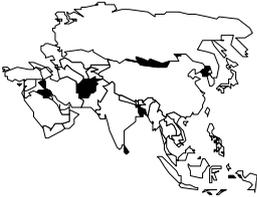


FOODCROPS AND SHORTAGES

No. 1

February 2005

	<p>AFRICA: In eastern Africa, the food situation in Eritrea is of serious concern. Successive years of inadequate rains have seriously undermined crop and livestock production. A below average harvest is also estimated for Sudan due to conflict and drought. By contrast, the food situation in Ethiopia has improved as a result of a good harvest. Kenya's poor second season maize crop will exacerbate food shortages in parts, while Somalia's good secondary "deyr" harvest will improve food supplies in main agricultural areas. In southern Africa, prospects for 2005 main season crops are mixed owing to delayed, erratic and generally below normal rainfall during the first half of the season. The food security situation for vulnerable populations, particularly in Zimbabwe, Lesotho and Swaziland is precarious during the current lean months. In western Africa, the food situation remains critical in Mauritania, while in Côte d'Ivoire insecurity continues to disrupt agricultural and marketing activities.</p>
	<p>ASI/NEAR EAST: In the Asian CIS and Afghanistan prospects are for a good harvest this year, owing mainly to favourable weather conditions. In Iraq, weather conditions are favourable for the development of winter crops. The recent earthquake and tsunami in the Indian Ocean caused a large number of deaths and destroyed livelihoods of millions of people in several countries. The worst affected include Indonesia, Sri Lanka, Maldives, India and Thailand. More than 1.3 million people have received food assistance; relief operations have entered the recovery and reconstruction phase. In Korea DPR, despite a recovery in food production the country still needs international assistance to meet its minimum food needs.</p>
	<p>LATIN AMERICA AND THE CARIBBEAN: In Central America, first and second season maize and bean crops have been damaged by dry weather conditions and food assistance is being provided to the affected families. In Guyana, torrential rains have caused severe flooding and river overflow. Food assistance continues to be provided in Haiti to families affected by recent floods and droughts. In South America, overall prospects for wheat, maize and paddy crops are favourable, except in Ecuador and Peru where production of maize and rice may be affected by dry weather at sowing.</p>
	<p>EUROPE: A reduction in cereal production is expected in the EU in 2005 after the bumper crop last year, reflecting an increase in the set-aside requirement, which will force down the area sown and the likelihood that yields will fall back from last year's highs. A reduction in output is also in prospect in the Balkan countries where yields are not expected to match last year's exceptionally good levels. In the European CIS protective snow cover is seen to reduce winterkill and prospects are for a good harvest throughout the region.</p>
	<p>NORTH AMERICA: Despite generally favourable weather conditions so far this winter, latest information points to a reduced wheat output in 2005 in the United States, as the area sown to the main winter crop has been reduced by 4 percent compared to the previous year. The main 2005 crops in Canada have still to be sown but early indications point to a possible decrease in output this year due to reduced plantings and expected yields.</p>
	<p>OCEANIA: Australia's 2004 cereal output remained about average but well down on the previous year's record after several major producing areas were struck by drought conditions. Early prospects for the 2005 summer coarse grain crop are very favourable reflecting timely planting rains in the main producing areas.</p>



AFFECTED COUNTRIES ^{1/}

COUNTRIES REQUIRING EXTERNAL FOOD ASSISTANCE (total: 36 countries)

<u>Region/Country</u>	<u>Reason for emergency</u>	<u>Region/Country</u>	<u>Reason for emergency</u>
<u>AFRICA</u> (23 countries)		<u>ASIA/NEAR EAST</u> (7 countries)	
Angola*	Returnees	Afghanistan*	Drought and civil strife
Burundi*	Civil strife, IDPs and returnees	Bangladesh	Floods
Chad	Refugees	Iraq*	Recent war, shortage of inputs
Central Afr. Rep.	Civil strife	Korea, DPR*	Economic constraints
Congo, Dem.Rep.*	Civil strife, IDPs and refugees	Maldives	Tsunami
Congo Rep. of	Civil strife, IDPs	Mongolia*	Summer drought and harsh winters
Côte d'Ivoire	Civil strife, IDPs	Sri Lanka*	Tsunami and drought
Eritrea*	Drought, IDPs, returnees		
Ethiopia*	Drought in parts, IDPs	<u>LATIN AMERICA</u> (5 countries)	
Guinea*	IDPs and refugees	Guatemala*	Drought and economic shocks
Kenya*	Drought in parts	Guyana	Flooding
Lesotho*	Drought	Haiti*	Civil strife, flooding and drought
Liberia*	Civil strife, IDPs	Honduras*	Drought and economic shocks
Madagascar*	Drought in southern parts, cyclones	Nicaragua*	Drought and economic shocks
Mauritania*	Drought, locusts		
Malawi*	Drought in parts	<u>EUROPE</u> (1 country)	
Sierra Leone*	Returnees	Russian Federation (Chechnya)	Civil strife
Somalia*	Civil strife, drought in parts		
Sudan*	Civil strife, drought in parts		
Swaziland*	Drought in parts		
Tanzania, U.R.	Drought in parts, refugees		
Uganda*	Civil strife, IDPs		
Zimbabwe*	Adverse weather, economic crisis		

COUNTRIES WITH UNFAVOURABLE PROSPECTS FOR CURRENT CROPS

<u>Country</u>	<u>Main contributing factor</u>	<u>Country</u>	<u>Main contributing factor</u>
Angola*	Adverse weather, returnees	Malawi*	Drought
Botswana	Adverse weather	Maldives	Tsunami
Cuba*	Drought	Peru	Drought
Ecuador	Drought	Swaziland*	Drought
Kenya*	Erratic rainfall	Zimbabwe*	Economic crisis
Lesotho*	Drought		

PURCHASE AND DISTRIBUTION OF LOCALIZED OR EXPORTABLE SURPLUSES REQUIRING EXTERNAL ASSISTANCE

Ethiopia

^{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.

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

Please note that the country reports – as updated between publications of the print version – are available from the GIEWS website: <http://www.fao.org/giews/> in the GIEWS Workstation.

CROP AND FOOD SUPPLY SITUATION

OVERVIEW

As of February 2005, the number of countries facing serious food shortages throughout the world stands at 36 with 23 in Africa, 7 in Asia/Near East, 5 in Latin America and 1 in Europe. The causes are varied but civil strife and adverse weather predominate. A recent outbreak of desert locusts in western Africa and the tsunami disaster in south Asia have had serious though localized food security consequences. In many of these countries, the HIV/AIDS pandemic is a major contributing factor. Recently published assessment reports highlighting these factors in greater detail can be found at:

<http://www.fao.org/giews/english/alertes/sptoc.htm>

In **eastern Africa**, harvesting of the 2004/05 secondary cereal crops is almost complete in most countries, except in Ethiopia where planting is about to commence. The outlook is poor in Kenya mainly due to inadequate rainfall. In Somalia, the recent good secondary season "deyr" rains are expected to improve the food situation, though it remains critical for pastoralists in northern Somalia.

The food security situation in Eritrea is particularly alarming following a well below average cereal harvest in 2004. The consumer price index, which has been persistently high over the past few years, is increasing rapidly. Food prices are now beyond the reach of most vulnerable people. In Sudan, the continued crisis in Greater Darfur, where fighting has forced more than 2 million people from their homes and farms, is another huge humanitarian challenge. Reports paint a grim picture where the conflict has engulfed almost all parts of Greater Darfur, making agricultural activities and humanitarian assistance very difficult to carry out.

Overall, the food security situation of a large number of people in the subregion is highly precarious. Recent estimates indicate that about 2.3 million people in Eritrea, 2.2 million in Ethiopia, 3.6 million in Sudan, 2 million in Uganda, 1.4 million in Kenya, and 0.5 million in Somalia will need emergency food assistance in 2005.

In **southern Africa**, the 2005 agricultural season for the main cereal crops is approaching mid-point. Generally, the season so far has been characterized as uneven with below normal rainfall in Botswana, Lesotho, Swaziland and parts of Zambia and Zimbabwe and normal to above normal elsewhere. The outlook for the second half (February-April) foresees below normal precipitation across Namibia, western Botswana, south-western Zambia, western Zimbabwe, and southern Mozambique and above normal rainfall over Angola, north-eastern Zambia, and northern and central Mozambique. Reduced cereal harvests in 2004 in Lesotho, Swaziland, Zimbabwe and Malawi have caused food shortages in these countries with varying degrees of severity. The overall reduction in cereal harvest for the subregion in 2004 is expected to result in an increased net coarse grain import requirement of about 2 million tonnes for the 2004/05 marketing year. WFP has launched a three-year regional Protracted Relief and Recovery Operation (PRRO) requiring US\$405 million and involving 656 573 tonnes of food commodities to assist food insecure and AIDS affected populations in the subregion.

In **the Great Lakes region**, harvesting of the main season (2005A) crops, maize, sorghum and beans, planted in September-October, is currently underway. After a sporadic start of the season, heavy rains were experienced in December and January. Reports on joint FAO/WFP/UNICEF/Ministry of Agriculture assessments in Burundi and Rwanda are currently being prepared. In Burundi this season, FAO distributed sweet potato cuttings to 7 500 vulnerable farmers and sorghum seeds to 75 400 households to help the process of farm resettlement. However, resettlement of returning refugees and the food security situation in the Great Lakes region continue to be hampered by sporadic disturbances.

In **northern Africa**, sowing of the 2004/05 winter cereals to be harvested from April is complete. Normal to abundant rains were received in January for most of the region and the condition of the crops is reported as generally favourable in Algeria, Egypt, Morocco and Tunisia. Production of cereals in the subregion last year is estimated at 36.4 million tonnes, similar to the previous year's record crop.

In **western Africa**, a combination of desert locust attacks and drought seriously undermined the food security of million of people in the Sahel, notably in Mauritania, Senegal, Mali, Niger, Cape Verde, Burkina Faso and Chad. In Mauritania, the most affected country, 2004 aggregate cereal production is estimated to drop by 44 percent compared to previous year. Pastoral and agro-pastoral groups have been especially hard hit in most countries. Although overall agricultural production in the nine CILSS countries is estimated to be close to the

five-year average, high millet prices are reported in most affected zones, which will compound the impact on affected communities as millet is their most important staple. In Côte d'Ivoire, food security for many households continues to be hampered by disruption of livelihoods, due to the on-going conflict, while Liberia, Sierra Leone and Guinea remain heavily dependant on international assistance due to large numbers of IDPs and refugees.

In **Asia**, the earthquake and tsunami of 26 December 2004 in the Indian Ocean killed over three hundred thousand people and destroyed livelihoods of millions of others along the coasts and among the islands in South and Southeast Asia. The disaster killed more than 285 000 people, made an estimated 5 million homeless, resulted in massive displacement of populations and caused extensive damage to housing and infrastructure. The worst affected countries include Indonesia, Sri Lanka, Maldives, India and Thailand. Myanmar, Malaysia and Bangladesh were also affected, but with relatively limited damage. Preliminary estimates indicate overall damage and loss worth US\$4.45 billion in Indonesia, US\$1 billion in Sri Lanka, US\$359-500 million in Maldives, and US\$1.5 billion in India. Smaller countries such as Sri Lanka and the Maldives are likely to suffer relatively heavier economic consequences.

The majority of the people affected by the earthquake and the tsunami had agriculture- and fisheries-based livelihoods or were employed in associated enterprises. The fisheries sector is hit the hardest, but localized severe crop and livestock losses were also suffered. In the fisheries sector, the damage has been assessed by FAO at US\$25 million in Maldives; about 65-70 percent of the small scale fishing fleet and associated gear was destroyed and some 50 percent of fishers died in Aceh Province of Indonesia; some 66 percent of the fishing fleet and industrial infrastructure in coastal regions have been destroyed and 10 out of 12 main fishery harbours devastated in Sri Lanka; and some 5 400 fishing boats were damaged in Thailand. In the agriculture sector, preliminary assessments indicate that about 40 000 hectares of irrigated lands have been devastated in Indonesia, a total of 5 500 hectares have been damaged in Sri Lanka, some 1 300 hectares of land were inundated by sea water in Thailand and about 30 percent of the field plots have been completely destroyed in Maldives.

It is estimated that 2 million people in different countries in the disaster region are in need of emergency food assistance, mostly in Indonesia, Sri Lanka, Maldives, and Myanmar. WFP plans to distribute 169 000 tonnes of food aid to the most needy population over a period of six months. So far, over 21 000 tonnes of food have been distributed to 1.345 million beneficiaries since the advent of the disaster. FAO has appealed for US\$26.5 million to finance emergency rehabilitation projects to assist farmers and fisher folk hit by the tsunami, and another US\$2.1 million for projects in partnership with UNDP and UNEP. The total funding available to FAO for recovery and reconstruction in agriculture and fisheries sectors may reach US\$67 million.

Even in cases where national food supply and food security impacts are limited, local communities will experience severe food security problems in the short and long-term because parents and relatives have been lost, livelihood assets have been destroyed, and previous sources of income no longer exist. At the farm level, losses of rice stocks are also likely to be important. Salt water may prevent farmers from cropping for one or more seasons or force them adopt more salt tolerant crops and varieties with low productivity. It will require huge investments for a long time to restore destroyed/damaged storage, processing, irrigation flood control and coastal protection infrastructure in the affected areas.

Despite a recovery in food production in 2004, Korea DPR will still depend on international assistance to meet its minimum food needs in 2005. Mongolia has experienced another severe winter after last summer's drought.

In Afghanistan heavy snowfall and rains may have partially replenished the receding water tables and provided sufficient irrigation water for the drought-stricken country. Prospects are for a good harvest this year following last year's partial crop failure.

In the **Asian CIS**, winter cereals are reported to be in satisfactory condition. Prospects are for a good harvest provided that favourable weather conditions prevail in spring and early summer. Last year the region harvested an aggregate of 26.4 million tonnes of cereals, which is hoped to be topped by this year's harvest.

In the **Near East**, recent precipitation and snow cover in most countries have improved prospects for winter grains for harvest from May 2005. In Iraq, according to a study conducted by the Ministry of Health, acute malnutrition among children under 5 increased to 7.7 percent this year compared to 4 percent two years ago.

In **Central America and the Caribbean**, harvesting of the 2004/05 second and third 'apante' season coarse grains and bean crops is about to be completed. Despite some losses due to prolonged drought periods in Honduras, Nicaragua, Guatemala and Cuba, aggregate cereal output in 2004 is estimated at a record 39.2 million tonnes. This result is mainly due to the excellent maize production in Mexico, following good weather conditions and record plantings in Sinaloa state as a consequence of the government support programme for white maize. In Haiti, the security situation continues to be uncertain and volatile due to the civil strife that often hampers the delivery of food aid to families hit by floods and droughts in 2004.

In **South America**, harvesting of 2004 winter wheat has been completed in the southern areas of the subregion. Aggregate wheat output in 2004 is estimated to be a record with more than 25 million tonnes as a consequence of the bumper crop obtained in Argentina and the good results in Brazil, Chile and Uruguay. In Brazil, Chile and Uruguay, dry weather conditions are affecting 2005 first season maize crop, to be harvested from March. In the Andean countries, dry weather in coastal areas of Ecuador and Peru are delaying planting activities of first season cereals and the possibility of the negative experience of last year's drought may seriously affect farmers' planting intentions. In Colombia and Venezuela, harvesting of the maize crop has been virtually completed and above-average outputs are expected. In Guyana, a state of emergency has been declared due to torrential rains that caused floods and river overflow along the East Coast and the metropolitan area of Georgetown.

In **Europe**, weather conditions for the over-wintering cereal crops throughout the region have been generally favourable so far, with the main exception of southern Spain and Portugal, where adverse dry conditions prevail. A reduction in cereal production is expected in the EU in 2005 after the bumper harvest last year. The overall cereal area is expected to decrease slightly following the re-introduction of a 10-percent set-aside requirement for 2005, compared to just 5 percent in 2004, and yields are expected to return to average after bumper levels in 2004. In the Balkan countries, despite indications that the 2005 cereal area may increase, outputs are quite likely to fall somewhat in 2005 on the assumption that yields in these countries will also return to normal after bumper levels last year.

In the **European CIS**, heavy and protective snow cover, as well as average temperatures, are seen to significantly reduce winterkill, which usually affects 3 to 5 million hectares of winter cereals in the region. More than 22.8 million hectares have been planted with winter cereals compared with just over 19 million hectares in 2004. Winter cereals, mainly wheat, barley and some rye, are reportedly in satisfactory condition throughout the region and a repeat of last year's good harvest is a real possibility. Last year, aggregate cereal harvest in the region was estimated at more than 124 million tonnes, including 64.7 million tonnes of wheat and 59 million tonnes of coarse grains.

In **North America**, conditions have been generally favourable for the United States' winter wheat crops so far but a reduced output is in prospect following a 4 percent reduction in area. With no change expected in the spring wheat planting later this year the aggregate wheat output will be down in 2005. In Canada, the grain crops are mostly sown in May/June. Early tentative forecasts point to a decrease in the aggregate cereal production in 2005, which would result from an anticipated reduction in area and lower yields after exceptionally good levels last year.

In **Oceania**, dry conditions and extremely hot temperatures in several parts of Australia took their toll on Australian cereal production in 2004 after what had been a promising start to the season at planting time. The wheat crop fell about 20 percent from the previous year's record level to 20.4 million tonnes, but remained close to the five-year average. Despite the lack of rainfall for the growing stages of 2004 winter crop season, the main summer coarse grain crop zones benefited from timely planting rains. The combined sorghum and maize area for harvest in 2005 is estimated to have risen by about 24 percent.

COUNTRY REPORTS

AFRICA

NORTHERN AFRICA

ALGERIA (3 February)

Planting of the winter cereals for harvesting from June 2005 is almost completed. Early prospects are good provided normal weather conditions persist.

Aggregate 2004 cereal output has been estimated at 3.95 million tonnes, which is similar to the bumper crop harvested in 2003 and 75 percent above average. This is the result of overall favourable weather conditions, larger area sown and adequate availability of agricultural inputs, as well as the implementation of the Agricultural Development Plan set up by the Government in 2000. As a consequence, imports of cereals, mostly wheat, are forecast to decrease to about 5.5 million tonnes.

