has been estimated at about 1.6 million tonnes. The estimated deficit of 510 000 tonnes will be mainly commercially procured, while the food aid requirement is estimated at 100 000 tonnes.

#### BULGARIA (18 September)

**Cereal output in 2003 has been reduced to just over 4 million tonnes as a result of adverse autumn planting weather and a severe drought and heat-wave during the summer. Output of wheat, the major food crop, is officially estimated at 2.2 million tonnes, about 40 percent lower than last 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. Even with exports likely to be reduced to a minimum in 2003/04 in order to maintain normal consumption levels, it is likely that more substantive imports will be necessary than in recent years; stocks will have to be drawn down as well. As of mid-September the government had already begun to sell stocks from its contingency reserves on the domestic market, and weekly sales are expected to continue in the coming months for a total quantity of up to 300 000–400 000 tonnes. The government is also reported to be negotiating import deals with the United States and Kazakhstan.**

#### CROATIA (18 September)

Latest estimates point to an aggregate cereal harvest of about 2.7 million tonnes, compared with a record harvest of 3.7 million tonnes in 2002/03. This year's total cereal harvest includes some 600 000 tonnes of wheat, 2 million tonnes of maize and 85 000 tonnes of barley. The poor harvest this year has been due to drought throughout the spring and summer. The annual cereal consumption requirement is estimated at about 3.1 million tonnes. The deficit will be covered through commercial imports and stocks drawn down from last year's good harvest. However, Croatia will not be able to export any significant quantity of cereals during the 2003/04 marketing year; last year cereal exports totalled 450 000 tonnes.

#### CZECH REPUBLIC (19 September)

**Final harvest estimated point to a smaller cereal output than was earlier forecast, confirming 2003 as the lowest production year in recent history. Wheat output has been estimated at just under 2.7 million tonnes, compared to an average of 4 million tonnes over the past five years. As in other parts of the region, the reduction is due to smaller plantings, harsh winter conditions and spring/summer drought and heat-wave. Although the normal domestic grain surplus will not be produced 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 (18 September)

Cereal harvesting is nearly complete and latest estimates indicate that production stands at 525 000 tonnes, slightly below the harvest in 2002. This aggregate includes some 150 000 tonnes of wheat and 375 000 tonnes of coarse grains, mainly barley. Aggregate cereal import requirements for the ensuing marketing year are estimated at 211 000 tonnes, including 121 000 tonnes of wheat and 90 000 tonnes of coarse grains.

#### HUNGARY (18 September)

**The 2003 wheat crop has been estimated at 2.92 million tonnes, 25 percent down from the already relatively low crop of 3.9 million tonnes last year, and the smallest since 1999, the previous bad drought year. Imports are not expected to be necessary during 2003/04, given that output was still sufficient to meet normal consumption needs; significant carryover stocks from the previous year are reported as well. However, it is likely that exports will be sharply reduced compared to the average of the past few years. The summer maize crop has also suffered from the lack of moisture, and latest official forecasts put the output at 5.2 million tonnes, compared to the average crop of 6.4 million tonnes last year.**

#### LATVIA (18 September)

Cereal harvesting is nearly complete and the aggregate harvest, estimated at 980 000 tonnes, is about 25 000 tonnes lower than last year's harvest. This aggregate includes some 400 000 tonnes of wheat and 580 000 tonnes of coarse grains. Harsh weather conditions in winter compromised some crop areas. The total cereal import requirement for the 2003/04 marketing year is forecast at about 131 000 tonnes, including 90 000 tonnes of wheat.

#### LITHUANIA (18 September)

Latest reports point to an aggregate cereal harvest of about 2.3 million tonnes this year, which is some 200 000 tonnes below the harvest in 2002. This year's aggregate cereal harvest includes some 790 000 tonnes of wheat, 970 000 tonnes of barley and 420 000 tonnes of rye. Unfavourable weather conditions in winter and heavy rains just before the harvest compromised some of the

winter crops this year. Lithuania is seen to remain a net cereal exporter with exports forecast at 118 000 tonnes and imports at just over 100 000 tonnes during the 2003/04 marketing year. During the 2002/03 marketing year aggregate cereal exports were estimated at 174 000 tonnes and imports at 141 000 tonnes.

