

FOODCROPS AND SHORTAGES

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	<p>AFRICA: In eastern Africa, serious food difficulties have emerged in Eritrea and Ethiopia due to poor harvests. Elsewhere in the sub-region, notwithstanding improved overall food supply, localized food production shortfalls have increased the number of people requiring food assistance. In southern Africa, the food supply situation is very serious, particularly in rural and urban areas of Zimbabwe. There is need to expedite both commercial and food aid imports to prevent a full-scale famine. In west Africa, the food situation is extremely serious in Mauritania, following three consecutive poor harvests, while emergency food assistance is needed in Côte d'Ivoire, following a resurgence of civil strife.</p>
	<p>ASIA: Donor pledges are urgently needed to meet emergency food requirements for DPR Korea in the months immediately ahead, while relief also continues to be required in a number of countries for vulnerable people affected by floods, storms and drought, notably in Bangladesh, Mongolia, Nepal, Pakistan and Sri Lanka. Cereal harvests this year in the CIS countries of Asia have significantly recovered. However, food supply in Tajikistan and Georgia remains rather tight.</p>
	<p>LATIN AMERICA AND THE CARIBBEAN: Food assistance is being provided in El Salvador, Guatemala, Honduras and Nicaragua to rural families affected by the severe crisis which has hit the coffee sector. The western parts of Cuba and most of Jamaica have been affected by hurricanes "Isidore" and "Lili". Damage to important cash crops is reported. Food assistance is also being provided in Haiti to farmers in the southern departments affected by adverse weather. In Paraguay, emergency relief, including food aid, is being delivered to rural families in the western parts affected by drought.</p>
	<p>EUROPE: Weather conditions this autumn have been generally satisfactory in the EU for the winter grain planting. Throughout most of eastern Europe, widespread autumn rains have improved soil moisture conditions for the germinating winter grains and the early prospects for crops are generally more favourable than last year at the same time. Cereal output in the European CIS countries this year is estimated to match the bumper harvest of the preceding year.</p>
	<p>NORTH AMERICA: Winter wheat planting is virtually complete in the United States and the condition of emerging crops is on the whole better than at the same time last year. In Canada, output of cereals in 2002 has fallen sharply following severe drought in parts. Output of wheat is officially estimated at 15.5 million tonnes, about 25 percent down from last year while that of coarse grains is put at 19.8 million tonnes, 13 percent down from 2001.</p>
	<p>OCEANIA: The 2002 wheat crop in Australia is forecast at just 10.1 million tonnes, 58 percent below the previous year's near record crop after severe drought during the growing season. The winter barley crop is likewise expected to fall sharply. Papua New Guinea is experiencing a severe drought which has caused water shortages especially in urban areas.</p>



AFFECTED COUNTRIES^{1/}

COUNTRIES FACING FOOD EMERGENCIES (Total: 39 countries)

<u>Region/Country</u>	<u>Reason for Emergency</u>	<u>Region/Country</u>	<u>Reason for Emergency</u>
<u>AFRICA (25 countries)</u>		<u>ASIA (6 countries)</u>	
Angola*	Internally displaced persons (IDPs)	Afghanistan*	Effects of earlier drought and war
Burundi*	Civil strife, IDPs	Georgia	Drought and input shortages
Cape Verde	Drought	Iraq*	Shortage of inputs, effects of earlier drought
Central Afr. Rep.	Civil strife	Korea, DPR*	Adverse weather, economic constraints
Congo, Dem.Rep.*	Civil strife, IDPs and refugees	Mongolia*	Harsh winters, drought
Congo Rep. of*	Civil strife, IDPs	Tajikistan	Input and irrigation water shortages
Côte d'Ivoire	Civil strife, IDPs		
Eritrea*	Drought, IDPs, returnees	<u>LATIN AMERICA (6 countries)</u>	
Ethiopia*	Drought, IDPs	El Salvador	Drought, earthquakes, international coffee crisis
Guinea	IDPs and refugees	Guatemala	International coffee crisis
Kenya*	Drought in parts	Haiti	Drought, flooding
Lesotho	Adverse weather	Honduras	International coffee crisis
Liberia*	Civil strife, IDPs	Nicaragua	International coffee crisis
Madagascar	Drought in parts, economic problems	Paraguay	Drought
Malawi	Adverse weather		
Mauritania	Drought, irrigation water shortages	<u>EUROPE (2 countries)</u>	
Mozambique	Drought in parts	Russian Federation	
Sierra Leone*	Civil strife, IDPs	(Chechyna)	Civil strife
Somalia*	Civil strife, drought in parts	Fed. Rep. Yugoslavia	
Sudan*	Civil strife in the south and east, drought in parts	(Serbia & Montenegro)	Refugees
Swaziland	Drought in parts		
Tanzania	Drought in parts, refugees		
Uganda	Civil strife, IDPs, drought in parts		
Zambia	Drought in parts		
Zimbabwe*	Drought, economic problems		

COUNTRIES WITH UNFAVOURABLE PROSPECTS FOR CURRENT CROPS

<u>Country</u>	<u>Main contributory factors</u>
Argentina	Economic constraints
Burundi*	Dry weather
Cape Verde	Dry weather
Central Afr. Rep.	Dry weather, civil strife
Côte d'Ivoire	Dry weather, civil strife
Eritrea*	Drought
Ethiopia*	Drought
Kenya*	Adverse weather
Liberia*	Civil strife
Papua New Guinea	Drought
Paraguay	Drought
Rwanda	Dry weather
Sudan*	Drought, displacement
Uganda	Drought, displacement

^{1/} Both here and in the text, countries with unfavourable prospects for current crop and/or uncovered shortfalls are marked in **bold** and those affected or threatened by successive poor crops or food shortages are marked with an asterisk (*). Definitions can be found on the Contents page.