EGYPT (3 February)

Planting of the 2005 wheat and barley crops has been completed under normal weather conditions, while land is being prepared for maize and paddy planting from April. The area planted to wheat has been provisionally estimated at about 1.249 million hectares, higher than 2004 level.

Aggregate cereal production in 2004 was 21.39 million tonnes, which compares to 20.65 million tonnes in 2003 and the average of 19.88 million tonnes in the past five years. The output of the mainly irrigated wheat crop is estimated at 7.18 million tonnes, up 5 percent on the above average production of 2003. Barley output is estimated to have increased to 163 000 tonnes compared to the good crop harvested the previous year, driven mainly by a significant expansion in the area sown.

Wheat imports in marketing year 2004/05 (July/June) are expected to increase by some 4 percent to 7.2 million tonnes. Imports of maize, mostly used as animal feed, are forecast at about 4.8 million tonnes, about 100 000 tonnes more than the previous year.

MOROCCO (6 February)

Normal to above-normal rains since December are reported for most of the growing areas, with the exception of some parts in the south and the west of the country. Planting of the winter cereals has been completed for harvesting from May. The number of swarms of desert locusts have reportedly decreased significantly across the country due to intensive control operations and unusually cold temperatures in January. Above-average plantings of wheat and barley are provisionally estimated. Crops are developing satisfactorily and prospects are generally favourable, notably in the important grain-producing area of central Morocco. Early forecasts point to satisfactory outputs in 2005, but lower than in 2004 when aggregate cereal production was over 78 percent above the past five-year average.

Reflecting two consecutive years of bumper harvests, imports of cereals in the marketing year 2004/05 (July/June) are forecast to decline to about 3.1 million tonnes.

TUNISIA (6 February)

Sowing of the wheat and barley crops has been recently completed under generally favourable weather conditions. Crops are developing satisfactorily and the prospects for the 2005 winter crops to be harvested from May are favourable so far. Barring adverse weather for the rest of the growing season, output of wheat and barley in 2005 is forecast at 1.35 million tonnes and 0.42 million

tonnes, respectively. These levels of production are lower than the record outputs of 1.72 million tonnes for wheat and 0.62 million tonnes for barley estimated for 2004, but remain above the average for the previous five years.

Imports of cereals in 2004/05 (July/June), mostly wheat and maize are forecast at 1.8 million tonnes, about 232 000 tonnes more than in the previous year.

WESTERN AFRICA

BENIN (8 February)

Seasonably dry conditions prevail. Land preparation for the first maize crop is underway in the South. Plantings will start with the arrival of rains, usually in March. Aggregate cereal production in 2004 has been estimated at a record 1.6 million tonnes, some 60 percent above average.

Reflecting the 2004 bumper harvest, imports of cereals in the marketing year 2005 are forecast to decline to about 148 000 tonnes. The country is being affected by Nigeria's increasingly protectionist policy and the tightening of controls against re-export trade. Economic growth slowed down in 2004 and households' income and access to food is negatively affected.

BURKINA FASO (8 February)

Aggregate cereal output in 2004 has been provisionally estimated by a joint FAO/CILSS Crop and Food Supply Assessment Mission at 3.06 million tonnes, some 14 percent lower than the record crop harvested in 2003 but still above the average for the previous five years. Output of sorghum, the most important cereal crop, decreased by 8 percent to 1.48 million tonnes. Millet and maize declined by 26 percent and 11 percent respectively to 881 000 tonnes and 594 400 tonnes. Output of fonio increased by some 22 percent to some 11 000 tonnes. Dry weather and Desert Locusts infestation have caused severe damage to crops and pastures in the northern areas near the Mali border. Oudalan province was the most affected with crop losses estimated at nearly 100 percent for millet and 80 percent for pastures. In the northern region some 98 villages are reported to be at risk while in the centre-north the decline in production is estimated between 30 percent and 50 percent. Although national food supply was not significantly affected by the fall in production in the north, cereal prices have increased steeply in the localities affected by drought and desert locusts. The Government has organized cereal distribution in affected communities, which helped slow down price increases and improve access to food.

Commercial imports of cereal in the marketing year ending in October 2005 are forecast to increase to about 217 000 tonnes (180 000 tonnes of rice and 37 000 tonnes of wheat). Commercial cereal imports in 2003/04 were estimated at some 140 000 tonnes.

CAPE VERDE (8 February)

Due to a late start of the rainy season which delayed plantings and subsequent erratic precipitation combined with desert locust infestations, the growing conditions for the maize crop, the only cereal grown, have been poor in most islands in 2004. An FAO/CILSS mission estimated the output of the maize crop at some 4 042 tonnes mostly produced on Santiago Island (over 50 percent). This level of production is only one third of last year's output and similar to the poor crops of 1997 and 1998. Production of beans and potatoes will also be below normal. Although the country imports the bulk of its consumption requirement even in good years, the rural population particularly in the semi-arid zones could be severely affected by the production shortfall.

Total imports of cereal in the marketing year ending in October 2005 are forecast to be around 100 000 tonnes. Taking into account an anticipated commercial cereal import of 41 500 tonnes and 28 000 tonnes of food aid pledges, the total uncovered deficit for the year is about 31 000 tonnes.

CHAD (8 February)

A joint FAO/CILSS/FEWSNET mission has provisionally estimated cereal production in 2004/05 at 1.038 million tonnes. At this level, production is about one third lower than last year's good output. Production of sorghum and millet, the most important food crops, is estimated to have declined by 30 percent and 43 percent, respectively, to 0.4 million tonnes and 0.3 million tonnes. The reduction in production was mainly due to inadequate rains in September in some areas of the Sahelian zone. Losses due to Desert Locusts infestation are not significant.

As of late January, the estimated number of Sudanese refugees in eastern Chad was 213 314. WFP has finalized the new phase of EMOP 10327.0 for the period July 2005-December 2006. Some 92 000 tonnes of food are required for a total estimated cost of about US\$82 million.

CÔTE D'IVOIRE (9 February)

Harvesting of the 2004 cereal crops is complete. Production is not expected to recover significantly, in spite of overall favourable weather conditions during the growing season, due to persistent insecurity, conflict-induced population displacement and the prolonged partition of the country that continue to hamper production and marketing activities. The Government recently organised a crop assessment jointly with FAO and WFP, but results are not available yet.

In spite of reduced agricultural production since 2002, the overall food supply position remains adequate and inflation moderate, due mainly to sustained food imports in the government-held south and cross-border trade with Burkina Faso and Mali in the rebels-controlled North. However, food security for many households continues to be hampered by disruption of livelihoods especially in the west. In addition, due to continuous unfavourable market situation, smallholder cash crop producers are experiencing a significant loss of income. Although cotton production in 2004/05 is estimated to have increased to some 400 000 tonnes, compared to 180 000 tonnes in the previous year, due mainly to improved inputs distribution to cotton farmers, there is still uncertainty regarding the marketing of the produce.

GAMBIA, REPUBLIC OF (8 February)

The joint FAO/CILSS Mission in October 2004 provisionally estimated cereal production in 2004 at a record of about 239 000 tonnes, an increase of about 12 percent over the previous year's good crop and significantly above the average for the previous five years. Although grasshopper, blister beetles and striga infestations have been reported in several areas, overall damage to crops has been limited. In spite of the recent desert locust invasion, the food position this year is expected to be satisfactory, reflecting the bumper harvest, including a good groundnut output. With the arrival of new harvests on the markets the price of coarse grains has declined. Prices of maize, millet and sorghum have decreased by 22 percent, 25 percent and 28 percent, respectively, compared with the same period in the previous year.

GHANA (9 February)

Seasonably dry conditions prevail. The aggregate output of cereals in 2004 is provisionally estimated at 1 930 000 tonnes, which is slightly below 2003 and close to the five-year average. Cocoa production in 2004/05 is not expected to reach the record level of 2003/04, due to less favourable weather conditions. However, the relatively high cocoa price on the international market should benefit the estimated 1.6 million peasant farmers who produce most of the country's cocoa.

The crises in Côte d'Ivoire and Liberia have resulted in an influx of third country nationals in transit through Ghana to their home countries, Ivorians and Liberians seeking asylum and the return of Ghanaian nationals.

GUINEA* (9 February)

Harvesting of the 2004 paddy crop is complete and output is expected to be similar to previous year's crop. The repatriation of Sierra Leonean refugees in Guinea was completed in late July. About 12 170 people have been repatriated in 2004, bringing the number of refugees repatriated since the beginning of the operation in October 2001 to about 56 000. Although the restoration of peace in Sierra Leone has resulted in a decrease of the number of refugees in Guinea, the country still hosts a large number of refugees. According to the results of a refugee verification exercise carried out by WFP in June 2004, 80 806 refugees are still living in the country (including 73 840 from Liberia; some 3 980 from Côte d'Ivoire and over 1 830 from Sierra Leone), in addition to some 80 000 IDPs and over 100 000 returnees from Côte D'Ivoire in 2002 in Guinea Forestière.

GUINEA-BISSAU (8 February)

An FAO/CILSS Crop Assessment Mission has estimated the 2004 aggregate cereal production at some 208 000 tonnes, 71 percent above last year's level. Rice, the main crop, is expected to increase by 91 percent to about 127 000 tonnes. Commercial imports in 2004/05 (November/October) are forecast at 30 000 tonnes of rice and 15 000 tonnes of wheat. With food markets well supplied, prices of cereals are lower than those prevailing in the same period last year.

Guinea-Bissau faced a particularly difficult lean season in 2004 due to a steep rise in rice price in the country, due mainly to a decline in commercial imports caused by an increase in the world price. The low producer price of cashew, the main export of the country, has further limited access to food notably for farmers living in the structurally food deficit regions of Pirada and Pitche in the East, and Biombo and Cacheu in the North. Per caput cereal consumption is forecast to recover significantly in 2004/05 from its previous low level. However, the recent desert locust invasion may affect the production of cashew the main source of income for farmers.

LIBERIA* (9 February)

Harvesting of the 2004 paddy crop is complete. Although insecurity has prevented many farmers from cultivating, agricultural production is expected to recover somewhat from the previous year's very low level reflecting the return of many displaced people following the end of the civil war. Paddy production in 2004/05 is estimated at 159 600 tonnes compared to 110 000 tonnes in 2003/04.

Since 1 October 2004, UNHCR has organized repatriation of over 8 000 out of the 300 000 Liberian refugees scattered across West Africa. The UN disarmament programme has been officially completed on 31 October as planned. By 6 November 2004, a total of over 96 325 ex-combatants had been disarmed and some 85 240 demobilized since December 2003. With the improvement of the security situation, WFP has extended its operation to 10 counties out of the 15 counties in the country. In 2004, WFP distributed a monthly average of 8 000 tonnes to feed 650 000 beneficiaries. Under the current PRRO, WFP estimates that nearly a third of the Liberian population would be food insecure and may require food assistance. Accordingly, WFP plans to feed an average of 750 000 people between January to June 2005. However, the agency is facing a serious shortfall in resources and has been forced, since June, to distribute reduced rations to the approximately 250 000 IDPs receiving its assistance in the country.

Following a steep rise in rice price in the country, due mainly to an increase in the world price, the Government set up a special committee to recommend solutions to bring rice prices down and stabilize the market. Subsidized sales of about 33 000 tonnes of rice donated by China are expected to start in February.

MALI (8 February)

Aggregate 2004 cereal production has been estimated at about 2.99 million tonnes, which is 12 percent lower than the record crop harvested in 2003 but some 8 percent above the average for the previous five years. According to the FAO/WFP/CILSS Crop and Food Supply Assessment Mission that visited the country in 2004, the most significant crop loss due to locusts occurred in millet (37 000 tonnes), cowpeas (3 000 tonnes) and sorghum (9 000 tonnes). Although crop loss is significant in affected areas, good crop production in the most important southern producing areas means that losses are not great at national level. Domestic production should cover most of the country's cereal utilisation requirement, but many farming families will need food assistance as well as seeds and other inputs for off-season agriculture and even for the next main growing season.

MAURITANIA* (8 February)

The food situation remains critical in Mauritania. The Crop and Food Supply Assessment Mission that visited the country recently, estimated 2004 cereal output at some 101 192 tonnes, about 44 percent below last year and 36 percent below the previous five years average. This was the result of drought and widespread desert locust infestations that caused severe damage to crops and pastures across the country. The diéri (rainfed) crops, which normally account for approximately 30 percent of the total national cereal harvest, were seriously damaged by both locusts and drought. Loss of millet, early sorghum and legumes was nearly total in all areas visited by the Mission. The mission estimated that 30 percent of rice crops in the large scale irrigated sector - accounting for more than 90 percent of rice production and 50 percent of national cereal production in recent years - has been devastated by desert locusts but farmers feared far greater losses if the swarms were still present during the grain filling stages. Pastures have been severely affected and early southern movement of livestock herds has already started. The country has already faced several years of drought and poor harvests and the ability of the Mauritians to cope with this situation has been exhausted. Access to food is difficult for thousands of rural households and the situation will get worse if appropriate actions are not taken to assist affected communities. The country could sink back into a food crisis similar to the one it faced in 2002/03.

NIGER (8 February)

An early end of the rains in September 2004 affected cereal crops and pastures and contributed to the movement of Desert Locusts to crop areas. Out of 205 villages in Tahoua region, about 125 have reported crop damage due to locusts. The joint FAO/CILSS/WFP Crop and Food Supply Assessment Mission has provisionally estimated the 2004 cereal production at 3.14 million tonnes, which is 12 percent lower than last year's good crop, but close to the average for the previous five years. However, due to the fall in grain output, some 3.6 million people are estimated to be at risk of food shortage. In 2003 the population at risk was estimated at 1.58 million people. Imports of cereals in the marketing year ending in October 2005 are forecast to increase sharply from last year to over 500 000 tonnes.

NIGERIA (9 February)

Seasonably dry conditions prevail. Land preparation for the first maize crop is underway in the South. Plantings will start with the arrival of rains, usually in March. Aggregate cereal production in 2004 has been estimated at about 22.8 million tonnes, similar to the previous year record crop, reflecting generally favourable growing conditions during the rainy season.

Cereal imports have trended upwards in recent years, due mainly to high urban population growth, changing consumption pattern and inadequate agricultural performance. Consequently, the Government has taken a series of measures to improve agricultural production, including the Special Program for Food Security, jointly implemented with FAO, 25 percent subsidy on fertilizers and zero tariffs on imported agrochemicals, the selection of key sub-sectors for rehabilitation or expansion, the tightening of controls against illegal imports. Moreover, the Government is planning to ban the

importation of rice by 2006. Imports of cereals in 2005, mainly rice and wheat are forecast to decrease to about 3.68 million tonnes.

Communal violence in central and northern Nigeria in May 2004 resulted in the death of hundreds of people and the displacement of at least 50 000 others. Most of the internally displaced persons are living in camps bordering Plateau State and many farmers were reportedly afraid of planting crops in outlying fields. Food security in the region may be affected.

SENEGAL (8 February)

The FAO/CILSS/WFP Crop and Food Supply Assessment Mission estimated the 2004 cereal production at some 1 132 700 tonnes, which is 22 percent lower than last year's record crop of about 1.4 million tonnes, but close to the five-year average. The important millet crop is estimated to decrease by 40 percent to some 379 166 tonnes, while sorghum production is 30 percent down from the previous year. This decline is due to inadequate rainfall combined with severe Desert Locust infestations in several areas in the north and centre, including Matam, Saint-Louis, Thiès, Diourbel and Louga regions. By contrast, production of groundnut, the main cash crop, will be up by 28 percent due to the substitution of millet and sorghum with groundnut by farmers and renewal of several government agricultural programmes including subsidizing maize and groundnut seeds and fertilizers. Moreover, the main groundnut producing areas were spared by both desert locusts and inadequate rainfall.

Millet prices have been increasing steeply since September in affected regions. Although the total cereal import requirement, estimated at 952 000 tonnes (mainly wheat and rice), is anticipated to be covered on commercial basis, millet prices are likely to remain high. In addition to food assistance to the most affected populations, many farming families will need seeds and other inputs for off-season agriculture, and even for the next main growing season. Pastoral and agro-pastoral groups have been especially hard hit. With scarce pasture and water, the early southern movement of livestock herds has already started, which may lead to confrontations. Urgent action is needed to establish safe passage areas for livestock and to vaccinate animals on their way to southern pastures.

SIERRA LEONE* (9 February)

Harvesting of the 2004 paddy crop is complete. Output is expected to further increase this year, reflecting an improved security situation, increased plantings following the return of refugees and farmers previously displaced, as well as improved availabilities of agricultural inputs.

The security situation in the country remains calm. The repatriation of Sierra Leonean refugees in Guinea was completed in late July. About 12 170 people have been repatriated in 2004, bringing the number of refugees repatriated since the beginning of the operation in October 2001 to about 56 000. An estimated 1 million internally displaced people have also been resettled. However, 65 000 Liberian refugees are still living in the country.

Imports of cereals in 2005 are forecast at about 288 000 tonnes, including 35 000 tonnes of food aid.

TOGO (9 February)

Seasonably dry conditions prevail. Land preparation for the first maize crop is underway in the South. Plantings will start with the arrival of rains, usually in March. Aggregate cereal production in 2004 has been estimated at a record 879 700 tonnes, some 18 percent above average. As a consequence, imports of cereals in the marketing year 2005 are forecast to decline to about 165 000 tonnes, including re-exports. However, the current political development may affect the food situation of the country if the uncertainty persists.

CENTRAL AFRICA

CAMEROON (10 February)

Aggregate cereal production in 2004 has been estimated at about 1.5 million tonnes, some 11 percent above average, following generally favourable growing conditions during the rainy season.

The overall food supply situation is satisfactory. Prices have been mostly stable across the country, following adequate food supply and reduced cross-border export to Nigeria, due mainly to relatively weak Naira and appreciated Franc CFA.

In a bid to diversify the economy in view of declining oil production, the Government launched recently a five-year campaign to revamp the cocoa sector and boost output to 200 000 tonnes per year. 160 000 tonnes of cocoa have been produced in 2003/04 in Cameroon, where between one million and two million people depend directly or indirectly on the cocoa sector.

CENTRAL AFRICAN REPUBLIC (CAR) (10 February)

Harvesting of the 2004 cereal crops is complete. The output is expected to recover somewhat, reflecting an improved security situation relative to the situation in 2003 and increased plantings following agricultural inputs distribution with assistance of FAO in the localities which were adversely affected by the 2003 rebellion.