#### **MOLDOVA (16 September)**

Aggregate cereal harvest is estimated at about 1.2 million tonnes, which reaches only 47 percent of last year's harvest level. A severely cold winter and an exceptionally dry spring have compromised more than three-quarters of autumn and spring grains, wheat in particular. More than 40 percent of the 343 000 hectares planted with wheat and about 71 000 hectares planted with barley were completely decimated, while yields on the remaining wheat and barely areas are less than one-third of the average yields. FAO staff who visited Moldova from 7–12 July 2003 estimated the wheat harvest at about 220 000 tonnes and barley at 45 800 tonnes (mainly spring), compared with 1.12 million tonnes of wheat and 256 000 tonnes of barley in 2002. The maize harvest has been estimated at about 967 000 tonnes, compared with almost 1.2 million tonnes last year.

Aggregate cereal import requirements for the 2003/04 marketing year are estimated at 560 000 tonnes, including 430 000 tonnes of wheat and 120 000 tonnes of barley. Moldova exported a record 1.1 million tonnes of cereals during 2002/03 marketing year including some 277 000 tonnes of wheat and 68 000 tonnes of maize, when international prices were significantly low. FAO is in the process of distributing 1 000 tonnes of winter wheat seeds to some of the most vulnerable farmers under an emergency assistance project.

#### **POLAND (19 September)**

As in several other countries in the region, Poland's 2003 cereal crops have suffered from a harsh winter and summer drought. The aggregate small-grain output (all grains excluding maize) has been officially estimated at 22 million tonnes, compared to 24.6 million tonnes last year. Maize output is expected to remain similar to last year's level of about 2 million tonnes. Despite the likelihood of lower average yields, maize plantings are estimated to have increased.

#### **ROMANIA (18 September)**

Romania was one of the central and eastern European countries that was the hardest hit by drought in 2003. The wheat crop was devastated, with its output reduced to an estimated record low of 2.5 million tonnes, compared to 4.4 million tonnes last year and over 5 million tonnes on average over the past five years.

After being a net wheat exporter for the past two years, the government has banned exports for one year; significant wheat imports are expected to be necessary in 2003/04. Import taxes have been removed for imports of cereals totalling 1.6 million tonnes, including 1 million tonnes of wheat, and by early September it was reported that some 300 000 tonnes of wheat had already been imported during August.

The outlook for the summer maize crop is still uncertain. As of early September, the harvest was still less than 20 percent complete. Official reports continue to suggest that the area of maize for harvest is larger than it has been in the past five years, so even with below average yields expected, the output could still be around 8 million tonnes.

#### **RUSSIAN FEDERATION (29 September)**

The cereal harvest in the main grain-producing regions of the Russian Federation is nearly complete, although the harvesting campaign has been slower than usual in much of the country. Aggregate cereal harvest is now estimated at 68.7 million tonnes, which is nearly 16 million tonnes lower than last year's bumper harvest. This aggregate includes some 41 million tonnes of wheat, 15

million tonnes of barley and 5.7 million tonnes of rye. Severely cold winter conditions coupled with thin snow cover and an exceptionally dry spring compromised this year's cereal harvest. In addition, abnormally heavy rains during the past couple of months have slowed the pace of harvesting and damaged large areas of spring wheat. Land preparation for the winter cereal planting is well under way, and higher cereal prices seem to have encouraged farmers to dedicate extra resources to cereals for harvest next year.

Aggregate cereal exports for the 2003/04 marketing year are forecast at 5.2 million tonnes, including 2.9 million tonnes of wheat and just over 2 million tonnes of barley. Aggregate cereal exports during 2002/03 marketing year amounted to almost 18.3 million tonnes, including 14.5 million tonnes of wheat and 3.5 million tonnes of barley.