The inflation estimated at 7 percent in 2003 due to increased food prices resulting from transport disruptions, slowed down in 2004 due mainly to an improved security situation. Inflation is expected to remain stable in 2005, which should improve access to food in the country. Although most of the 230 000 IDPs have returned home, an estimated 41 000 refugees from CAR are still living in Chad.

CONGO, DEMOCRATIC REPUBLIC OF* (17 February)

The relative improvement in the security situation since 2004 in the country and assistance provided to the internally displaced persons (IDPs) and returning refugees have had some positive impact on agricultural activities in the affected areas. However, recent clashes in the eastern part of the country have displaced over 100 000 people in the area in addition to the existing 3 million IDPs. Thus, the insecurity for the producers and traders (who are forced to pay unauthorized levies on farm their produce), the shortages of basic inputs (such as improved planting materials, hand tools, fishing equipment and veterinary supplies) and the decrepit rural infrastructure (notably feeder roads) are the main constraints to food production and distribution. Furthermore, staple crops, namely, cassava and banana this season have been severely damaged by pests and diseases.

In DRC, food insecurity affects over 70 percent of the total population of 57 million. Hence, the Government and the donor community, at the Round Table conference held in March 2004, confirmed agriculture sector rehabilitation as the cornerstone of their strategy for poverty reduction. The focus will be on two main components addressing emergency needs on one hand and achieving the medium to long term rehabilitation on the other. Under the Minimum Partnership Program for Transition and Recovery, the donor community has pledged US\$6.86 billion over the next 4 years, of which US\$285 million are intended for agriculture. The country has also received US\$39 million from the IMF under the Poverty Reduction and Growth Facility.

CONGO, REP OF (10 February)

Domestic cereal production covers about 3 percent of total cereal requirements; the balance is imported, mostly on commercial terms. In 2005 the import requirement of cereals, mainly

wheat and rice, is estimated at some 242 000 tonnes, virtually unchanged from the previous year.

Following the peace agreement between the Government and the rebels in March 2003, the Government and several international organizations have set up a Disarmament, Demobilization and Reintegration (DDR) programme for former militiamen. Under the DDR 42 000 former combatants are to benefit from reintegration during 2004-2006. The last 3 250 displaced people who were still living in camps near Brazzaville returned home in April 2004. According to the UNHCR, the country hosts a large number of refugees from conflicts in neighbouring countries, including DRC Congolese, Angolans and Rwandans. The security situation remains volatile and hampers humanitarian aid.

WFP is facing a serious shortfall in resources and is focussing more on emergency assistance to the most vulnerable groups (IDPs, returnees and malnourished households), while continuing to participate with other partners in rehabilitation operations as far as resources permit.

EQUATORIAL GUINEA (10 February)

The country does not produce a significant quantity of cereals. The staple foods are sweet potatoes, cassava and plantains. It imports on average 10 000 tonnes of wheat and 6 000 tonnes of rice.

In recent years inflation in Equatorial Guinea has been higher than in other countries of the Franc Zone, due to rapidly rising domestic demand since the oil boom began in the mid-1990s. However, annual inflation slowed down considerably in 2004, to 4 percent, from an estimated 7.3 percent in 2003.

GABON (10 February)

The main food crops are cassava and plantains. The only cereal crop grown is maize which is sown from July and harvested from November. In a normal year production reaches about 30 000 tonnes. Imports of cereals in 2005, mainly wheat and rice, are estimated at some 167 000 tonnes. Economic growth has trended downwards recently, due to declining oil production, which will continue to affect households' income and access to food.

SAO TOME AND PRINCIPE (10 February)

The staple food crops are roots, plantains and tubers. Annual imports of cereals are estimated at some 12 000 tonnes. Food aid needs for 2005 are estimated at about 3 000 tonnes. In 2003 agriculture accounts for 19 percent of GDP and about 86 percent of exports, but the structure of the economy will be significantly transformed by oil production which is expected to begin by 2010.

EASTERN AFRICA

BURUNDI* (10 February)

Harvesting of the main season crops, maize, sorghum and beans, planted in September-October, is currently underway. After a sporadic start of the season, heavy rains were experienced in December and January, except in the north and the northeast of the country where dry weather is expected to reduce the harvest substantially. Torrential rains in late January caused flooding which reportedly destroyed nearly 1 000 homes in the western part of the country. A Joint FAO/WFP/UNICEF/Ministry of Agriculture assessment mission is currently preparing its report. The results should be available soon. This season FAO distributed sweet potato cuttings to 7 500 vulnerable farmers and sorghum seeds to 75 400 households to help the process of farm resettlement. Planting of second season (2005B) crops should begin shortly.

Total cereal production for 2004 was estimated at 281 000 tonnes, about 3 percent higher than the year before. However, there was a decline in the production of legumes due to an early start of the dry season and in roots and tubers due to an outbreak of cassava mosaic virus; prices have increased considerably in some markets.

Insecurity continues to be reported in some areas of Bujumbura Rural province. Thus the slow-moving peace process remains very fragile. Since March 2003 more than 150 000 refugees from Tanzania have returned to Burundi but nearly as many remain in Tanzania.

ERITREA* (11 February)

An FAO/WFP Crop and Food Assessment Mission that visited Eritrea late last year found that in 2004, Azmera rains (March-May), important for land preparation and replenishment of pastures, in key agricultural areas failed and the main Kremti rains (June-September) were late and ended early. As a result, cereal production in 2004 is forecast at about 85 000 tonnes, less than half the average of the previous 12 years. Pastoralists were seriously affected by the delayed rains in parts and began early migration with their livestock to the coastal areas that receive the Bahri rains. The performance of the Bahri rains (October-February), important for crop and pasture development in the otherwise arid areas of the Northern Red Sea (NRS) Zone and the escarpments, were also unsatisfactory.

The cereal import requirement for 2005 is estimated at 422 000 tonnes, of which about 80 000 tonnes are anticipated to be imported commercially. With 80 000 tonnes of food aid pledged and in the pipeline, the uncovered deficit, for which international assistance is needed, is estimated by the CFSAM mission at 262 000 tonnes.

In 2005, an estimated 2.3 million people, about two-thirds of the whole population - including in urban and peri-urban areas - will require food assistance to varying levels. Timely support to crop and livestock production is urgently needed to revive production capacity in 2005. Short cycle and early maturing cereal seed varieties need to also be made available in case the apparent pattern of late rains in the last several years continues in the next years.

ETHIOPIA* (11 February)

A joint FAO/WFP Crop and Food Assessment Mission that visited the country late last year estimated the cereal and pulse production from the 2004 "meher" season at 14.27 million tonnes, 24 percent above the previous year's revised estimates and 21 percent above the average of the previous five years. Extended rainfall, increased fertilizer use (up by 20 percent) and a 30 percent increase in use of improved seeds, especially maize and wheat, boosted average yields in key production areas.

Despite the good harvest, some 2.2 million acutely food-insecure people will require emergency food assistance to meet minimum food requirements in 2005. In addition, some 683 000 people in Somali Region and 250 000 people in Afar Region, who will eventually be covered under the safety-net programme, will require emergency food assistance for the first half of 2005. Total emergency food needs in 2005 are, therefore, estimated at 387 500 tonnes. Targeted supplementary food distributions to 700 000 children under five and 300 000 pregnant and lactating women will require 89 000 tonnes of fortified blended food and vegetable oil.

What is unique and first in the history of food aid appeals for Ethiopia this year is the separation made between addressing the needs of chronically food-insecure people and acutely food-insecure people. The Productive Safety Net Programme (PSNP) will target about 5 million chronically food-insecure people in rebuilding their livelihoods through public and community works through cash and food transfers while the acutely food-insecure people will be targeted for emergency food distributions.

Timely marketing and transport of produce will be critical issues in 2005. Local purchase of food aid needs is recommended, as far as possible, to assist domestic markets.

KENYA* (11 February)

Prospects for the 2004/05 secondary "short rains" cereal crop, being harvested, are poor due to inadequate rainfall. This crop provides the main source of food in parts of Central and Eastern provinces and accounts for some 15 percent of total annual production. The output of the 2004 main "long rains" maize crop estimated at about 1.7 million tonnes and harvested from August was well below average. Overall, total cereal production in 2004/05 is estimated at about 2.5 million tonnes, about 13 percent below the average of the previous five years.

Maize prices dipped slightly from December 2004 but are generally much higher than the average for the same period. In December, maize prices were 30 to 60 percent higher compared with the average in most major markets.

Despite improved pasture conditions in most pastoral districts, particularly in the north-east, conditions have remained poor in some pastoral areas that received inadequate rainfall, including western Marsabit, the lowlands of Baringo, Western Mandera, north-eastern Turkana and most of Kajiado District. The impact of earlier successive poor seasons has also left large numbers of households highly vulnerable and unable to cope with continued losses of livestock and livelihood options.

RWANDA (10 February)

Harvesting of 2005A main season crops (beans, maize and sorghum) is underway in Rwanda. Weather has been erratic this year with below normal precipitation at the beginning of the season with heavy rains in early December and January with the overall cumulative rainfall being below normal. Consequently, crop prospects are considered not good. FEWSNET reported higher prices for several important food commodities in 2004 as compared to 2002 and 2003. However, harvest time prices of potatoes and sorghum had come down significantly in December from the prices in November. Rwandan economy grew 6 percent in 2004 primarily due to a strong performance of the agriculture sector. However, according to the preliminary results of the currently ongoing joint FAO/WFP/UNICEF/Government assessment, a total of 30 000 tonnes of food aid would be required in 2005. The influx of refugees from DRC and Burundi in recent weeks has continued; the number currently stands at about 50 000. This is expected to have negative food security implications for Rwanda.

SOMALIA* (11 February)

The recent Asian tsunami has affected also a number of settlements in Somali along a 650-km stretch of coast line between Hafun district and the town of Gara'ad in North Mudug region, Puntland State. The brutal waves are estimated to have caused the death of between 100-300 people and displaced 5 000 people. Fishing gear and equipment were lost in large quantities and hundreds of homes and boats were destroyed or damaged, while fresh water wells and reservoirs became unusable. Up to 30 000 people are in need of relief assistance till the start of the next fishing season at the end of 2005.

In southern Somalia, harvesting of the 2004/05 secondary "deyr" season cereal crop, which normally accounts for 25 to 30 percent of annual cereal production, is almost complete. In its post deyr seasonal assessment report, the Somalia Food Security Analysis Unit (FSAU) indicated that the exceptionally good 2004/05 deyr rains have led to above average cereal production in most cropping areas. Accordingly, the season's production is estimated at more than 122 000 tonnes, 21 percent above the post-war average. Elsewhere, the 2004 "karan" cereal production, harvested in December 2004 in north-western Somalia was estimated at about 17 000 tonnes, which is 17 percent above the post-war average. At this

level, total cereal production in 2004/05, including the main “gu” crop harvested last August/September, is estimated at 264 400 tonnes.

Despite the good deyr harvest, however, an estimated 500 000 people continue to experience serious food insecurity and high malnutrition rates due to insecurity, previous high loss of livestock assets, poor rangeland conditions, high household debt and destitution. These people require immediate humanitarian assistance in the form of resource transfers and livelihood support. The FSAU has indicated a revised national cereal shortfall of about 8 000 tonnes in 2004/05 (August/July) marketing year. Further information and analysis can be accessed at: www.unsomalialia.net under the FSAU web page.

SUDAN* (11 February)

The first week of January 2005 brought some optimism as a peace deal was signed to end the war in southern Sudan. Since 1983, more than 2 million people have died and another 4 million have fled their homes. With a large number of returnees expected in the following months, the humanitarian challenges and rehabilitation and reconstruction needs of the shattered economy and infrastructure will be enormous. The continued crisis in Greater Darfur, where fighting has forced more than 2 million people from their homes and farms, is another huge humanitarian challenge. Reports paint a grim picture where the conflict has engulfed almost all parts of Greater Darfur, making it very difficult for agricultural activities and humanitarian assistance.

An FAO/WFP Crop and Food Supply Assessment Mission (CFSAM) to southern Sudan in October 2004 reported a decline in current season’s cereal harvest compared to the previous year. In central and northern Sudan, a below average cereal production is forecast due to erratic rainfall and civil unrest. Current estimates for 2004 put total cereal production in Sudan at about 3.9 million tonnes, more than 12 percent below the average for the previous five years.

TANZANIA, UNITED REPUBLIC OF (11 February)

Harvesting of the 2004/05 short “Vuli” season cereal crops in the bi-modal rainfall areas has just started. The overall outlook is poor due to erratic rainfall. Seed shortages were also reported to have limited the season’s planting.

The 2003/04 cereal crop, mainly maize, is estimated at about 4.8 million tonnes, more than 19 percent above the previous year’s crop and the previous five years average. The overall food supply situation is satisfactory with stable or declining cereal prices in central, east coast, lake and northern Tanzania. Some 12 districts in northern and central Tanzania, mainly in the regions of Arusha, Kilimanjaro, Dodoma, Morogoro, Shinyanga and Singida are reported to face varying degrees of food insecurity.

UGANDA* (11 February)

Harvesting of the 2004/05 second season food crops is almost complete and an average crop is expected. The harvest has improved food security by replenishing household stocks and market supplies. The flow of crops to major markets, including conflict affected areas, is normal. However, prices are relatively high following the reduced 2004 main season food crops and are yet to respond to the ongoing harvest. WFP continues to provide emergency food relief to over 200 000 people in West Nile and Karamoja Regions due to drought conditions.

The civil strife in northern Uganda, despite reduced rebel attacks in recent months, continues to severely constrain the food situation of the population. Over 1.4 million displaced persons sheltering in over 100 congested protected camps, continue to depend on WFP food assistance for survival.

SOUTHERN AFRICA

ANGOLA* (10 February)

Normal to above normal planting rains were received for the main season crops at the start of the 2004/05 agricultural season. If the trends were to continue the crop prospects this year look favourable. The 2004 cereal harvest was estimated at about 724 000 tonnes, about 9 percent over last year or 27 percent over the previous five year average. This was mainly the result of the increased areas under cultivation, favourable weather, resettlement of many internally displaced people and refugees and substantial distribution of agricultural inputs. Improved harvests in the northern and southern parts of the country and mixed results in the central highlands were experienced. In spite of the good harvest, the country needed cereal imports of about 820 000 tonnes for 2004/05, of which 642 000 tonnes were expected to be in the form of commercial imports and 178 000 tonnes as emergency food aid.

Challenges to improving food production in the country include access to productive inputs such as draught animals, fertilizer and agriculture extension services. Recently the World Bank has approved a grant of US\$21 million to Angola for implementing the HIV/AIDS, Malaria and Tuberculosis Control Project.

Angolan economy which produces more than 1 million barrels a day of crude oil that fetched more than double the budgeted price in the international market in 2004, is expected to boom with the Government prediction of 16 percent growth in 2005. Ironically, a large number of food insecure people exist in the country. WFP with its limited food distribution currently feeds about 850 000 vulnerable people, most of them internally displaced persons (IDPs). With the improvement in the security situation, large numbers of IDPs and refugees have returned to their areas of origin.

BOTSWANA (10 February)

Satellite imagery analysis (NDVI) suggests less than normal growth of the main season crops/vegetation throughout most parts of the country, except in the east where above average precipitation has been recorded. According to a Ministry of Agriculture statement, cereal plantings (mainly sorghum) are substantially reduced this year due to the erratic and insufficient rainfall. However, domestic cereal production in Botswana typically amounts to 5-10 percent of the country's total needs. The 2004 cereal production, mainly sorghum, was estimated to recover from the previous year's drought affected harvest to a more normal level of about 19 000 tonnes. Botswana's cattle industry has been battered by two successive outbreaks of foot-and-mouth disease that resulted in destruction of over 16 000 animals during 2002 and 2003 and loss of access to the European markets.

LESOTHO* (10 February)

Sporadic and generally inadequate rainfall in Lesotho is a cause for concern as the country tries to recover from the multi-year drought. Although heavy rains were received recently, the cumulative precipitation this season has been substantially below normal. The food supply situation, especially during these lean months, remains very tight due to a 60 percent drop in cereal production in 2004 from the year before. Although much of the cereal import requirements can be covered on commercial basis, mainly from South Africa, lack of purchasing power of a large section of the population has created a major problem of food insecurity. Emergency food relief for 2004/05 marketing year (April/March) was estimated at 48 500 tonnes of cereals for the most vulnerable people affected by crop failure and by HIV/AIDS. Since January 2005 a new regional Protracted Relief and Rehabilitation Operation (PRRO) of WFP is intended to benefit on average 171 000 people.

MADAGASCAR* (10 February)

Normal to above normal rains were received for planting of the main season crops, rice, maize and sorghum at the start of the 2004/05 agricultural season in October-November. Heavy rains were experienced in December and January. The area planted to paddy is reported to have increased in response to the current high rice prices. The official estimate of paddy production in 2004 is 3 million tonnes, some 8 percent higher than the year before. Maize production was estimated at an average level of 170 000 tonnes, an increase of about 10 percent on the previous year's drought-reduced harvest. The impact of cyclones in 2004, rising cost of oil imports and depressed prices of its main exports such as vanilla and shrimp have caused serious food security problems for vulnerable groups. Since April 2004, rice prices have been on the rise. High prices are expected to benefit farmers with marketable surpluses.

The rapid rise in the price of rice (for example, from 2 400 Fmg or about US\$0.25 per kg in April to about 7 000 Fmg or US\$0.74 in December) primarily due to high world prices and devaluation of the local currency, has seriously affected the food security situation of the country. Rice imports have declined sharply this year causing the "rice crisis" in the country. In June the European Union committed 70 million euros to its biggest ever African project to rehabilitate the main north-south road. In October the IMF announced disbursement of US\$16.6 million aimed at promoting economic growth and reducing poverty. Reportedly more than 75 percent of Madagascar's 16 million people live below the poverty line of US\$1 a day.