**Poor security and military operations continue to disrupt socio-economic activities in Chechnya. Targeted food aid, therefore, continues to be necessary for the internally displaced and vulnerable population. WFP has begun distributing about 34 011 tonnes of basic food commodities to some 290 500 internally displaced and vulnerable populations in Chechnya and Ingushetia.**

#### **SERBIA AND MONTENEGRO (18 September)**

Latest reports point to an aggregate cereal harvest of about 6.7 million tonnes, which is almost 1.5 million tonnes lower than the 2002/03 marketing year harvest. This year's aggregate cereal harvest includes some 1.4 million tonnes of wheat and 4.9 million tonnes of maize, which compares with 2.24 million tonnes of wheat and 5.5 million tonnes of maize in 2002/03 marketing year. The wheat harvest reflects a reduction in planted area by 100 000 hectares in 2003 from 700 000 hectares planted in 2002. In addition, the unusually cold winter and an exceptionally dry spring and summer compromised crop production this year. The government has recently banned all exports of wheat and maize to ensure that sufficient supplies are available within the country. Cereal import requirements for the 2003/04 marketing year have been estimated at about 550 000 tonnes of wheat, 50 000 tonnes of maize and 10 000 tonnes of rice.

**The internally displaced and vulnerable population continues to require food and other assistance. Under the current Protracted Relief and Recovery Operation, which began in July 2002, WFP is assisting some 59 126 refugees in Serbia and Montenegro, while ICRC is assisting some 59 000 internally displaced persons (IDPs).**

#### **SLOVAK REPUBLIC (19 September)**

The bulk of the cereal harvest was complete as of early September. At that time, the aggregate output of small grains (all grains except maize) was officially estimated at about 1.9 million tonnes, 19 percent less than in the previous year. The maize crop, which still has to be harvested, is forecast at about 750 000 tonnes, similar to last year's level.

#### **THE FORMER YUGOSLAV REPUBLIC OF MACEDONIA (19 September)**

The 2003 wheat output has been estimated at a low 220 000 tonnes, which is about 30 percent below the average of the past five years. Delayed planting and high spring temperatures contributed to poor yields. At the estimated level, wheat production is below normal consumption requirements. However, the State Commodity Reserves Directorate is reported to have a surplus of wheat stocks, and the government will probably allow a quantity of wheat to be imported duty-free in 2003/04.

#### **UKRAINE (16 September)**

Cereal harvesting in much of the country is nearly complete and the aggregate harvest has now been estimated at 19.96 million tonnes compared with more than 36 million tonnes last year. This aggregate includes 5.1 million tonnes of wheat, 7.45 million tonnes of barley and

**5.4 million tonnes of maize. Severely cold temperatures, thin snow cover, frost and an unusually dry and late spring were the main causes of the significant drop in production. In addition, unusually heavy rains during the past couple of months have further compromised cereal production by delaying harvesting and damaging crops. Much of the cereal output – in wheat in particular – is not of food quality.**

**Ukraine needs to import some 3.35 million tonnes of cereals, mainly food-quality wheat, to meet consumption requirements during the 2003/04 marketing year. Aggregate cereal exports during the 2003/04 marketing year are forecast at about 2.7 million tonnes, compared with 10.52 million tonnes last year. This year's cereal exports include some 1.93 million tonnes of barley and 742 000 tonnes of maize.**

## **NORTH AMERICA**

### **CANADA (18 September)**

Predominantly hot and dry conditions during July and early August have diminished prospects for the main 2003 cereal crops, but production is still expected to turn out much higher than last year's drought-reduced level. The latest official figures issued in mid-September, with the harvest already well under way, forecast the country's 2003 wheat crop at about 21 million tonnes, down 700 000 tonnes from the forecast a month earlier but still 34 percent larger than the poor crop in 2002. Barley output was forecast at some 12 million tonnes, compared to just 7.3 million tonnes in 2002.

### **UNITED STATES (18 September)**

The 2003 wheat harvest was virtually complete by the first week of September, with the last of the spring wheat crops being gathered in late August. The aggregate wheat output for the year was officially estimated at 62.4 million tonnes in September, unchanged from a month earlier, which is 42 percent higher than in 2002. As of mid-September, it was reported that about 16 percent of next year's winter wheat crop had been planted, which was on pace with last year, but a bit ahead of the five-year average. The 2003 coarse-grain output is also forecast to rebound from last year's drought-reduced level to about 276 million tonnes, which would be about 13 percent up from last year. The latest forecasts for maize and sorghum are slightly down from earlier expectations following hot and dry weather across much of the Great Plains and the northern Corn Belt during most of August. The forecast for 2003 paddy rice production remains at around 9 million tonnes, 8 percent down from the previous year.