MALAWI* (10 February)

The cumulative rainfall since the beginning of the current agricultural season started in October 2004 has been above normal throughout most areas of the country. According to the country's Department of Meteorological Services, no serious dry spells were reported. Crop growth in general is considered satisfactory. In some areas in the south, however, heavy rains resulted in localized seasonal flooding. Food supplies in the country are readily available due to unrestricted cross border trading with the neighbouring countries but limited access to food for low-income families with rising staple food prices is a problem. In most markets, 2004 prices were consistently higher than the ADMARC subsidized corresponding prices in 2003. However, current maize prices are lower than the corresponding prices during 2001. Maize prices have stabilized around 17-20 MK/kg as a steady stream of cross border imports flow from neighbouring Mozambique.

For the current marketing year 2004/05 (April/March) the Vulnerability Assessment Committee (VAC) estimated that about 1.3 million vulnerable people including those in areas that experienced crop failures and those seriously affected by HIV/AIDS would require emergency food assistance to the tune of 56 000 tonnes of cereals.

MAURITIUS (10 February)

Domestic production of cereals in Mauritius amounts to less than 1 percent of total cereal needs; consequently the country imports commercially virtually its entire cereal consumption requirements. Sugarcane is grown on about 90 percent of the cultivated land area and accounts for 25 percent of the country's export earnings.

The anticipated loss of preferential access to US and European markets by 2007 is expected to have negative consequences for sugar and textiles, the two important export earning industries in the country. For the last three years Mauritius is experiencing relatively high (in excess of 10 percent) unemployment rate according to the Economist Intelligence Unit, nearly double the average of 5.9 percent for 2000.

MOZAMBIQUE (10 February)

Up to now Mozambique this season has experienced a mixed weather pattern with heavy rains in the centre, favourable in the north and spotty in the south. The Zambezi Regional Water Board (ARA - Zambeze) issued a maximum alert on 1 February on account of flooding along Zambezi and Pungue rivers due to heavy rains locally and in neighbouring Zambia affecting 7 districts in central Mozambique. However, according to a government communiqué of 4 February, the water levels in most risk prone areas were falling and had subsided below the critical marks. Damage to the main staple food crops, maize and sorghum planted in November-December 2004 and cash crop sugar cane is unknown at this stage. Floods notwithstanding, if the generally satisfactory crop growth trend were to continue, the prospects for 2004/05 season crops would be considered favourable.

Cereal production in 2004, estimated at about 2 million tonnes (some 17 percent above average and 11 percent above good harvest of the previous year), showed a continuation of steady recovery over the past several years. Despite the overall satisfactory national production, the country as a whole, however, faces a net deficit of about 610 000 tonnes of cereals particularly in the south and parts of the centre.

The overall food security situation in the country is satisfactory. As reported by SIMA/MADER, maize retail prices have stabilized in most markets in the country and are consistently lower currently compared to the same months in previous two years. Vulnerability analysis indicated in April 2004 that some 187 000 people are in need of 49 000 tonnes of relief food assistance in marketing year 2004/05 due to the impact of floods/droughts in the previous years and to cope with the HIV/AIDS problem. Since then, the food security situation has improved owing to a good agricultural performance during the second season.

NAMIBIA (10 February)

According to the Namibia Early Warning and Food Information Unit (NEWFIU) the 2004/05 agricultural season was delayed and generally dry weather conditions have hampered prospects for good harvest. It was also reported that nearly all farmers in the eastern Caprivi were beneficiaries of emergency seed distribution programme at the start of the season. Farmers also benefited from the government's extended draft animal power acceleration programme and Productivity Upliftment Micro Project which supplies ploughing implements and accessories. In 2004 despite heavy rains and flooding in Caprivi and Kavango, north-eastern provinces, total cereal production was estimated by NEWFIU at 131 000 tonnes, 28 percent higher than the previous year's above average output. At the usual level of consumption, this resulted in about 150 000 tonnes of cereal import requirement, largely to be met by commercial suppliers.

According to the UN's Integrated Regional Information Network (IRIN), the valuation of commercial farmland is nearing completion which will be used to create a land tax fund to finance, in part, the state's acquisition of agricultural land for the purpose of resettling thousands of landless Namibians.

SOUTH AFRICA (20 February)

With below normal and erratic rains so far the 2004/05 agricultural season for the main crops did not start very well in South Africa. However, relief was brought by heavy precipitation in December and late in January in the maize triangle in the north-eastern part of the country. Western Cape Province is experiencing a third year of drought in a row. Nationally maize plantings this season are estimated at about 3 million hectares, more or less similar to the year before. The first official estimate for 2005 summer maize crop is put at 10.5 million tonnes, about 8 percent above last year.

The final official production estimate for the winter wheat crop harvested in October-November 2004, at 1.7 million tonnes, indicates an increase by about 10 percent over the previous year. This would translate into a wheat import requirement for the year in the magnitude of one million tonnes. The final estimate of total maize harvest of 2004 has been revised upwards by the country's Crop Estimation

Committee (CEC) to 9.7 million tonnes. In spite of the much publicised drought in the country this level of production is almost the same as the year before and even slightly better than the previous five year average.

With the fear of a severe drought in the country in 2004, the SAFEX price of white maize had soared to US\$216/tonne in early February 2004 which has now declined to about US\$105/tonne by early February with improved crop production locally and internationally and substantial drop in the international price of maize.

SWAZILAND* (10 February)

Planting and crop growth of main season crops has been spotty this season due to ill-distributed low rainfall since the start of the season in October 2004. Short but heavy rains in December-January were reported and should help the crops. According to the National Disaster Task Force some damage to the maize crop was caused by hailstorm on 23 January. Thus the prospects for crops at this stage are considered as unfavourable. The food security situation throughout the country is serious following a drought that caused 30 percent reduction in the 2004 harvest of main season cereals. With a self-sufficiency rate for cereals of only about a third, the Swazi population is mostly dependent on food imports. The cereal import requirements in the 2004/05 marketing year (May/April) are estimated at about 132 000 tonnes, of which about 100 000 tonnes are expected to be imported commercially. The balance (32 000 tonnes) is anticipated to be covered by food aid targeted to the most vulnerable people numbering 142 000, primarily for mitigating the impact of HIV/AIDS and providing direct support to households unable to access available food and agricultural inputs.

ZAMBIA (10 February)

With late onset of rains, planting of main crops in some areas this season was delayed. The rains picked-up in December and in late January helping new plantings and growth of plants in the ground. Nonetheless, nationally the cumulative rainfall since October 2004 has been below average with the highest rain in the north and the lowest in the south. Still the overall prospects for good harvest are considered favourable. Long range forecast for the season is considered to be normal. Similar to last year, the Government's subsidy programme for fertilizer and seed to selected farmers was also implemented. As a result of two consecutive good harvests maize prices are reported to be below the ten-year average (FEWSNET).

The 2004 cereal production, estimated at 1.37 million tonnes, was 1 percent over the 2003 bumper harvest and about 23 percent above the average of the past five years. Considering the country's total utilization needs and substantial carryover stocks, an export surplus of about 150 000 tonnes is expected during the 2004/05 marketing year. According to the Ministry of Agriculture and Cooperatives, the area under mature cassava increased by 47 percent from 140 251 hectares in 2002/03 to 206 051 hectares in 2003/04 resulting in a production increase of 46 percent to about 1.4 million tonnes. The food security situation in the country is relatively good. With surplus maize available from the last two seasons, WFP intends to purchase locally 80 000 tonnes of maize in 2005 for its national and regional operations.

ZIMBABWE* (10 February)

Planting of main crops this agricultural season was delayed due to a sketchy start of the rainfall. Most areas received good precipitation in December and later part of January. However, the cumulative rainfall in the country has been below normal. Judging from the latest satellite images, below normal vegetative/crop growth throughout the country is anticipated, except for some northern districts where improved precipitation was beneficial. Farmers were also reported to have faced fertilizer, fuel, spare parts and draught power shortages.

Reportedly, maize purchases by the government's Grain Marketing Board (GMB) have been significantly lower than expected. As stated by the FEWSNET the parallel market prices of

maize at mid-December 2004 varied from Z\$830/kg in surplus areas (mostly in the north-central part of the country) to Z\$2 225/kg in peripheral deficit areas. These prices have risen from the average of Z\$280 to Z\$560 per kg during post-harvest period in April. Thus, the continuing hyper inflation, estimated at an annual rate of 149 percent in November 2004 (although steadily declined from about 600 percent at the beginning of 2004) combined with extremely high levels of unemployment, greatly limit access to food for the most vulnerable population groups. According to the Vulnerability Assessment Committee (VAC) about 2.3 million people in rural areas alone are not able to cover their food needs, and likely as many in the urban areas.

NEAR EAST

CYPRUS (11 February)

Sowing of the 2004/05 wheat and barley crops for harvest from May has been completed. Production of barley in 2004 has been revised to 95 000 tonnes, similar to the average of the previous five years. Imports of cereals in 2004/05 (May/April), mainly wheat and barley are forecast at the previous years' level of some 645 000 tonnes.

IRAN, ISLAMIC REPUBLIC OF (9 February)

Currently the main crops in the ground are wheat, the country's main staple, and barley. Harvesting of barley will commence from March, whilst that of wheat will begin around May/June.

Wheat output for 2004 has been estimated at record 14 million tonnes, 0.5 million tonnes up from last year's bumper crop and 3.6 million tonnes more than the average of the previous five years, reflecting a substantial financial support from government and favourable weather. As a result of the increased production, the country is expected to maintain self-sufficiency in Wheat in 2004/05.

The International Federation of the Red Cross together with the Iranian Red Crescent Society has started the reconstruction and rehabilitation (from September 2004 to December 2005) for Bam Earthquake, which killed over 26 000 people, injured over 30 000 and left 75 600 homeless.

IRAQ* (11 February)

Despite recent precipitation in the region, prospects for the 2005 winter grain crops in Iraq, for harvest in from next May, are uncertain. The 2004 total cereal production is estimated at 2.9 million tonnes, above the average for the previous five years.

The Public Distribution System (PDS) operated under the Oil-for-Food programme established by SCR 986 (1995) provides food for the entire population of approximately 26.3 million Iraqis. The Ministry of Trade took over from WFP in contracting for food. WFP is to implement a one-year emergency programme for the most vulnerable. According to a study conducted by the Ministry of Health in cooperation with Norway's Institute for Applied International Studies and the UNDP, acute malnutrition among children younger than 5 increased to 7.7 percent this year compared to 4 percent two years ago. The nutrition surveys indicate that conditions are worst in southern Iraq.

ISRAEL (11 February)

Early prospects for the 2005 wheat and barley crops, to be harvested from April are favourable so far, reflecting improved precipitation. Domestic production of wheat in normal years covers less than one-fifth of total requirement, the rest being imported commercially. Aggregate production of wheat and barley in 2004 is estimated at 128 000 tonnes, nearly 8 percent below the average of the previous five years. Imports of cereals in 2004/05 (July/June) are forecast at about 3.05 million tonnes.

JORDAN (11 February)

The sowing of the 2004/05 winter grains was completed last December under generally good weather conditions. Favourable rains and snow cover have helped restore soil moisture.

Aggregate production of wheat and barley in 2004 was estimated at 25 000 tonnes, more than 56 percent below the average of the previous five years. This is mainly due to last year's severe drought conditions that affected most parts of the country. Domestic cereal production normally meets only a small proportion of consumption requirements the rest being covered by imports. Imports of wheat in 2004/05 (July/June) are forecast at 860 000 tonnes, about 10 percent higher than the previous year. Coarse grain imports are forecast at 900 000 tonnes, similar to 2003/04.

LEBANON (11 February)

The sowing of the wheat and barley crops, due for harvest from June, was completed under generally improved weather. Production of cereals in 2004 is estimated at 131 000 tonnes which is below average.

Imports of cereals, mainly wheat, in 2004/05 (July/June) are forecast at some 0.79 million tonnes, similar to the previous five years average.

SAUDI ARABIA (11 February)

Growing conditions for the 2004/05 wheat and barley crops due for harvest from April have improved due to recent precipitation. Production of wheat in 2004 is estimated at 1.6 million tonnes, about 20 percent below the previous year. Imports of coarse grains (mainly barley and maize) in 2004/05 (July/June) are forecast at 7.4 million tonnes, about 2 percent above the previous year.

SYRIA (11 February)

Good rains and snow cover have improved prospects for the wheat and barley crops to be harvested from May. Production of wheat in 2004 is estimated at an above-average level of 4.7 million tonnes. Barley output rose significantly to 1.1 million tonnes about 20 percent above the average for the previous five years.

Imports of cereals in 2004/05 (July/June) are forecast at a total of 1.6 million tonnes, about 12 percent above the previous last year.

TURKEY (11 February)

Early prospects for the 2004/05 wheat and barley crops, normally planted between September and November, have improved with recent heavy rain and snowfall. The 2004 wheat production, harvested last summer, is estimated at 20.5 million tonnes. At this level, it is nearly 1 million tonnes higher than in 2003 and about 5 percent above the average for the previous five years. Similarly, the 2004 output of coarse grains (mostly barley and maize) increased by about 600 000 tonnes to 11.3 million tonnes. Paddy production in 2004 is estimated at 400 000 tonnes about 7 percent higher than the previous year.

Wheat imports in 2004/05 (July/June) are forecast at 800 000 tonnes compared with 1.2 million tonnes estimated for the previous year. Maize imports are also forecast to decrease by nearly 300 000 tonnes to 800 000 tonnes. According to the 2005 Tariff Schedule, most import duty rates remained the same as last year's rates. However, some duty rates, including for wheat, maize and sorghum were raised in 2005.

YEMEN (11 February)

Land preparation for the sowing of the main sorghum and millet crops to be harvested towards the end of the year is about to start. The output from the 2004 sorghum crop is estimated at some 250 000 tonnes, more than 20 percent below last year and the average of the previous five years. Output from the wheat crop also decreased to 98 000 tonnes from 104 000 the previous year. Maize production estimated at 32 000 tonnes was similar to the previous year but was 27 percent below the average.

Imports of cereals in 2004 - mainly wheat - are estimated at 2.6 million tonnes, about 4 percent higher than the previous year, while an increase is forecast in 2005.

ASIA

AFGHANISTAN* (9 February)

Latest reports and satellite imagery show that heavy snowfall as well as above average rainfall throughout much of the country, though less so in the south and south-west, may substantially replenish the depleted water tables throughout the country. In addition, the heavy snowfall is seen to provide the much-needed water for irrigation throughout spring and summer. Sufficient soil moisture will also enable many farmers, particularly in the North of the Hindukush Mountains, to plant significantly large areas with rainfed cereals. It is too early to forecast cereal harvest as the overall harvest depends on spring and summer precipitation, temperatures as well as locust, pests and disease outbreaks. However, the prospects are for a good harvest this year provided favourable weather conditions prevail and locust, pests and diseases remain under control. Last year drought conditions existed in much of the country and aggregate cereal harvest was estimated at about 3 million tonnes, which was 43 percent down on the record harvest in 2003 and 21 percent down on the average harvest in 1998.

Provided extraordinary factors do not affect crops this year, the need for imported food aid will significantly diminish. However, food assistance, preferably domestically procured if feasible, will still be necessary as access to food by many vulnerable households remains difficult.

ARMENIA (9 February)

Latest reports indicate that 127 000 hectares have been planted with winter cereals, similar to last year but about 15 000 hectares up on the five-year average. Winter cereals are reportedly in satisfactory conditions and aggregate cereal harvest may match the good harvest in 2004, which totalled some 424 000 tonnes. The aggregate cereal harvest in 2004 included some 350 000 tonnes of wheat, 62 000 tonnes of barley and 6 000 tonnes of maize. Potato is the second most important food crop after wheat. Potato yields over the past few years have continued to improve, owing to the introduction of new high yielding varieties in the country through technical assistance projects from FAO. Armenia is a food deficit country and continues to depend on food imports even when harvest is above average. Aggregate cereal import for the current marketing year (2004/05) is estimated at about 169 000 tonnes, including 50 000 tonnes in food aid.

AZERBAIJAN (9 February)

Latest reports indicate that similar areas to last year have been planted with winter cereals and crops are reportedly in good conditions. Aggregate cereal harvest will depend on spring and early summer precipitation and temperatures. In 2004 aggregate cereal harvest was estimated at some 2.13 million tonnes, slightly up on the good harvest in 2003. The aggregate harvest in 2004 included about 1.7 million tonnes of wheat, 232 000 tonnes of barley and 150 000 tonnes of maize. Generally favourable weather conditions and adequate soil moisture as well as improved access to purchased inputs contributed to last year's good harvest. Azerbaijan is a net cereal importer and requires over 3.7 million

tonnes of cereals per year to meet domestic needs. Aggregate cereal import requirement for 2004/05 marketing year is forecast at about 980 000 tonnes, mainly food quality wheat.

BANGLADESH (9 February)

Bangladesh was also hit by the tsunami disaster but the damage, mainly in the fishery sector, was limited compared to the worst affected countries.

The main crops in the ground are wheat and irrigated Boro rice. Wheat is planted in November/December for harvest from late March. The area planted is estimated at 19 000 hectares, far above the government target (12 000 hectares), due to the favourable weather and availability of quality seeds and fertilizers. The irrigated Boro crop, accounting for 45 percent of paddy production in the country, is planted from November through January for harvesting from April. The area planted is estimated unchanged from last year.

The current food supply situation in the country is tight as the food grain stock in the government's warehouses had been depleted to dangerous level in mid-January: only about 450 000 tonnes of rice and 500 to 700 tonnes of wheat.

The floods in the late summer of last year had devastating effects on the agriculture sector. Until now WFP has distributed High Energy Biscuits (HEB) to over 600 000 primary school students in flood-affected areas. As at 31 December 2004, 2 990 tonnes HEB had been distributed and 230 tonnes of HEB were planned for distribution in January. Shipment of rice destined for Bangladesh was shifted to Indonesia to feed the tsunami victims. Rural Livelihoods and Infrastructure Rehabilitation activities have been delayed.

CAMBODIA (9 February)

Harvesting of the country's wet season rice and other crops is nearly finished. The main wet season rice crop normally accounts for some 80 percent of annual rice production. The second paddy crop (dry season) is presently in the ground. The area planted is estimated at 280 000 hectares, some 14 000 above last year's level. Crop growing conditions are normal.

The 2004 aggregate paddy output is estimated at 4.5 million tonnes, 200 000 tonnes less than the previous year's record harvest, reflecting a drought in late wet season, but 360 000 tonnes more than the average of the previous five years. The country's food supply situation in 2005 is satisfactory and domestic production can almost meet needs.

CHINA (9 February)

In China mainland, the winter wheat, normally accounting for some 95 percent of total wheat output, is currently in the ground. The sown area for this season is estimated to have expanded by about 5 percent, or 1 million hectare from last year as a result of attractive prices and favourable planting conditions. Weather conditions to date have been beneficial in the major wheat producing regions.

Total cereal production in 2004 is estimated at 359 million tonnes (milled basis), up 11 percent on last year (wheat by 5.6 percent, rice 15 percent and maize 11 percent), marking the first increase in year on year production since 1998, as a result of nearly perfect weather, strong prices and a series of government incentive support policies. However, China will change its net trade position in cereals from a net exporter in 2003/04 (July/June with net export of 9.6 million tonnes) to a net importer in 2004/05 (with net import 3 million tonnes), reflecting reduced production in the last several years and very low carryover stocks.

The State Council, China's cabinet, in its major policy document on rural affairs issued in January 2005 stated that China will continue the agricultural support policies (tax cuts, direct subsidies and subsidies for seeds and tools, minimum protective prices) this year to increase grain production and farmers' income. Crop areas for wheat, rice and maize are forecast to continue to rise in 2005. But

China is expected still to face a grain deficit and would continue to be a net grain importer in 2005/06.

GEORGIA (9 February)

Latest reports indicate that Georgia harvested about 663 000 tonnes of cereals in 2004, nearly 66 000 tonnes down on the harvest in 2003. Last year's harvest included some 217 000 tonnes of wheat, 385 000 tonnes of maize and some 50 000 tonnes of barley. Adverse weather conditions and political developments in the country are reported to have contributed to lower than expected harvest. Georgia requires some 1.3 million tonnes of cereals per year to meet domestic requirements. Aggregate cereal import requirement is estimated at about 575 000 tonnes including some 125 000 tonnes in food aid.

WFP, under a three-year Protracted Relief and Recovery Operation (PRRO), has distributed a total of 7 500 tonnes of food to some 220 000 beneficiaries since the start of the PRRO in July 2003. The current PRRO, which is scheduled to come to an end by June 2006, comprises of relief and recovery components, mainly food distribution to vulnerable groups and Food-for-Work programmes.

INDIA (9 February)

The tsunami of 26 December 2004 caused over 10 700 deaths with thousands more missing and affected some 2.731 million people. The states of Tamil Nadu and Andhra Pradesh in India's south-east coast and the Andaman and Nicobar islands were the worst affected areas. At least 140 000 people, mostly from fishing families, are in relief centres established by the Government.

Fishing communities have borne the brunt of the damage and losses of livelihood. The fishery and aquaculture sectors in Tamil Nadu and Andhra Pradesh and in the islands of Andaman and Nicobar have suffered major damages. Many fishing villages in these areas have lost human life, fishing boats, hatchery facilities, shelters and other property. In Andhra Pradesh alone, which normally produces some 25-30 percent of India's total seafood exports, 2 000 fishing boats were estimated lost, some 300 000 fishers were rendered jobless and some 400 fish tanks were damaged.

Over 134 000 hectares of paddy crop land in Tamil Nadu (mostly in Nagapattinam district) were severely affected.

The Government of India, in collaboration with the States/Union Territories, mounted massive relief and rescue operations. The first phase of relief and rescue operations is over and the GoI is now preparing a comprehensive rehabilitation and recovery programme under the coordinating authority of the Planning Commission. The Government did not appeal for external assistance for the emergency relief phase, but has requested the UN System, the World Bank and ADB to provide support and mobilize resources for the rehabilitation and reconstruction phase.

The main rabi (winter) crop currently in the ground is wheat, which is planted in the period October to December, for harvest in March-April. The area under cultivation is reported to marginally lower than the previous year due to crop diversification towards oilseeds. Met department has declared central India (Maharashtra, Gujarat and Madhya Pradesh), which are major wheat producers, rain-deficit this winter. In general, rainfall was below normal in many growing areas, with 39.6 percent of wheat areas receiving below-average rainfall up to 2 February. Despite the unfavourable conditions so far, the government is expecting 2005 wheat output to reach 75 million tonnes, some 3 million tonnes higher than 2004. The Food Corporation of India and State Government agencies expect to procure 18 million tonnes of wheat for the Public Distribution System during the coming marketing year.

The latest estimate for 2004 kharif (monsoon) rice production is put at 85 million tonnes, some 2 million tonnes, or 2 percent below 2003, reflecting the negative impact of both floods and droughts during growing stage. Overall 2004 cereal output (milled basis) is estimated at 190.5 million tonnes, some 3.7 million tonnes or 2 percent up on the previous year.

India was one of the world's largest exporters of wheat and rice in 2003/04 and exported 5 million tonnes of wheat and 2.6 million tonnes of rice. The export levels in 2004/05 are forecast to be much lower due to tight grain stocks.

INDONESIA (9 February)

The western island of Sumatra, the closest inhabited area to the epicentre of the earthquake, was devastated by tsunami. The death toll in Indonesia from the tsunami rose to over 230 000 (including dead or listed as missing). More than 70 percent of the inhabitants of some coastal villages are reported to have died. The most affected areas are located in Aceh province and two districts in North Sumatra.

In Aceh province, agriculture is important for the economy, accounting for 32.2 percent of regional GDP and employing 47.6 percent of the labour force in 2003. In agriculture, food crop production was the predominant activity with minor contributions from horticulture, plantations and animal husbandry.

The 2005 main season paddy and maize crops, to be harvested from March, were already in the ground when the tsunami hit Sumatra. The island of Sumatra is the second in Indonesia in terms of rice production, but the two worst affected provinces together (all districts) account for some 10 percent of the aggregate national output in a normal year. FAO assessments indicate that some 40 000 hectares of irrigated lands have been devastated by the floods and 30 981 hectares of paddy damaged. The immediate crop losses are estimated at 80 000 tonnes of paddy and 160 000 tonnes of other crops. Besides the immediate losses in crop production, sand and mud deposits on the agricultural land, erosion, salinization and irrigation scheme damage, will result in some permanent loss in agricultural land. In addition to the tsunami damage, flash floods in the last dekad of January have reportedly destroyed over 21 793 hectares of rice fields and 3 686 hectares of maize crops in Lampung. The flood waters also damaged 16 678 hectares of rice fields in the neighbouring province of South Sumatra. The crop damage will have a serious impact on food security for the affected populations, although it is not expected to affect overall national prospects for the 2005 main paddy harvest.

Livestock has been a growing sector in Aceh province. The preliminary estimate indicates that 23 300 large ruminants, 21 000 small ruminants and about 2.5 million poultry birds were lost due to the tsunami. The fisheries sector is an important economic activity for Sumatra Island, accounting for about one-third of the national fish catches. The sector provides employment to over 100 000 people in the disaster affected areas of Aceh Province and Northern Sumatra. Some 65-70 percent of the small scale fishing fleet and associated gear was destroyed. Some 15-20 percent of the fishers in the 18 worst affected kabupatens have been killed. The output of Aceh's fishing industry is estimated to fall by 60 percent in 2005. Losses of fishing equipment and gear, destruction and damage to fishery infrastructure and facilities, including fish ports and fishponds, will have a long-term negative impact to national and local economy.

WFP has provided some 8 200 tonnes of food aid since the advent of the disaster. The Government of Indonesia declared on 4 February that the first phase of the emergency relief operation in Aceh province has ended and that recovery and reconstruction in tsunami-affected areas will begin. There are now 250 international organizations operating in Aceh province. FAO continues to take the lead in the coordination of relief and recovery in agriculture and fisheries.

The overall food supply situation in Indonesia is satisfactory. The aggregate 2004 paddy output (main and secondary seasons) was officially estimated at 54 million tonnes, some 4 percent above the good harvest of 2003, due to excellent growing conditions and government support to domestic producer price. Indonesia has been a large rice importer in recent years. However, following last year's bumper crop, the Government banned imports of rice in 2004. The government has extended this ban until June 2005.

JAPAN (9 February)

The only crop currently in the ground is winter wheat. The main rice crop sown in May-June was harvested in October-November and 2004 output is estimated at some 11 million tonnes, 12 percent above last year's weather-affected production and 2 percent below the average of the previous five years.

The import of cereals in 2004/05 (July/June) is forecast at 26 million tonnes (coarse grains some 20 million tonnes, wheat 5.6 million tonnes and rice 0.7 million tonnes).

KAZAKHSTAN (9 February)

Latest satellite imagery and other reports show favourable weather conditions and good precipitation, which will provide sufficient soil moisture for spring crops and protective snow cover for winter cereals. Spring cereals are the most important crops in the country's cropping calendar, winter cereals account for a mere 5 percent of the aggregate area planted with cereals. Last year Kazakhstan harvested a total of 12.6 million tonnes of cereals, which was some 3 million tonnes down on the harvest in 2003 and 1.7 million tonnes down on the five-year average production level. Last year's harvest included some 9.9 million tonnes of wheat, 1.6 million tonnes of barley and 475 000 tonnes of maize. The main reasons for the low harvest last year were relatively adverse weather conditions and lower than average wheat prices.

Aggregate cereal exports during 2004/05 marketing year are forecast at about 4.8 million tonnes compared with nearly 5.9 million tonnes during the 2003/04 marketing year. Wheat is, by far, the most important crop in the country both in terms of production and exports.

KOREA, DEMOCRATIC PEOPLE'S REPUBLIC OF* (18 February)

Currently, no main agricultural activities are underway. Winter wheat (and winter barley), some of the early cereals in the Double-cropping programme, were planted from end-September to mid-October and the area in 2004/05 is 70 080 hectares, only marginally increased from the previous year. Spring barley and early potatoes as spring crops will be sown in March and targeted areas in 2005 are 31 500 hectares and 99 500 hectares, respectively. Wheat and barley seed were in short supply due to widespread flooding in June 2004 prior to harvesting. Some 224 tonnes of spring barley seed were recently procured through FAO for distribution to cooperative farms in 30 counties within the Cereal Bowl area on the western plains. There is an unusual lack of snow in many parts of the country in winter 2004/05, which could lead to low water levels in the reservoirs for irrigation purposes for spring and summer crops. However, in some areas there were reports of some good autumn rains in 2004.

Based on an FAO/WFP Crop and Food Supply Assessment Mission of last November, paddy rice production in 2004 is estimated at 2.37 million tonnes, 5.6 percent up from the previous year as a result of favourable weather, improved irrigation facilities in the main Cereal Bowl region and increased application of fertilizer provided through international assistance. Total cereal production in 2004/05 (2004 main season crops and 2004/05 winter/spring crops), including potatoes in cereal equivalent and production from household gardens and sloping lands, is forecast at 4.235 million tonnes (milled basis), some 3 percent over 2003 production and the best harvest over the last ten years.

Despite the grain production recovery, domestic supply is expected to fall well below the minimum food needs and the country will again have to depend on external assistance as its capacity to import commercially remains highly constrained. The import requirement in 2004/05 was estimated at 897 000 tonnes, of which commercial imports were anticipated to cover only 200 000 tonnes.

Under EMOP 10141.03, WFP seeks 504 000 tonnes of food valued at US\$202 million to feed 6.5 million of the most vulnerable North Koreans - including children, women and elderly people. In January and February 2005, WFP was able to feed all targeted beneficiaries with planned rations. Substantial new pledges will allow WFP to maintain this support through to May 2005 with the exception of oil that, due to delayed arrivals, has run out this month for beneficiaries on the west coast.

Public Distribution System (PDS) daily ration were reduced to 250 grams in January, earlier than expected. Usually the rations are reduced in March when the stocks of main harvest crops have been depleted and before the early crop harvest. The rations are the lowest since January 2001, but no increase is predicted until June. However, despite the decrease, WFP's 6.5 million beneficiaries are still able to meet their minimum food requirements provided that the pipeline is intact and distributions are timely.

KOREA, REPUBLIC OF (9 February)

Cereals currently in the ground are barley and wheat, planted towards the end of last year and due for harvest from April. Rice, the main cereal, is sown from mid-May and harvested from mid-September. The 2004 paddy output is estimated at 6.76 million tonnes, some 12 percent above the weather-affected last year, but 2 percent below the average of the previous five years. Due to change in dietary patterns, per capita consumption of rice has steadily declined from 120 kg in 1990 to 80 kg in 2004.

Cereal import in 2004/05 is estimated at about 13 million tonnes (3.9 million tonnes of wheat, 8.6 million tonnes of maize and 0.25 million tonnes of rice). The Government has agreed to almost double quotas from current 4 percent (share of imports in domestic consumption) over the next decade and make imported rice available directly to Korean consumers.

KYRGYZ REPUBLIC (9 February)

Latest reports indicate that winter cereals have been planted on 355 000 hectares, similar to last year. Winter crops are reportedly in satisfactory conditions and aggregate cereal harvest is set to match the good harvest of last year, estimated at over 1.7 million tonnes. Last year's aggregate harvest included some 1.2 million tonnes of wheat, 170 000 tonnes of barley and 320 000 tonnes of maize. Aggregate cereal import requirement for the 2004/05 marketing year is estimated at 158 000 tonnes, including 140 000 tonnes of food quality wheat and some 10 000 tonnes of rice.

LAO PEOPLE'S DEMOCRATIC REPUBLIC (9 February)

Rice is the country's principal crop accounting for 90 percent of total cropped area. Other crops grown include maize (second largest in acreage), sugarcane and groundnut. Harvesting of the wet season paddy, planted in mid-May to early July last year is completed. This crop, which is mainly grown in the Mekong River basin, accounts for some 75 percent of total paddy output. The second paddy crop, grown under irrigation in the dry season, is planted from mid-November to January and is due for gathering in April.

The 2004 paddy production is estimated at record 2.7 million tonnes, some 2 percent up from previous year's good harvest and some 15 percent above the average of previous five years due to continuous increase in the use of high yielding varieties and favourable weather. With the increased production, the country can virtually maintain its food self-sufficiency. However, the poorer sections of the population, predominantly in upland areas, have inadequate access to rice and are chronically food insecure and in need of assistance. WFP has set up emergency food distribution sites in 16 provinces to provide food aid (mainly rice).

MALAYSIA (9 February)

Malaysia was also hit by the tsunami disaster but the damage, mainly in the fishery sector, was limited compared to the worst affected countries.

The main paddy crop, sown until November last year, developed under normal rainfall conditions. The harvesting, which started in December in some areas, will be completed in April. An aggregate production of 2.18 million tonnes of paddy is estimated for 2004. This level of domestic production covers only about two thirds of the total rice consumption. The balance (0.6 million tonnes) has to be covered by imports. Imports of wheat and maize in the 2004/05 marketing year (July/June) are estimated at 1.4 million tonnes and 2.6 million tonnes, respectively.

MALDIVES (9 February)

High wave and floods caused by the tsunami of 26 December 2004 inundated all the islands and affected to varying degrees the entire population. Some 100 000 people, one-third of the population have been severely affected. Over 80 people were killed and 20 remain missing. About 10 percent of the population were displaced and about 13 000 remain displaced.

The tsunami resulted in severe damage to housing and infrastructure in the tourism and fishing sectors. Tourism is the largest industry of the country, accounting for some 30 percent of GDP, over 60 percent of the foreign exchange receipts and about 90 percent of government tax revenues. The fishery is the second leading sector in the economy and about 20 percent of the total population is dependent on fisheries as the major income earning activity. Hundreds of boats, jetties and harbours have been destroyed or damaged. Total damages to the fisheries sector have been assessed as US\$25 million while the cost of rehabilitation has been assessed as US\$15.3 million.

Agriculture, constrained by the limited availability of arable land and shortages of domestic labour, plays a minor role in the overall economy but it is an income generation activity for rural households and contributes to their food security. Losses to agriculture are severe, with an estimated 30 percent of the field plots having been completely destroyed. Perennial trees such as coconuts, breadfruits, mango etc. have been uprooted and/or are suffering from salt toxicity.

WFP has provided some 40 tonnes of food aid since the advent of the disaster. FAO made an appeal for US\$2 million through the UN Flash Appeal for emergency provision of seeds, tools and other agricultural inputs and rehabilitation of the fisheries and agricultural sectors.

MONGOLIA* (9 February)

After four years of consecutive dzud (severe winter with drought summer), the 2003/04 winter turned out to be not so harsh and severe and loss of livestock was much less. Conditions for rearing young animals were favourable in early 2004 and animal numbers in all categories increased, with the exception of camels. However, substantial losses have been forecast for the 2004/05 winter as a result of a dry summer in 2004, which affected some 60 percent of the country and recent heavy snows and much below-normal temperature during 2004/05 winter since last December.

The 2004 wheat crop, virtually the only cereal produced in the country and harvested in September, is now estimated at 135 400 tonnes, some 20 percent below the previous year, as a result of the bad dry weather in the major wheat growing regions. Potatoes and vegetables also had a poor harvest in 2004 and the outputs are estimated at 8 700 tonnes and 49 000 tonnes, respectively.

To cover domestic consumption requirements for the 2004/05 marketing year (October/September) the country will need to import an estimated 263 000 tonnes of cereals. Given that the country has a serious balance of payment problem, commercial imports will only cover part of this requirement and food aid will be necessary to meet the deficit. Dzud and drought conditions in Mongolia have substantially depleted household coping mechanisms and have resulted in an increase in poverty. Nearly 35 percent of the total

population is estimated to live below the poverty line with average family income of US\$20-US\$30 per month. The percentage of the population living below the poverty line has reached 70 percent in some urban areas.

MYANMAR (9 February)

Some 200 villages in the southern coast and relying on fishing have been hard hit by the tsunami. It is estimated that more than 60 people have died and over 3 200 people from 638 households displaced. The worst affected areas are the Laputta Township in the Ayeyawaddy Division, inhabited by poor subsistence farmers and fishing families. Direct economic damage is estimated at US\$180 000-US\$250 000. International food aid has been targeted to some 30 000 worst affected people. However, the damage to the country's rice crop by the Indian Ocean tsunami is very limited.

Harvesting of 2004 main season rice crop was completed in December last year. The secondary crop currently in the ground is due for harvest from mid-March. The 2004 paddy production is estimated at 22 million tonnes, some 4 percent below the record production last year. However, this level is still about 1 percent higher than the average of the previous five years. Wheat and maize output in 2004 are estimated at 107 000 tonnes and 574 000 tonnes, respectively. Reflecting steady increases in paddy production in the last several years, the overall cereal supply situation is satisfactory in the country.