## **OCEANIA**

### **AUSTRALIA (18 September)**

Widespread rains throughout most of the main grain growing areas have improved prospects for the developing 2003 winter grain crops. Although winter grain sowing was delayed in many areas because of the late arrival of pre-sowing rains, a late spurt of planting activity brought the final winter grain area to about 19.4 million hectares, 9 percent more than the previous season. Assuming that rainfall will be about average for the remainder of the growing season, wheat output in 2003 is now forecast to reach 24 million tonnes, more than two-and-a-half times the previous season's drought-shrunken crop. Production of barley is also expected to more than double to 7.3 million tonnes. Output of the 2003 summer crop harvest dropped sharply because of reduced irrigation supplies resulting from last year's drought. Sorghum and maize outputs were just about half of the previous year's level at some 1.4 million tonnes, while the paddy crop was down 70 percent at a near-record low of just 391 000 tonnes.

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>32 723.2</b>	<b>1 912.9</b>	<b>34 636.1</b>	<b>35 030.9</b>	<b>27 022.8</b>	<b>3 262.3</b>	<b>23 760.5</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>15 989.4</b>	<b>15.4</b>	<b>15 974.0</b>
Egypt	July/June	12 238.5	34.3	12 272.8	11 820.0	11 820.4	11.0	11 809.4
Morocco	July/June	4 592.3	8.5	4 600.8	4 166.0	4 169.0	4.4	4 164.6
<b>Eastern Africa</b>		<b>3 608.7</b>	<b>894.7</b>	<b>4 503.4</b>	<b>5 420.0</b>	<b>4 155.2</b>	<b>2 051.1</b>	<b>2 104.1</b>
Burundi	Jan./Dec.	42.6	22.4	65.0	70.0	45.4	45.4	0.0
Comoros	Jan./Dec.	46.0	0.0	46.0	46.0	9.7	0.0	9.7
Djibouti	Jan./Dec.	58.2	19.7	77.9	63.0	10.7	4.8	5.9
Eritrea	Jan./Dec.	67.9	159.5	227.4	440.0	239.2	185.5	53.7
Ethiopia	Jan./Dec.	144.3	245.7	390.0	1 470.0	1 428.5	1 419.4	9.1
Kenya	Oct./Sept.	1 162.8	123.6	1 286.4	1 110.0	1 110.0	83.5	1 026.5
Rwanda	Jan./Dec.	181.5	44.5	226.0	226.0	29.1	16.4	12.7
Somalia	Aug./July	244.6	25.4	270.0	320.0	320.0	15.7	304.3
Sudan	Nov./Oct.	1 147.8	80.9	1 228.7	1 120.0	445.1	143.7	301.4
Tanzania	June/May	382.3	117.7	500.0	410.0	410.0	40.1	369.9
Uganda	Jan./Dec.	130.7	55.3	186.0	145.0	107.5	96.6	10.9
<b>Southern Africa</b>		<b>1 913.0</b>	<b>422.0</b>	<b>2 335.0</b>	<b>3 237.0</b>	<b>3 239.1</b>	<b>781.6</b>	<b>2 457.5</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	233.7	41.7	192.0
Madagascar	April/March	364.4	29.3	393.7	255.0	251.0	46.1	204.9
Malawi	April/March	144.3	12.6	156.9	550.0	673.8	223.7	450.1
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>9 495.4</b>	<b>3 333.0</b>	<b>351.8</b>	<b>2 981.2</b>
<b>Coastal Countries</b>		<b>6 949.5</b>	<b>265.2</b>	<b>7 214.7</b>	<b>6 867.0</b>	<b>2 471.8</b>	<b>151.1</b>	<b>2 320.7</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	832.7	8.3	824.4
Ghana	Jan./Dec.	462.2	79.9	542.1	462.0	319.9	55.3	264.6
Guinea	Jan./Dec.	331.7	37.1	368.8	370.0	27.6	16.1	11.5
Liberia	Jan./Dec.	116.5	33.5	150.0	165.0	30.9	24.1	6.8
Nigeria	Jan./Dec.	4 297.5	12.5	4 310.0	4 170.0	1 108.3	0.0	1 108.3
Sierra Leone	Jan./Dec.	242.6	69.2	311.8	308.0	39.5	31.1	8.4
Togo	Jan./Dec.	100.0	0.0	100.0	100.0	41.8	8.0	33.8
<b>Sahelian Countries</b>		<b>2 640.8</b>	<b>194.0</b>	<b>2 834.8</b>	<b>2 628.4</b>	<b>861.2</b>	<b>200.7</b>	<b>660.5</b>
Burkina faso	Nov./Oct.	227.2	32.2	259.4	236.5	23.2	20.6	2.6
Cape Verde	Nov./Oct.	37.4	36.2	73.6	108.5	65.9	57.1	8.8