NEPAL (9 February)

The winter wheat is currently in the ground and due for harvest in April. The weather is favourable with above-average rainfall and close to normal temperature in January. Harvesting of 2004 main season rice was completed in December and the aggregate 2004 paddy output is estimated at 4.3 million tonnes, 3.5 percent below last year, but 2 percent above the average of the previous five years. The 2004 wheat output is estimated at about 1.3 million tonnes. The total cereal import requirement in 2004/05 is estimated at 80 000 tonnes.

The nine-year armed conflict between the government's security forces and the Maoists has claimed more than 10 000 lives (more than 2 330 people were killed in 2004 alone), disrupted the security and livelihood of thousands of families, leaving the country among the poorest countries in the world with per capita GDP in 2004 only US\$230. The country's food security also affected by floods and landslides every year, with 800 000 people affected in 2004.

PAKISTAN (9 February)

The main crop currently in the ground is winter wheat, which is planted in October-November for harvest in April-May. Widespread winter rainfall since 21 January should benefit all the seasonal crops, particularly in the rainfed areas of the upper Punjab, including the districts of Attock, Chakwal, Jehlum and Rawalpindi. The recent spell of rains has also alleviated the severe drought conditions prevailing in the southern province of Balochistan, but it has also caused serious flooding in parts affecting over 30 000 people.

The 2004 wheat output is estimated at 19.4 million tonnes, some 1 percent up on last year's level and 1.6 percent above the average of the previous five years due to a higher yield. Despite the larger wheat crop, the country is expected to need for 2004/05 1.5 million tonnes of wheat imports due to low stock and growing population. The Government has set a 2005 wheat output target of 20.75 million tonnes. The latest reports indicate the 2004 paddy output at 7.4 million tonnes, 1.8 percent above the previous year. Pakistan is a major exporter of rice and the 2004/05 export is forecast at 2.1 million tonnes.

PHILIPPINES (9 February)

The main crops in the ground are currently dry season rice and maize, planted in October-December for harvest from April-May. Crop conditions are generally normal, except in northern and south-western Luzon, central and western Visayas, northern, western and southern Mindanao where crops experienced moisture deficiency.

Despite the disastrous effect of four typhoons, Philippines achieved another paddy bumper harvest in 2004 at 14.4 million tonnes, 1.7 percent higher than the year before and some 11 percent above the average of the previous five years, reflecting the increase in area cultivated to hybrid rice (230 000 ha in 2004 compared to 7 000 hectares in 2001). 2004 maize output is also expected to be higher than in 2003 at a record of 5.5 million tonnes as a result of the attractive price and the hybrid technology adoption. The Government expects rice output to reach 15.1 million tonnes and maize output 5.93 million tonnes in 2005.

SRI LANKA* (9 February)

Over 30 000 people are reported dead, some 450 000 persons are internally displaced and 91 749 houses are destroyed as a result of the tsunami. The worst affected districts are Galle, Matara, Hambantota, Ampara, Batticaloa, Tricomalee, Mullativu, Kuchaveli and Jaffna.

The hardest hit eastern and southern coastal districts are among the large paddy growing areas in the country, accounting for one-third of the production of the main Maha cropping season. Planting of the 2005 Maha paddy crop had been completed when the tsunami arrived. Waves penetrated only 0.5 km on average, impacting only downstream parts of the main agricultural areas. But in some areas such as the Galle district, salt water moved over three kilometres inland and destroyed a large number of mango and jackfruit trees. About 5 938 hectares crops are estimated damaged completely and an additional 5 000 hectares of agricultural land ready for cultivation have been affected by salt water.

Fishing in coastal areas is the major economic activity, providing direct employment to about 250 000 people. In recent years the fishery industry has emerged as a dynamic export-oriented sector, generating substantial foreign exchange earnings. Estimates indicate that 66 percent of the fishing fleet and industrial infrastructure in coastal regions have been destroyed and 10 out of 12 main fishery harbours have been devastated, causing adverse economic effects both at local and national levels. The livestock sector suffered relatively modest losses.

WFP has provided some 11 675 tonnes of food since the advent of the disaster. Funding for FAO projects totalling 16.7 million has been approved to support the rehabilitation of Sri Lanka's fishing industry.

The main crop in Sri Lanka currently is the main Maha rice crop, which is planted from October to December for harvest from March onwards. Maha planting coincides with the arrival of the north-east monsoon, the country's main rainy season. Overall rainfall and growing conditions are favourable during 2004/05 Maha season in the country and a good harvest is expected.

In 2004 Sri Lanka suffered two severe consecutive droughts, especially in Anuradhapura, Kurunegala and Puttalam. Total 2005 cereal import requirement is estimated at 1.3 million tonnes.

TAJIKISTAN (9 February)

Latest satellite imagery and other reports indicate that this year the country's reservoirs and rivers will enjoy significantly improved water levels, which is necessary for the country's extensive irrigation

system. Rainfed agriculture covers insignificant areas, while irrigated agriculture entirely depends on the snowcover in the South-east, Afghanistan and the water levels in the two main rivers (Amu and Syr) as well as the various reservoirs in the country. Last year aggregate cereal harvest totalled a record 775 000 tonnes, which was up by 40 000 tonnes on the harvest in 2003 and 231 000 tonnes up on the five-year average harvest. Last year's harvest included some 660 000 tonnes of wheat, 61 000 tonnes of barley, 21 000 tonnes of maize and 32 000 tonnes of rice. Tajikistan is a structurally food-deficit country and despite a record harvest, aggregate cereal import requirement for the 2004/05 marketing year is estimated at about 381 000 tonnes, including 103 000 tonnes in food aid.

THAILAND (9 February)

Most of the country's 400 km western coastline, including numerous islands in the Andaman Sea has been devastated by the tsunami. Some 5 300 people are reported dead and thousands more have been affected. In the worst-struck south-eastern provinces of Ranong, Phang Nga, Phuket, Krabi, Trang and Satun damage to tourism and fishing infrastructure is extensive.

In the fishery sector, some 3 000 fishing households were affected and some 5 400 fishing boats were either damaged or totally wrecked, with 75 percent being small-scale fishing boats. Damage to aquaculture floating cages is estimated at US\$32.7 million, with a total of about 1.1 million square meters (or 41 439 cages) for marine fish culture, some 30 hectares of shrimp farms and 79 hectares of shellfish being damaged. There are no major damages to crops. Some 1 300 hectares of land became covered by sea water, of which 900 hectares were damaged.

WFP has provided some 11 675 tonnes of food since the advent of the disaster.

The current main agricultural activities include planting of second season rice for harvest from May-June. Despite an ongoing drought, the sown area for this crop is forecast to reach 8.23 million rais (6.25 rais= 1 hectare), exceeding the government target of 7.52 million rais, as a result of good price of rice. Thai 100% B grade rice price was offered around US\$297 a tonne in January, up from around US\$210-US\$220 in January last year. The drought has ravaged agricultural growing areas in many provinces, with the earlier-than-usual end to the rainy season resulting in low water levels in reservoirs and dams throughout the country.

Thailand maintained its status as the world's largest rice exporter in 2004, following several bumper rice crops and high prices. Rice export volume in 2004 is estimated at a record 10 million tonnes, 32 percent higher than in the previous year, while rice export value reach US\$2.73 billion, 49 percent more than in the previous year.

Paddy production for 2004 is estimated at about 25.2 million tonnes, 7.5 percent below the record output in 2003 and 3 percent below the average of the previous five years as a result of drought. Harvest of maize is just completed and an output of 4.23 million tonnes is estimated. This is only marginally changed from last year. 2005 rice export is tentatively forecast at more than 8 million tonnes, reflecting the reduced production.

TIMOR-LESTE, DEMOCRATIC REPUBLIC OF (4 February)

The main rice and maize crops, planted in November-December, are currently emerging and will be harvested from April-May. The 2004 total cereal production is tentatively estimated at 133 000 tonnes (milled equivalent), some 22 percent above drought-affected production in the previous year. To meet cereal consumption needs, the import requirement for 2004/05 is estimated at 42 000 tonnes, which is much lower compared to the previous year's over 60 000 tonnes, reflecting the recovery in production.

According to the UNDP 2003 Human Development Report, Timor-Leste is Asia's poorest country, with more than 40 percent of the population living below the poverty line. Almost 80 percent of

inhabitants still live in rural communities depending on subsistence agriculture and facing seasonal food shortages.

TURKMENISTAN (9 February)

Latest official reports indicate that a total of 898 000 hectares have been planted with winter cereals, similar to last year. Turkmenistan is set to benefit from above average snow fall upstream in Afghanistan, Tajikistan and the Kyrgyz Republic. The rivers feeding the extensive irrigation systems in the desert country take their sources from the mentioned countries in the region. Last year the country harvested a record 2.8 million tonnes of cereals according to official reports. This aggregate included some 2.6 million tonnes of wheat, 110 000 tonnes of rice and 60 000 tonnes of barley. During the current marketing year (2004/05) Turkmenistan plans to export some 120 000 tonnes of wheat and import some 40 000 tonnes of hard wheat and 4 000 tonnes of rice.

UZBEKISTAN (9 February)

Recent reports indicate that Uzbekistan has planted just over 1.3 million hectares with winter cereals, which is similar to area planted last year. Winter cereals are the most important crops in the country and crop conditions are reported satisfactory owing to improved weather conditions and availability of purchased inputs. Above average snowfall upstream in Tajikistan, Afghanistan and the Kyrgyz Republic will ensure sufficient irrigation water to the country's extensive irrigation system. Last year aggregate cereal harvest totalled some 5.3 million tonnes, nearly 218 000 tonnes down on the record harvest in 2003 but 805 000 tonnes up on the past five-year average harvest. Last year's harvest included some 4.9 million tonnes of wheat, 100 000 tonnes of barley, 100 000 tonnes of maize and 200 000 tonnes of rice. During the 2004/05 marketing year the government plans to export some 500 000 tonnes of wheat and import just over 400 000 tonnes of wheat, rice and maize.

VIET NAM (9 February)

The current main crop activity includes the planting of winter spring rice for harvest in April to July depending on location. The aggregate 2004 paddy output is estimated at 35.5 million tonnes, some 2.8 percent above 2003 record production, reflecting favourable weather.

Viet Nam, the world's second-largest rice exporter, is expected to export 4 million tonnes in 2004/05 as a result of the higher domestic output and attractive prices. The Government is targeting to earn around US\$1 billion from rice exports in 2005.

The bird flu virus, labelled H5N1, has killed at least 19 people in Viet Nam since it broke out in early 2004 and over 40 million birds (chickens, ducks and quails) have been culled. The most recent outbreak was in late December, which affected 4 000 chickens. In early October, around 9 000 birds were destroyed in four provinces in the Mekong Delta.

CENTRAL AMERICA (including the Caribbean)

COSTA RICA (8 February)

At the beginning of January, torrential rains affected Caribbean and Northern provinces, with flooding and landslides that caused damage to infrastructure, housing and losses of banana, plantains and pineapple plantations. Harvesting of 2004 second season cereal crops is underway in Pacific provinces of Brunca (south) and Chorotega (north-west) under normal dry weather conditions. Harvesting of the important second bean crop is also well advanced and annual production for 2004 is provisionally forecast at about 11 300 tonnes, which represent a recover from previous year's low harvest of only 8 800 tonnes (due to crop losses caused by intense rains at the beginning of 2004), but still below last five-year average of approximately 14 000 tonnes. Official

sources provisionally estimate 2004 paddy production at about 233 000 tonnes, about 6 percent below previous year and 22 percent below the last five-year average of 278 000 tonnes. This decline is essentially due to the negative impact of the prolonged dry period (veranillo) in the north in August-September and to the presence of the rice mite "Steneotarsonemus spinki", responsible of more than 20 percent yield reduction in the main producing provinces of Limon and Guanacaste. Output of 2004 (white) maize crop is expected at 12 000 tonnes, about 12 percent below 2003.

The country relies on imports to satisfy domestic needs of cereals and import requirements for marketing year 2004/05 (July/June) are forecast at average levels of 550 000 tonnes of maize, 210 000 tonnes of wheat and 120 000 tonnes of rice.

CUBA* (9 February)

Harvesting of sugar cane and summer season crops is underway. Prospects are unfavourable due to dry weather coupled with excessive rains due to a succession of hurricanes during the cropping season. In particular, a prolonged and severe drought in the eastern provinces of Camaguey, Holguin and Las Tunas has reduced production of food and cash crops, especially sugarcane, and livestock. Early forecasts point to a national production of raw sugar of about 1.8 million tonnes, well below the negative record of 2.2 million tonnes obtained in 2002/03. Harvesting of the irrigated summer paddy crop has been completed and aggregate 2004 paddy output is provisionally estimated at 650 000 tonnes, below the previous year's record level, but still about last five years average. Sowing of the second season rainfed maize crop is due to start from March-April.

Wheat imports in marketing year 2004/05 (July/June) are forecast at about 1 million tonnes, while rice imports are expected to be close to previous year's level of 600 000 tonnes.

DOMINICAN REPUBLIC (8 February)

Harvesting of the second season coarse grain and bean crops is under way. The aggregate paddy production in 2004 (main and second season crops) is tentatively estimated at 580 000 tonnes, about 10 percent below previous year output. This reflects the negative impact of the abundant rains that affected the main season paddy crop during both planting, in South-West and North-East provinces in May and harvesting, in the north-eastern area of Bajo Yuna in mid-September. Recent flooding in north-eastern key producing area of Bajo Yuna has also caused some delay in planting of 2005 main spring paddy crop.

In marketing year 2004/05 (July/June), imports of wheat and maize (mostly yellow maize for the animal feed industry) are expected to be 330 000 tonnes and 900 000 tonnes respectively, similar to those of the previous year.

EL SALVADOR (9 February)

Under normal dry conditions, harvesting of 2004 second season coarse grain, paddy and bean crops has been recently completed. Despite some minor losses due to the prolonged dry period (canicula) that affected first season crops in eastern departments of Usulután, La Unión and San Miguel in June, aggregate (first and second season crops) 2004 maize output is expected to be record at almost 650 000 tonnes. Paddy crop production for 2004 is estimated at 26 000 tonnes, showing some recovery from the very poor harvest of 22 000 tonnes obtained in previous campaign but still below the last five years' average of 38 000 tonnes.

Import requirements for marketing year 2004/05 are forecast at 300 000 tonnes of maize, 200 000 of wheat and about 60 000 tonnes of rice. Food and non-food assistance continues to be delivered by the international community, targeting vulnerable groups such as children under five and expectant and nursing mothers.

GUATEMALA* (9 February)

Harvesting of the 2004 second season cereal and bean crops is virtually completed. The aggregate 2004 coarse grain output is expected to reach one million tonnes, about 10 percent below the last five-year average. The decline is mainly due to the negative effects of a prolonged dry period (canicula) in August that caused serious losses to the important first season maize crop in the departments of Retalhuleu and Suchitepéquez in the south-west and of El Progreso, Zacapa and Chiquimula in the east. The 2004 paddy production is estimated at a below average level of 35 000 tonnes due to insufficient rainfall during crop season.

Maize imports, mainly yellow, in marketing year 2004/05 (July/June) are forecast to increase from previous year's 600 000 tonnes to 750 000 tonnes, while wheat imports are expected to be stable near last year's level of 540 000 tonnes. Food assistance continues to be provided by the international community to rural families with high rates of chronic malnutrition and those financially affected by the persistent crisis of the coffee sector.

HAITI* (9 February)

Planting of the 2005 first season maize and paddy crop, to be harvested in July-August, has started in rainfed highlands of Central and Northern departments and in irrigated lowlands of the southern department of Grand Anse. Aggregate maize crop production for 2004/05 marketing year (July/June) is estimated at 220 000 tonnes, some 10 percent higher than the previous year due to increased planted area and favourable weather conditions in the main season. However, in South and North-West departments, second season maize, sorghum and bean crops were negatively affected by dry weather conditions during last months of the year. Paddy production continues to decline as a consequence of continuous reduction of plantings and yields due to increasing drainage problems and lack of maintenance of the irrigation infrastructure. Aggregate paddy output in 2004 is estimated at low 90 000 tonnes.

Import requirements for marketing year 2004/05 (July/June) are expected to be about 300 000 tonnes of wheat and 260 000 tonnes of rice. Although security environment remains uncertain and volatile, the international community continues to deliver food aid to the communities that were affected by flooding in May 2004 (the district of Mapou in South-East department, along the border with the Dominican Republic) and in September 2004 (the city of Gonaïves in the Artibonite department) and to the drought-prone North-West department.

HONDURAS* (8 February)

Harvesting of 2004/05 second season maize and bean crops is well advanced. Dry weather conditions from November to January affected first season harvest and second season plantings in south-eastern provinces of Francisco Morazán, Choluteca, Valle and El Paraiso. Consequently, aggregate maize output for 2004 is tentatively forecast at below average 450 000 tonnes. Harvesting of minor second season paddy crop is underway in the Atlantic provinces of Cortes and Colon. Despite some losses due to dry weather at the end of last year, 2004 aggregate paddy output is early estimated at above average 29 200 tonnes as a consequence of the good production obtained in the first season 'de primera' paddy crop.

Wheat and maize (mainly white) imports in marketing year 2004/05 (July/June) are forecast at 200 000 tonnes and 250 000 tonnes, very similar to previous year's volumes. Food assistance continues to be provided by the international community, targeting in particular women, children under the age of five and elderly people in the drought-affected municipalities.

MEXICO (4 February)

Harvesting of the 2004 rainfed summer maize crop, which accounts for almost 85 percent of total production, is well advanced. Early forecast points to an aggregate 2004/05 marketing year maize output (winter and summer) of 22.5 million tonnes, about 9 percent higher than last year reflecting favourable weather conditions during the growing season and record plantings in Sinaloa state as a consequence of the government support programme for white maize. Harvesting of 2004 summer sorghum crop is still underway and prospects for the output are good, especially in key producing state of Tamaulipas where yields are expected to be well above normal level. Sorghum 2004 aggregate output (winter and summer) is provisionally estimated at record 7.1 million tonnes. Planting of 2005 winter wheat and maize crops, to be harvested from April-May, is under way and planting intentions point to an area of 1.1 million hectares for maize, similar to 2004 winter campaign, while an increase of about 10 percent is expected for wheat.

Wheat imports for 2004/05 marketing year (July/June) are expected to reach the record level of 4 million tonnes, due to the 2004 low production of 2.45 million tonnes (compared to last five years average of about 3 million tonnes) as a consequence of inadequate water supplies in the main producing states of Sonora and Baja California, which resulted in a reduction in plantings of about 15 percent of the important 2003/04 winter wheat crop.

NICARAGUA* (4 February)

Harvesting of the 2004/05 second season "postrera" maize and bean crops is virtually completed, while harvesting of the third "apante" crop, especially important for beans in the departments on the Atlantic coast, is due to start in March. In aggregate, 2004/05 marketing year maize output is expected to be about 430 000 tonnes, about 25 percent below the 2003/04 record production of 580 000 tonnes. This result is essentially the consequence of the prolonged dry period (veranillo) in August that caused about 30 percent loss of planted area during the important first season maize crop in the departments of León, Chinandega, Madriz and Matagalpa. Production of beans, an important staple crop in local diet, is tentatively forecast to be similar to previous year record of 225 000 tonnes. The coffee sector, the first agricultural foreign exchange earner, is still facing a period of crisis. Poor yields are expected due to insufficient financial resources for maintenance to plantations and 2004 production is estimated at low 46 000 tonnes, about 45 percent below the output of 82 000 tonnes obtained in 2003.

Import requirements for marketing year 2004/05 are forecast at average 125 000 tonnes of wheat and 110 000 tonnes of rice, while maize imports are forecast at high 120 000 tonnes due to reduced domestic production. Food assistance from the international community continues to be delivered in northern and central departments of Segovia, Jinotega and Matagalpa, particularly through school feeding and food-for-work programmes.

SOUTH AMERICA

ARGENTINA (9 February)

Harvesting of the 2004 wheat crop has been recently completed and production is officially early estimated at 16 million tonnes, higher than last five years average of about 14.8 million tonnes. This reflects the 5 percent increase in area planted and positive effects of favourable weather conditions on yields. Planting of 2005 maize crop has been completed at the beginning of January and planted area is estimated at 2.5 million hectares, with an increase of about 9 percent compared to 2004. Dry weather is affecting maize crop in southwest Buenos Aires and north Cordoba, where some damaged areas have already been utilized for animal feed. If favourable weather conditions resume, 2005 maize crop production is expected to be between 17 and 18 million tonnes, just below the record output obtained in 1998. Harvesting of 2005 paddy crop has started in the main producing

provinces of Corrientes and Entre Rios. The crop is reported in general good conditions and early forecast point to a production of about 0.8 million tonnes.

BOLIVIA (7 February)

With some delay due to limited soil moisture, planting of summer 2004/05 cereal crops has been completed by the end of December in the main producing departments of Santa Cruz and Chuquisaca. Crops are reported in general good conditions and their harvest is expected from April. At the beginning of January, with the arrival of first precipitations, planting of maize crop has also started in the southeast lowlands of El Chaco department where seeds availability is reported to be the main concern due to the negative impact of the prolonged drought that affected last year's production. By the end of December, the international community has started to provide emergency food aid to drought affected families of El Chaco.

Wheat imports in marketing year 2004/05 (July/June) are forecast at about 280 000 tonnes, with a slight decline compared to the previous year's volume due to the good output obtained.

BRAZIL (9 February)

Harvesting of the 2004 winter wheat crop has been recently completed and the output is officially estimated at 5.8 million tonnes, similar to the record level achieved the previous year. Dry weather is negatively affecting 2005 first season (summer) maize crop in main growing southern state of Rio Grande do Sul, where an increase in production of about 40 percent was expected. Maize crop harvest is about to start and, due to reduced rains, the official forecast of an output of 32.5 million tonnes, 4.6 percent higher than in the same season of 2004, may need to be somehow downward revised. Harvesting of 2005 paddy crop in Centre and South areas is about to start and production early forecast point to a result of 11 million tonnes below last year's record output.

CHILE (8 February)

Under favourable weather conditions, harvesting of the 2004/05 wheat crop is under way in southern producing areas and the output is forecast at 1.9 million tonnes, above last year's record level of 1.8 million tonnes. Farmers are currently facing commercialization problems because of low international prices of wheat that in several cases only partially cover the production costs. Harvesting of 2005 main maize crop, planted from September to December, is due to start from March and, if favourable growing conditions persist, it is expected to obtain a record output of 1.3 million tonnes.

As a consequence of the good domestic production, wheat imports requirements in marketing year 2004/05 (July/June) are likely to decline compared to previous years and they are forecast at about 300 000 tonnes. On the contrary, despite the possibility of a record production, maize import requirement in marketing year 2004/05 (July/June) are expected to continue at average level of 900 000 tonnes due to the growing demand of the feed industry (essentially poultry and pigs).

COLOMBIA (14 February)

During the second week of February, torrential rains have caused loss of human lives and damaged infrastructures and housing in northeast and central departments of Norte de Santander, Santander and Tolima. The national meteorological service (IDEAM) alerts that precipitations may continue in the following days and move toward western departments. Although an official evaluation of agricultural damages is not yet available, production of 2004/05 second season cereal crops, whose harvest is underway, is likely to be affected by recent unfavourable weather. Previous official forecast of record production of aggregate maize, sorghum and paddy output for 2004, due to the expansion of the area planted, may need a downward revision from expected volumes of 1.44 million tonnes for maize, 285 000 tonnes for sorghum and 2.6 million tonnes for paddy.

Cereal import requirements for marketing year 2004/05 (July/June) are forecast to be similar to the previous year's level with 1.2 million tonnes of wheat and 2 million tonnes of maize. The international community continues to provide food assistance to the internally displaced population, victims of the persistent civil strife affecting the country.

ECUADOR (9 February)

Absence of precipitation is causing losses to 2005 winter paddy and yellow maize crops that were early planted at the beginning of January in key producing coastal departments of Los Rios, Guayas and El Oro. Consequently, the bulk of planting activities has been delayed and the harvest of paddy crop is likely to have a late start at the end of May, while the bulk of maize crop harvest may take place in August-September and not in June-July as usual.

The country is self-sufficient in rice, but every year between 400 000 and 450 000 tonnes of wheat, an important staple food in local diet, are required commercially in order to satisfy domestic demand. In addition, maize import requirements for marketing year 2004/05 are forecast at 350 000 tonnes.

GUYANA (9 February)

By mid-January, torrential rains caused severe flooding in the capital and along the East coast, especially in Region 3 (Essequibo Islands/West), Region 4 (Demerara/Mahaica) and Region 5 (Mahaica/Berbice). Flooding affected about 200 000 people, almost 30 percent of Guyana's population, and it is considered as the largest disaster that hit the country in the last century. The intensity of the crisis has had a serious impact on the normal coping mechanisms of families and communities, as many of the worst affected areas are also among the poorest. Although an official assessment of agricultural losses is not yet available, it is evident that farmers have lost much of their means of production, crops and livestock and the access to food is still a major challenge. Farmers are currently pumping out water to dry rice fields before the harvest season begins at the end of February to avoid the complete loss of the spring paddy crop.

Wheat is an important component of local diet (second only to rice) and it is entirely imported; import requirements in marketing year 2004/05 are forecast at average level of 40 000 tonnes. Rice exports in 2004 are estimated at about 230 000 tonnes as in 2003, but the losses due to flooding may significantly reduce that volume. The international community is currently providing emergency food rations to families in flood-hit areas.

PARAGUAY (4 February)

In the areas where soybean crop has already been harvested, planting of 2005 first season maize crop has started. Maize planting intentions are about 250 000 hectares, slightly above the acreage of the same season in 2004. Harvesting of paddy crop is underway in the main producing southern departments of Itapúa and Caazapá. Production for 2004 is forecast at 130 000 tonnes, about 13 000 tonnes more than previous year reflecting good yields. Rice mills are paying paddy at about 50 percent less than the price of previous year, with serious concern for producers that, in several cases, are not able to fully cover their production costs.

PERU (8 February)

Planting of 2005 yellow maize crop is underway in the departments of Cajamarca, Apurímac and Cusco, while the bulk of the planting of white maize crop has already been completed. Planting of 2005 paddy is about to start in northern departments of Piura and Lambayeque, where precipitations are highly needed in order to restore the adequate level of water in reservoirs of Poechos and Tinajones. Water shortages are reported also in water reservoir of Condorama in southern department of Arequipa. Cereal production in 2004 has been affected by the severe dry weather conditions that prevailed in the north of the country at the

beginning of the year. Paddy production in 2004 is estimated at 1.8 million tonnes, well below the record output of more than 2.1 million tonnes obtained in 2003 and 2002. The low level of northern water reservoirs from January to March 2004 reduced plantings of about 50 000 hectares in key producing departments of Lambayeque and Piura, that was only partially compensated by an increase of 22 000 hectares planted in the Amazonian department of San Martin. A reduction of about 13 percent compared to previous year is also expected for the aggregate (yellow and white) 2004 maize production, with major losses in La Libertad and Ancash departments.

Wheat and maize imports in marketing year 2005 (January/December) are forecast at about 1.4 and 1 million tonnes respectively, with a slight increase compared with the previous year due to 2004 reduced domestic production and to the increasing domestic demand.

URUGUAY (8 February)

Harvesting of the 2004 summer paddy and maize crops is scheduled from March and yields are expected to be lower than average due to the limited precipitations during December and January. Paddy output is expected at high 1.3 million tonnes, guaranteeing an exportable surplus of about 800 000 tonnes. Despite dry weather conditions during the sowing period (November/December) that prevented to reach the planned goal of 200 000 hectares planted, this excellent paddy output reflects the increase of about 22 percent in the area planted as a response to higher international prices. Early forecasts point to a high maize crop production of about 260 000 tonnes, mainly due to a 50 percent increase in the area planted in response to high domestic prices and representing the highest acreage in last ten years. Harvesting of the 2004 winter wheat and barley crops has been completed and official forecasts point to bumper harvests for both crops. In fact, wheat crop output is estimated at high 530 000 tonnes, due to more than 50 percent increase in planting area, while barley crop output is estimated at record 406 000 tonnes, due to 26 percent increase in plantings as well as record yields.

VENEZUELA (15 February)

During the second week of February, torrential precipitations have hit several departments of Venezuela, causing river overflows and mudslides with damage to housing and infrastructure. The Government has declared a state of emergency in seven coastal states of Falcón, Yaracuy, Carabobo Aragua, Vargas, Miranda and Capital Federal, but heavy rains have also affected the southern states of Mérida, Táchira and Zulia on the border with Colombia. An evaluation of the crop damage is not yet available, but losses are expected to food and cash crops, such as vegetables, that are typically cultivated by small farmers in the affected areas, with negative consequences on food security for the local population. However, damages to major staple food crops such as maize, sorghum and rice are likely to be limited since the main growing states of Guarico, Portuguesa and Cojedes were marginally affected by the recent excessive rains. In addition, harvesting of the main summer crop, accounting for about 80 percent of annual production, was already completed by the end of 2004.

Harvesting of the small winter maize crop, planted from October to November, is due to start from April. An average annual maize output of about 1.5 million tonnes is estimated for 2004 and this result is mainly due to the positive impact on yields of favourable weather conditions in the main growing area of Portuguesa and Guarico. 2004 paddy production is provisionally estimated at about 750 000 tonnes, above the average production of about 720 000 tonnes.

The country entirely relies on imports to satisfy domestic needs of wheat and import requirements for marketing year 2004/05 (July/June) are forecast at average level of 1.4 million tonnes. At the same time, maize import requirements (mostly yellow maize) are forecast at 700 000 tonnes.

EUROPE

EU (9 February)

Prospects for the winter cereal crops planted last autumn are good reflecting generally favourable weather throughout the winter so far. The main exception is in southern Spain and Portugal where persisting dry weather has led to a continuing reduction in moisture supplies for winter grains. In central and eastern parts of the region, which are prone to winterkill, snowcover has generally been sufficient to protect crops from any potentially damaging low temperatures.

With the re-introduction of the 10 percent set-aside requirement in 2005, from 5 percent in 2004, the overall cereal area in the EU is expected to decrease for the 2005 harvest. However, early indications suggest the reduction may be 1 to 2 percent. Significant area reductions forecast for durum wheat, rye and maize could be partially offset by a larger soft wheat area. Plantings of barley are expected to remain unaltered. Significant increases in wheat area are expected in France, Germany, Italy and Spain, which would more than offset reductions in several other countries, including Denmark, Hungary and Sweden.

Whatever the final area of cereals may be for the 2005 harvest, which will be uncertain until completion of the spring planting later this year, the percent reduction in output stands to be significantly larger on the assumption that yields will return to average after the bumper levels achieved last year. Based on the current area forecasts, the aggregate cereal output in EU in 2005 could be 5 to 8 percent less than the previous year's harvest.

ALBANIA (9 February)

Cereal output in 2004 is estimated at about 520 000 tonnes, close to the average of the past five years. Weather conditions during the season were generally favourable. Wheat is estimated to have accounted for about 285 000 tonnes of the total output. The cereal import requirement for 2004/05 is estimated at 380 000 tonnes, about the average of the past five years and most of this is expected to be wheat.

Early prospects for the 2005 winter wheat crop just planted are generally satisfactory despite wetter than normal conditions reported in late 2004. The area of wheat sown has changed little from year-to-year during the past few years and is expected to remain again about 100 000 hectares in 2005.

WFP continues to provide food assistance to the most vulnerable of the population, focusing on the areas of social-sector assistance; communal forestry and pasture management and community asset building through food-for-work projects.

BELARUS (9 February)

Latest reports indicate that winter cereals have been planted on similar areas and weather indicators point to a good crop this year. Winterkill is usually rather significant and lack of sufficient soil moisture for spring crops tend to compromise spring and summer crops. This year the prospects are for a good cereal harvest owing to above average precipitation and protective snow cover. Last year Belarus harvested some 5.6 million tonnes of cereals compared with 4.9 million tonnes in 2003. The harvest in 2004 included some 1.86 million tonnes of barley, just over 1 million tonnes of wheat and some 1.7 million tonnes of rye. Aggregate cereal imports for the current (2004/05) marketing year is estimated at 455 000 tonnes, compared with 610 000 tonnes the previous year. Belarus is set to export some 240 000 tonnes of rye during the 2004/05 marketing year.

BOSNIA-HERZEGOVINA (9 February)

Latest reports indicate that winter cereals, mainly wheat and barley, are in satisfactory conditions. Summer crops, mainly maize, are the most important in the country's cropping calendar. Last year a

record cereal harvest of 1.56 million tonnes was collected, which is some half a million tonne up on the harvest in 2003. Last year's cereal harvest includes some 250 000 tonnes of wheat, 65 000 tonnes of barley and 1.2 million tonnes of maize. Despite a record harvest last year, aggregate cereal import requirement for the 2004/05 marketing year is estimated at 330 000 tonnes, including 50 000 tonnes in food aid requirement.

BULGARIA (7 February)

The early outlook points to another good wheat crop in 2005. Winter wheat plantings are reported to have risen to almost 1.1 million hectares from about 950 000 hectares last year and weather conditions have been favourable throughout the autumn and winter so far. However, assuming yields return to closer to the five-year average, after the bumper levels in 2004, output is expected to remain similar to last year's level at about 4 million tonnes.

CROATIA (9 February)

Latest reports show that winter cereal crops, mainly wheat and barley, are in good conditions and areas planted are similar to the average of the past few years. Provided that favourable weather conditions persist over spring and early summer, a repeat of last year's good harvest is a real possibility. Last year aggregate cereal harvest was estimated at about 3.3 million tonnes, which is some 800 000 tonnes up on 2003. Aggregate cereal export for the 2004/05 marketing year is estimated at 140 000 tonnes and imports are estimated at about 87 000 tonnes.

ESTONIA (9 February)

Winter cereals have been planted on 33 000 hectares, similar to area planted in the past several years. Winter cereals account for about 13 percent of the total cereal areas. Cereal production had been continuously declining over the past decade but seem to have stabilised over the past couple of years. Prospects are for a similar cereal harvest to last year's, which was estimated at about 515 000 tonnes. This aggregate included some 150 000 tonnes of wheat, 240 000 tonnes of barley and 40 000 tonnes of rye. Aggregate cereal import requirement for the 2004/05 marketing year is estimated at about 258 000 tonnes including 136 000 tonnes of wheat, 20 000 tonnes of rye and 60 000 tonnes of maize.

LATVIA (9 February)

Latest reports indicate that 144 000 hectares have been planted with winter cereals similar to the past few years. Winter cereals are reportedly in satisfactory conditions. Provided that favourable weather conditions prevail in spring and early summer, Latvia is set to harvest some 980 000 tonnes of cereals, about 60 000 tonnes up on 2004 and the five-year average harvests. Last year's harvest included some 380 000 tonnes of wheat, 270 000 tonnes of barley and 150 000 tonnes of rye. Aggregate cereal imports for the 2004/05 marketing year is estimated at 161 000 tonnes and exports are estimated at 52 000 tonnes.

LITHUANIA (9 February)

Winter cereals are reportedly in satisfactory conditions, which have been planted on 400 000 hectares, similar to planted area in the past five years. Winter and spring crops are equally important and aggregate cereal harvest in 2004 was estimated at 2.3 million tonnes, some 180 000 tonnes down on the year before. Last year's harvest included some 790 000 tonnes of wheat, 970 000 tonnes of barley and 420 000 tonnes of rye. Aggregate cereal exports (mainly wheat) for the 2004/05 marketing year is estimated at 250 000 tonnes and imports for the same period is estimated at 264 000 tonnes.

MOLDOVA (9 February)

Favourable weather conditions and improved access to purchased inputs have prompted farmers to match last year's winter cereal areas, estimated at 328 000 hectares. Winter cereals are reportedly in satisfactory conditions and prospects are for a repeat of last year's good harvest. Aggregate cereal

harvest in 2004 amounted to some 2.5 million tonnes, some 166 000 tonnes lower than the record harvest gathered in 2002. Last year's harvest included some 830 000 tonnes of wheat, 190 000 tonnes of barley and 1.4 million tonnes of maize. Favourable weather conditions and significantly higher than average yields contributed to last year's good harvest. Domestic cereal requirement is estimated at about 2.2 million tonnes per year. Aggregate cereal exports, wheat and maize, during the 2004/05 marketing year is forecast at 220 000 tonnes. During 2003/04 marketing year cereal imports totalled some 259 000 tonnes following crop failure.