Chad	Nov./Oct.	84.1	6.4	90.5	98.1	17.3	15.2	2.1
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	10.3	7.2	3.1
Mauritania	Nov./Oct.	261.6	45.2	306.8	308.0	84.0	36.6	47.4
Niger	Nov./Oct.	356.2	34.7	390.9	377.0	61.5	11.5	50.0
Senegal	Nov./Oct.	1 244.6	17.4	1 262.0	1 005.5	554.5	41.9	512.6
<b>Central Africa</b>		<b>780.4</b>	<b>94.2</b>	<b>874.6</b>	<b>892.5</b>	<b>306.1</b>	<b>62.4</b>	<b>243.7</b>
Cameroon	Jan./Dec.	365.2	2.2	367.4	367.5	131.6	24.5	107.1
Cent.Afr.Rep.	Jan./Dec.	31.5	4.5	36.0	38.0	3.1	1.6	1.5
Congo, Dem.Rep.	Jan./Dec.	184.4	68.6	253.0	270.0	32.1	30.2	1.9
Congo, Rep.	Jan./Dec.	177.7	13.5	191.2	190.0	137.3	5.6	131.7
Eq. Guinea	Jan./Dec.	15.0	0.0	15.0	15.0	1.5	0.0	1.5
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>36 798.0</b>	<b>3 773.9</b>	<b>40 571.9</b>	<b>41 142.5</b>	<b>38 612.6</b>	<b>3 720.4</b>	<b>34 892.2</b>
Afghanistan	July/June	1 168.9	336.9	1 505.8	1 045.0	1 045.2	393.8	651.4
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	25.0	685.0
Bangladesh	July/June	1 825.5	534.5	2 360.0	2 477.0	2 558.8	358.3	2 200.5
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	9 300.0	9 300.0	85.0	9 215.0
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	6 498.0	223.0	6 721.0	9 304.0	9 304.0	218.7	9 085.3
Iraq	July/June	4 326.1	3.9	4 330.0	3 590.0	3 590.0	819.9	2 770.1
Korea, D.P.R.	Nov./Oct.	451.0	1 104.9	1 555.9	1 359.0	1 145.0	1 044.0	101.0
Kyrgyz Republic	July/June	196.0	89.0	285.0	161.0	135.0	7.0	128.0
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	238.0	0.0	238.0
Nepal	July/June	99.0	6.0	105.0	100.0	100.0	0.7	99.3
Pakistan	May/April	228.4	178.7	407.1	380.0	380.5	55.1	325.4
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	366.3	23.5	342.8
Syria	July/June	1 434.4	12.7	1 447.1	1 917.5	1 917.5	6.6	1 910.9
Tajikistan	July/June	440.0	202.0	642.0	486.0	577.0	140.0	437.0
Turkmenistan	July/June	46.0	8.0	54.0	58.0	60.0	0.0	60.0
Uzbekistan	July/June	521.0	49.0	570.0	320.0	374.0	118.0	256.0
Yemen	Jan./Dec.	2 389.4	112.6	2 502.0	2 435.0	798.1	126.2	671.9
<b>CENTRAL AMERICA</b>		<b>2 933.9</b>	<b>210.9</b>	<b>3 144.8</b>	<b>3 275.0</b>	<b>3 274.9</b>	<b>227.2</b>	<b>3 047.7</b>
Cuba	July/June	1 711.4	25.4	1 736.8	1 775.0	1 775.0	1.2	1 773.8
Haiti	July/June	456.8	94.0	550.8	625.0	625.0	143.8	481.2
Honduras	July/June	523.3	33.3	556.6	602.0	602.0	25.7	576.3
Nicaragua	July/June	242.4	58.2	300.6	273.0	272.9	56.5	216.4
<b>SOUTH AMERICA</b>		<b>726.9</b>	<b>69.4</b>	<b>796.3</b>	<b>860.0</b>	<b>860.0</b>	<b>74.9</b>	<b>785.1</b>
Ecuador	July/June	726.9	69.4	796.3	860.0	860.0	74.9	785.1
<b>OCEANIA</b>		<b>420.0</b>	<b>0.0</b>	<b>420.0</b>	<b>401.0</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.	19.0	0.0	19.0	19.0	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>1 532.2</b>	<b>144.8</b>	<b>1 677.0</b>	<b>1 619.0</b>	<b>1 619.0</b>	<b>111.6</b>	<b>1 507.4</b>
Albania	July/June	323.7	39.3	363.0	383.0	383.0	27.2	355.8
Belarus	July/June	577.0	0.0	577.0	579.0	579.0	0.0	579.0
Bosnia-Herzegovina	July/June	375.4	104.6	480.0	400.0	400.0	84.4	315.6
Macedonia, FYR	July/June	256.1	0.9	257.0	257.0	257.0	0.0	257.0
<b>TOTAL</b>		<b>75 134.2</b>	<b>6 111.9</b>	<b>81 246.1</b>	<b>82 328.4</b>	<b>71 416.5</b>	<b>7 396.4</b>	<b>64 020.1</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.\$ 1 435 in 2001), 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. 3/ Even if is not a LIFD country, has been included for facing large food deficit for 2 consecutive years.

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>21 084.5</b>	<b>1 230.0</b>	<b>22 314.5</b>	<b>20 405.0</b>	<b>1 722.3</b>	<b>579.0</b>	<b>1 143.3</b>
<b>Northern Africa</b>		<b>15 974.0</b>	<b>15.4</b>	<b>15 989.4</b>	<b>14 353.0</b>	<b>681.1</b>	<b>5.5</b>	<b>675.6</b>
Egypt	July/June	11 809.4	11.0	11 820.4	11 900.0	648.4	5.5	642.9
Morocco	July/June	4 164.6	4.4	4 169.0	2 453.0	32.7	0.0	32.7
<b>Eastern Africa</b>		<b>1 700.7</b>	<b>139.3</b>	<b>1 840.0</b>	<b>2 350.0</b>	<b>82.6</b>	<b>82.6</b>	<b>0.0</b>
Kenya	Oct./Sept.	1 026.5	83.5	1 110.0	1 610.0	38.1	38.1	0.0
Somalia	Aug./July	304.3	15.7	320.0	310.0	16.2	16.2	0.0
Tanzania	June/May	369.9	40.1	410.0	430.0	28.3	28.3	0.0
<b>Southern Africa</b>		<b>3 409.8</b>	<b>1 075.3</b>	<b>4 485.1</b>	<b>3 702.0</b>	<b>958.6</b>	<b>490.9</b>	<b>467.7</b>
Angola	April/March	566.6	223.9	790.5	709.0	173.2	134.4	38.8
Lesotho	April/March	192.0	41.7	233.7	321.0	62.9	11.8	51.1
Madagascar	April/March	204.9	46.1	251.0	383.0	83.4	35.7	47.7
Malawi	April/March	450.1	223.7	673.8	64.0	2.8	2.3	0.5
Mozambique	April/March	655.5	94.7	750.2	744.0	230.8	129.8	101.0
Swaziland	May/April	92.1	12.8	104.9	128.0	38.9	10.3	28.6
Zambia	May/April	296.3	138.7	435.0	66.0	28.7	12.0	16.7
Zimbabwe 3/	April/March	952.3	293.7	1 246.0	1 287.0	337.9	154.6	183.3
<b>ASIA</b>		<b>33 775.2</b>	<b>2 511.8</b>	<b>36 287.0</b>	<b>36 548.0</b>	<b>3 461.1</b>	<b>1 543.2</b>	<b>1 917.9</b>
Afghanistan	July/June	651.4	393.8	1 045.2	392.0	23.5	23.5	0.0
Armenia	July/June	123.0	29.0	152.0	211.0	25.8	25.8	0.0
Azerbaijan	July/June	685.0	25.0	710.0	644.0	14.1	5.8	8.3
Bangladesh	July/June	2 200.5	358.3	2 558.8	2 325.0	24.5	24.5	0.0
Bhutan	July/June	67.9	3.1	71.0	59.0	0.0	0.0	0.0
China 2/	July/June	9 215.0	85.0	9 300.0	10 800.0	570.6	21.8	548.8
Georgia	July/June	476.0	18.0	494.0	580.0	77.6	59.8	17.8
India	April/March	214.6	165.4	380.0	300.0	195.0	194.9	0.1
Indonesia	April/March	9 085.3	218.7	9 304.0	8 940.0	1 104.9	167.9	937.0
Iraq	July/June	2 770.1	819.9	3 590.0	3 444.0	774.8	774.8	0.0
Kyrgyz Republic	July/June	128.0	7.0	135.0	187.0	0.0	0.0	0.0
Mongolia	Oct./Sept.	238.0	0.0	238.0	248.0	24.5	24.5	0.0
Nepal	July/June	99.3	0.7	100.0	100.0	0.0	0.0	0.0
Pakistan	May/April	325.4	55.1	380.5	2 000.0	0.1	0.1	0.0
Philippines	July/June	4 831.8	68.2	4 900.0	4 600.0	410.5	114.0	296.5
Syria	July/June	1 910.9	6.6	1 917.5	950.0	109.4	0.0	109.4
Tajikistan	July/June	437.0	140.0	577.0	336.0	23.7	23.7	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	82.1	82.1	0.0