ROMANIA (7 February)

Prospects are favourable for the 2005 winter wheat crop. Weather conditions have been generally ideal since planting last autumn. Adequate soil moisture levels ensured good establishment of crops and heavy snowfalls this winter have kept crops protected from potential frost damage. The area planted with wheat is officially estimated at 2.2 million hectares, about 13 percent above the area harvested last year. However, assuming normal weather conditions until harvest, yields would drop from the exceptionally high levels attained last year and thus, despite the area increase, output could drop from the previous year's bumper level of 7.6 million tonnes to about 5.5 million tonnes.

RUSSIAN FEDERATION (8 February)

Latest reports indicate that winter cereals have been planted on about 14.3 million hectares, some 3 million hectares up on last year. Heavy snow cover has provided good protection for winter crops, which usually suffer heavy losses due to harsh weather conditions. Not only will the protective snow cover reduce winterkill but will also provide good soil moisture for spring crops. Overall a good cereal harvest for this year is foreseen. However, much will depend on early spring weather conditions when much of the snow melts and crops are still frost prone. In 2004 the Russian Federation produced more than 77 million tonnes of grains compared with some 66.2 million tonnes in 2003. Last year's harvest included some 45.3 million tonnes of wheat, 17.2 million tonnes of barley, 3.5 million tonnes of maize and 2.9 million tonnes of rye. Aggregate cereal exports for the 2004/05 marketing year is forecast at more than 7.7 million tonnes. Aggregate cereal imports in the same period is estimated at 3.2 million tonnes of mainly food-quality wheat and rye.

Military operations and civil strife in Chechnya continue to disrupt social and economic activities. The conflict has displaced more than 300 000 people, 100 000 of whom live in the neighbouring Ingushetia. Under the current 18-month Emergency Operation Programme (EMOP), which began in January 2004, WFP will assist some 259 000 most vulnerable population in Chechnya and Ingushetia with 47 882 tonnes of food over a period of 18 months.

SERBIA AND MONTENEGRO (9 February)

Latest reports indicate that winter cereals, mainly wheat and barley, have been planted on similar areas to last year and crops are in satisfactory conditions. Last year a record harvest was collected, now estimated at 9.7 million tonnes compared with 5.5 million tonnes in 2003. Provided that favourable weather conditions prevail, a repeat of last year's harvest is a real possibility. Last year's harvest included some 2.7 million tonnes of wheat, 6.5 million tonnes of maize and 340 000 tonnes of barley. Aggregate cereal exports for the 2004/05 marketing year is estimated at 710 000 tonnes and imports for the same period is estimated at 313 000 tonnes.

THE FORMER YUGOSLAV REPUBLIC OF MACEDONIA (4 February)

Cereal output in 2004 was well above the average of the past five years, mainly due to favourable weather conditions. Output of wheat, the main cereal grown, was estimated at about 370 000 tonnes. As a result, imports of wheat in the 2004/05 (July/June) marketing year are expected to return to a normal level of about 65 000 tonnes, after rising to over 100 000 tonnes in the previous year.

Estimates put the area of winter cereals (mostly wheat and barley) for the harvest in 2005 at about 160 000 hectares, slightly above average. After a slow start, official reports in late November indicated that planting operations were about 90 percent complete with the remaining 10 percent expected to be planted by 10 December. Moisture conditions were reported to be satisfactory for emergence and establishment of the crops. Assuming normal weather for the rest of the season and average yields, the winter cereal crop should amount to about 420 000 tonnes, slightly above the recent average.

UKRAINE (9 February)

Winter cereals have been planted on about 7.1 million hectares, similar to the past five year average planted area but up by about one million hectare on last year. Good precipitation and protective snow cover may result in a repeat of last year's record harvest. In addition, Ukraine plans to increase areas planted with spring cereals and the heavy snowfall may provide sufficient soil moisture to ensure good crop growth in spring and summer. Last year Ukraine harvested a record 41 million tonnes of grains, compared with just over 20 million tonnes harvested in 2003. The harvest in 2004 included some 17.5 million tonnes of wheat, 11 million tonnes of barley and nearly 9 million tonnes of maize. High and rising regional and domestic demand as well as relatively high returns from maize have prompted farmers to increase maize production from just over 3 million tonnes in 2002 to nearly 9 million tonnes in 2004.

Aggregate cereal exports during the 2004/05 marketing year are tentatively forecast at nearly 9 million tonnes, which includes some 4 million tonnes of wheat, 3.5 million tonnes of barley and 1.4 million tonnes of maize. In 2003/04, for the first time in the past decade, became a net cereal importer with imports totalling some 3.9 million tonnes following crop failure in 2003.

NORTH AMERICA

CANADA (9 February)

Agriculture and Agri-Food Canada reported their outlook for the 2005/06 crop seeding in early February. Early indications point to an increase in the overall wheat area at the expense of reduced barley and oilseed areas but also with some fallow land being planted. The soft wheat area is expected to increase by about 4 percent and a marginal increase in the durum area is also forecast. However, a return to average yields is expected after last year's high levels and the aggregate wheat output in 2005 is tentatively forecast to fall by about 6 percent to 24.4 million tonnes. Production of coarse grains is also expected to decrease somewhat in 2005 by about 2 percent to 26.1 million tonnes. The reduction is expected as the combined result of reduced barley plantings and a return to average yields after bumper levels last year for all coarse grains in general.

UNITED STATES (7 February)

The winter wheat area for the 2005 harvest is officially estimated at 16.8 million hectares, 4 percent down from the previous year's area. The bulk of the reduction is in the Soft Red Winter wheat area, which declined by 19 percent, to the smallest area on record, mostly because of adverse wet weather at planting time. The Hard Red Winter wheat area is down by just 1 percent. Conditions for crops have been generally favourable so far. Cold temperatures have prevailed in the northern Great Plains but crops there are protected by a good cover of snow. By contrast, in the central and southern plains, milder temperatures have reduced snowcover and reduced winter hardiness of dormant crops leaving them somewhat more vulnerable should very low temperatures return. At this stage, with little change expected in the spring wheat area and assuming a normal rate of winterkill, the aggregate wheat area for the 2005 harvest is expected to decline from the previous year. If yields are about the average of the past five years then the aggregate output could also be expected to decline somewhat from the 58.7 million tonnes crop in 2004.

OCEANIA

AUSTRALIA (4 February)

The recently completed 2004 wheat harvest is officially estimated at 20.4 million tonnes, about 20 percent down from the previous year's record harvest and slightly below the five-year average. Although the planted area was above average, yields were curtailed by generally dry conditions combined with hot temperatures in several major producing areas. The arrival of heavy rains in some eastern parts in December, especially in New South Wales, was too late to benefit the wheat crop and only added to disrupt the harvest and downgrade the quality of some crops. Barley output was similarly affected, with output falling to a below-average 6.5 million tonnes, from 8.7 million tonnes in the previous year.

Despite the lack of rainfall for the growing stages of 2004 winter crop season, the main summer coarse grain crop zones benefited from timely planting rains. The combined sorghum and maize area is estimated to have risen by about 24 percent to almost 800 000 hectares.

**ESTIMATED CEREAL IMPORT REQUIREMENTS OF LOW-INCOME FOOD-DEFICIT COUNTRIES 1/
a) 2004/05 or 2005 estimates (in thousand tonnes)**

COUNTRY	Marketing year	2003/04 or 2004			2004/05 or 2005			
		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
AFRICA		31 179.1	3 011.0	34 190.1	35 821.5	10 670.3	971.9	9 698.4
Northern Africa		14 867.0	20.1	14 887.1	15 147.0	6 824.0	1.8	6 822.2
Egypt	July/June	11 599.0	20.1	11 619.1	12 000.0	5 394.5	1.8	5 392.7
Morocco	July/June	3 268.0	0.0	3 268.0	3 147.0	1 429.5	0.0	1 429.5
Eastern Africa		3 520.1	1 464.4	4 984.5	5 581.0	1 161.2	389.3	771.9
Burundi	Jan./Dec.	40.5	55.5	96.0	82.0	12.5	12.5	0.0
Comoros	Jan./Dec.	33.0	0.0	33.0	33.0	0.0	0.0	0.0
Djibouti	Jan./Dec.	58.1	4.9	63.0	63.0	0.0	0.0	0.0
Eritrea	Jan./Dec.	58.5	249.5	308.0	422.0	56.4	56.4	0.0
Ethiopia	Jan./Dec.	43.7	546.2	589.9	230.0	71.8	71.8	0.0
Kenya	Oct./Sept.	1 192.6	71.5	1 264.1	2 000.0	379.3	84.3	295.0
Rwanda	Jan./Dec.	196.7	27.3	224.0	229.0	8.0	7.1	0.9
Somalia	Aug./July	245.4	22.6	268.0	304.0	41.1	40.1	1.0
Sudan	Nov./Oct.	1 075.0	222.8	1 297.8	1 326.0	209.3	68.7	140.6
Tanzania	June/May	483.2	134.3	617.5	632.0	344.5	10.1	334.4
Uganda	Jan./Dec.	93.4	129.8	223.2	260.0	38.3	38.3	0.0
Southern Africa		2 653.4	1 036.2	3 689.6	4 232.0	2 295.1	347.0	1 948.1
Angola	April/March	618.0	218.8	836.8	820.0	682.9	75.8	607.1
Lesotho	April/March	221.5	19.0	240.5	352.0	156.2	5.6	150.6
Madagascar	April/March	329.2	38.6	367.8	375.0	167.3	39.8	127.5
Malawi	April/March	84.6	14.5	99.1	408.0	163.2	25.5	137.7
Mozambique	April/March	546.4	274.8	821.2	785.0	600.5	64.8	535.7
Swaziland	May/April	111.5	15.5	127.0	132.0	48.2	0.8	47.4
Zambia	May/April	232.1	65.2	297.3	70.0	71.0	20.0	51.0
Zimbabwe	April/March	510.1	389.8	899.9	1 290.0	405.8	114.7	291.1
Western Africa		8 987.6	398.9	9 386.5	9 559.6	387.8	231.6	156.2
Coastal Countries		6 870.3	206.2	7 076.5	6 823.4	126.3	125.1	1.2
Benin	Jan./Dec.	189.7	13.3	203.0	148.0	5.1	5.1	0.0
Côte d'Ivoire	Jan./Dec.	1 222.3	25.5	1 247.8	1 271.4	12.0	12.0	0.0
Ghana	Jan./Dec.	686.9	54.3	741.2	751.0	51.1	51.1	0.0
Guinea	Jan./Dec.	351.8	11.3	363.1	370.0	0.6	0.6	0.0
Liberia	Jan./Dec.	130.0	71.7	201.7	210.0	33.0	33.0	0.0
Nigeria	Jan./Dec.	3 930.0	0.0	3 930.0	3 680.0	10.5	10.5	0.0
Sierra Leone	Jan./Dec.	249.6	30.1	279.7	288.0	14.0	12.8	1.2
Togo	Jan./Dec.	110.0	0.0	110.0	105.0	0.0	0.0	0.0
Sahelian Countries		2 117.3	192.7	2 310.0	2 736.2	261.5	106.5	155.0
Burkina faso	Nov./Oct.	140.2	24.3	164.5	243.4	24.1	24.1	0.0
Cape Verde	Nov./Oct.	38.6	33.5	72.1	100.5	27.7	27.7	0.0
Chad	Nov./Oct.	80.0	32.3	112.3	109.3	18.8	18.8	0.0
Gambia	Nov./Oct.	116.7	4.1	120.8	141.3	0.0	0.0	0.0
Guinea Bissau	Nov./Oct.	43.8	10.3	54.1	74.1	10.1	0.1	10.0
Mali	Nov./Oct.	222.8	0.9	223.7	265.2	0.2	0.2	0.0
Mauritania	Nov./Oct.	225.9	52.9	278.8	346.6	47.3	11.6	35.7
Niger	Nov./Oct.	336.2	20.6	356.8	504.0	9.6	9.6	0.0
Senegal	Nov./Oct.	913.1	13.8	926.9	951.8	123.7	14.4	109.3
Central Africa		1 151.0	91.4	1 242.4	1 301.9	2.2	2.2	0.0
Cameroon	Jan./Dec.	472.0	28.0	500.0	505.0	0.0	0.0	0.0
Cent.Afr.Rep.	Jan./Dec.	41.3	2.7	44.0	46.5	0.0	0.0	0.0
Congo, Dem.Rep.	Jan./Dec.	372.6	54.2	426.8	480.0	0.0	0.0	0.0
Congo, Rep.	Jan./Dec.	238.4	3.6	242.0	242.0	2.2	2.2	0.0
Eq. Guinea	Jan./Dec.	17.7	0.0	17.7	16.0	0.0	0.0	0.0
Sao Tome	Jan./Dec.	9.0	2.9	11.9	12.4	0.0	0.0	0.0

ESTIMATED CEREAL IMPORT REQUIREMENTS OF LOW-INCOME FOOD-DEFICIT COUNTRIES 1/
a) 2004/05 or 2005 estimates (in thousand tonnes)

COUNTRY	Marketing year	2003/04 or 2004			2004/05 or 2005			
		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
ASIA/NEAR EAST		38 086.6	2 732.3	40 818.9	47 446.0	21 104.6	1 715.1	19 389.5
Afghanistan	July/June	346.9	159.1	506.0	1 733.0	130.7	72.5	58.2
Armenia	July/June	126.0	42.0	168.0	169.0	22.1	0.1	22.0
Azerbaijan	July/June	760.0	6.0	766.0	980.0	794.1	62.3	731.8
Bangladesh	July/June	2 669.0	262.6	2 931.6	2 807.0	2 070.7	260.7	1 810.0
Bhutan	July/June	56.7	3.5	60.2	66.0	0.3	0.3	0.0
Cambodia	Jan./Dec.	31.6	28.2	59.8	60.0	0.0	0.0	0.0
China	July/June	11 635.2	21.8	11 657.0	16 320.0	6 960.4	23.4	6 937.0
Georgia	July/June	445.0	82.0	527.0	575.0	519.1	57.7	461.4
India	April/March	218.1	36.5	254.6	250.0	92.1	79.6	12.5
Indonesia	April/March	8 121.1	219.9	8 341.0	6 741.0	4 035.2	54.3	3 980.9
Iraq	July/June	2 603.2	666.8	3 270.0	3 730.0	2 241.6	889.2	1 352.4
Korea, D.P.R.	Nov./Oct.	388.6	692.0	1 080.6	897.0	215.0	55.2	159.8
Kyrgyz Republic	July/June	78.0	1.0	79.0	158.0	49.1	0.0	49.1
Lao, P.D.R.	Jan./Dec.	8.8	8.8	17.6	17.0	0.0	0.0	0.0
Maldives	Jan./Dec.	32.5	7.5	40.0	40.0	0.0	0.0	0.0
Mongolia	Oct./Sept.	199.3	48.7	248.0	263.0	35.2	25.0	10.2
Nepal	July/June	72.2	8.8	81.0	80.0	2.2	2.2	0.0
Pakistan	May/April	386.9	14.0	400.9	1 700.0	922.6	7.7	914.9
Philippines	July/June	4 062.0	106.1	4 168.1	4 176.0	1 688.0	48.2	1 639.8
Sri Lanka	Jan./Dec.	1 267.8	33.5	1 301.3	1 274.0	33.0	0.0	33.0
Syria	July/June	1 424.9	7.3	1 432.2	1 605.0	1 000.7	3.3	997.4
Tajikistan	July/June	278.0	85.0	363.0	381.0	122.4	10.9	111.5
Timor-Leste	July/June	62.0	0.0	62.0	42.0	0.0	0.0	0.0
Turkmenistan	July/June	34.0	0.0	34.0	44.0	0.0	0.0	0.0
Uzbekistan	July/June	268.0	82.0	350.0	408.0	107.6	0.0	107.6
Yemen	Jan./Dec.	2 510.8	109.2	2 620.0	2 930.0	62.5	62.5	0.0
CENTRAL AMERICA		1 291.7	156.3	1 448.0	1 545.0	770.1	278.0	492.1
Haiti	July/June	520.1	56.9	577.0	625.0	281.6	166.6	115.0
Honduras	July/June	495.9	64.4	560.3	565.0	305.2	49.9	255.3
Nicaragua	July/June	275.7	35.0	310.7	355.0	183.3	61.5	121.8
SOUTH AMERICA		867.4	5.3	872.7	906.0	391.4	77.0	314.4
Ecuador	July/June	867.4	5.3	872.7	906.0	391.4	77.0	314.4
OCEANIA		407.6	0.0	407.6	419.2	0.0	0.0	0.0
Kiribati	Jan./Dec.	8.6	0.0	8.6	8.7	0.0	0.0	0.0
Papua New Guinea	Jan./Dec.	335.5	0.0	335.5	346.0	0.0	0.0	0.0
Samoa	Jan./Dec.	15.5	0.0	15.5	15.5	0.0	0.0	0.0
Solomon Isl.	Jan./Dec.	29.5	0.0	29.5	29.5	0.0	0.0	0.0
Tonga	Jan./Dec.	6.4	0.0	6.4	6.4	0.0	0.0	0.0
Tuvalu	Jan./Dec.	1.1	0.0	1.1	1.1	0.0	0.0	0.0
Vanuatu	Jan./Dec.	11.0	0.0	11.0	12.0	0.0	0.0	0.0
EUROPE		1 457.6	26.5	1 484.1	1 165.0	310.2	3.7	306.5
Albania	July/June	387.6	26.5	414.1	380.0	130.0	3.7	126.3
Belarus	July/June	610.0	0.0	610.0	455.0	180.2	0.0	180.2
Bosnia-Herzegovina	July/June	460.0	0.0	460.0	330.0	0.0	0.0	0.0
TOTAL		73 290.0	5 931.4	79 221.4	87 302.7	33 246.6	3 045.7	30 200.9

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. US\$1 415 in 2002), which is in accordance with the guidelines and criteria agreed to by the CFA should be given priority in the allocation of food aid.

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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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