<b>CENTRAL AMERICA</b>		<b>3 047.7</b>	<b>227.2</b>	<b>3 274.9</b>	<b>3 290.0</b>	<b>381.2</b>	<b>115.7</b>	<b>265.5</b>
Cuba	July/June	1 773.8	1.2	1 775.0	1 830.0	100.3	0.0	100.3
Haiti	July/June	481.2	143.8	625.0	590.0	89.1	44.3	44.8
Honduras	July/June	576.3	25.7	602.0	630.0	118.7	45.8	72.9
Nicaragua	July/June	216.4	56.5	272.9	240.0	73.1	25.6	47.5
<b>SOUTH AMERICA</b>		<b>785.1</b>	<b>74.9</b>	<b>860.0</b>	<b>875.0</b>	<b>20.6</b>	<b>5.3</b>	<b>15.3</b>
Ecuador	July/June	785.1	74.9	860.0	875.0	20.6	5.3	15.3
<b>EUROPE</b>		<b>1 507.4</b>	<b>111.6</b>	<b>1 619.0</b>	<b>1 719.0</b>	<b>2.9</b>	<b>2.9</b>	<b>0.0</b>
Albania	July/June	355.8	27.2	383.0	384.0	2.9	2.9	0.0
Belarus	July/June	579.0	0.0	579.0	568.0	0.0	0.0	0.0
Bosnia-Herzegovina	July/June	315.6	84.4	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>60 199.9</b>	<b>4 155.5</b>	<b>64 355.4</b>	<b>62 837.0</b>	<b>5 588.1</b>	<b>2 246.1</b>	<b>3 342.0</b>

SOURCE: FAO

for footnotes, see previous page.

<b>C O N T E N T S</b> .....	<b>page</b>
Affected countries .....	2
Crop and food supply situation .....	3
Country reports .....	6
Northern Africa .....	6
Western Africa .....	7
Central Africa .....	11
Eastern Africa .....	13
Southern Africa .....	17
Asia .....	20
Central America .....	29
South America .....	31
Europe .....	33
North America .....	38
Oceania .....	38
 Summary tables	
a) Estimates for 2002/2003 or 2003 .....	39
b) Estimates for 2003/04 .....	41

#### **DEFINITIONS**

**Purchase and distribution of localized or exportable surpluses, requiring external assistance:** This expression refers to a situation of exceptional surplus in a particular area of a country, which needs to be transported to deficit areas in the same country or the neighbouring countries, and for which purpose external assistance is required.

**Shortfalls in food supplies in current marketing year, requiring exceptional external assistance:** This expression is used for 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, 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.

**Unfavourable prospects for current crops:** This expression means that a shortfall in production of current crops is being predicted as a result of reductions in area planted and/or adverse weather conditions, plant pests, diseases and other calamities. The situation indicates a need for close monitoring of the crops for the remainder of the growing season.

**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.

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