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

CROP AND FOOD SUPPLY SITUATION

OVERVIEW

As of November 2002, the number of countries facing serious food difficulties throughout the world stands at 39, with 25 in Africa, 6 in Asia, 6 in Latin America and 2 in Europe.

In **southern Africa**, the difficult food supply situation, as a result of two poor harvests in a row, continues to tighten with dwindling food stocks and slow imports. The food situation is particularly critical in Zimbabwe where serious food shortages are affecting half of the population. Food assistance to the neediest is inadequate and slow in coming, while commercial imports are hampered by the worsening economic crisis. Out of the 14.4 million people severely at risk and in need of food assistance in southern Africa, WFP has requested 993 000 tonnes of food aid to assist 10.3 million of the worst-affected people until March 2003. Against this requirement, pledges by early November amounted to some 637 000 tonnes. While food aid distributions in the sub-region speeded up in October, they remained well below target in Zimbabwe due to insufficient contributions, and in Zambia where the Government's refusal of GM grain has resulted in delays in distributions. There is urgent need for additional food aid pledges and for expediting delivery of contracted commercial imports to avoid a rapid deterioration of the food situation. Planting of the 2003 cereal crops has started, and prospects are favourable so far, reflecting generally abundant precipitation since the second dekad of October. However, unseasonably dry weather prevails in Malawi and northern parts of Zambia.

In the **Great Lakes region**, prospects for the 2003 first season crops are poor in Burundi and Rwanda reflecting below-average precipitation in September and October. Production is anticipated to be reduced in many areas. In Burundi, the impact of dry weather is being compounded by a deterioration in the security situation, resulting in increased numbers of people in need of emergency food assistance. In the Democratic Republic of Congo the food and nutritional condition has further worsened as a result of renewed fighting and massive population displacement.

In **eastern Africa**, serious food shortages have emerged in several parts mainly due to drought conditions, with increasing numbers in need of food assistance.

In Eritrea, the food situation is serious due to the failure of the short "azmera" rains and inadequate long "kiremti" rains. The Government of Eritrea has appealed for emergency food assistance for about 1.4 million people. In Ethiopia, poor secondary season "belg" rains and a late start and early cessation of the current main "meher" season rains have created an alarming food situation. Large numbers of livestock have died and unusual migrations in search of water and pasture are reported in several parts of the country. In response, the Government has recently appealed to the international community for food assistance for about 6 million people. In Kenya, the current maize harvest in major producing provinces has improved the overall food supply situation. However, despite recent beneficial rains the food supply situation is of concern in the districts of Mandera, Turkana, Samburu, Marsabit, West Pokot and Baringo. In Sudan, crop prospects are unfavourable due to delayed onset of rains and population displacement in the south following recent escalation of the long-running conflict. In Somalia, despite the current good secondary "deyr" season rains and the favourable outturn of the main season "gu" crops, harvested last August, continuing insecurity and escalation of conflict in parts with attendant population displacement are cause for serious concern. In Uganda, despite an overall stable food supply situation, erratic rains in parts and recent population displacements in the north pose serious food problems in the affected areas. In Tanzania, the recent good harvests from the main season crops have improved overall food availability.

In **central Africa**, in the Central African Republic, harvest prospects are uncertain following erratic and below average rains affecting crop development in some regions. A resurgence of fighting in the capital city, Bangui, has displaced a large number of its residents.

In **northern Africa**, planting of the winter wheat and coarse grains has started for the spring 2003 harvest. Aggregate cereal output in 2002 was 28 million tonnes, slightly below the output in 2001 but above the past 5-year average of about 26.7 million tonnes. Significant increases have been registered in Egypt and Morocco. In Algeria and Tunisia, by contrast, production of wheat and coarse grains declined considerably from 2001 levels, mainly as a result of dry weather at planting and during the development period.

In **west Africa**, the performance of the 2002 cereal harvest in the Sahel is mixed. Following the first rains in June, a long dry spell from early July through August severely affected crops in Cape Verde, The Gambia, Guinea Bissau, Mauritania and Senegal. Production of rainfed crops fell sharply, although rainfall in August reduced losses somewhat. In the eastern and central parts of the Sahel (the main producing countries) by contrast, growing conditions were more favourable, despite an erratic start of the rainy season which necessitated replantings. A series of joint FAO/CILSS Crop Assessment Missions in the 9 CILSS member countries of the Sahel in October

estimated aggregate 2002 cereal production at 11.3 million tonnes, 3 percent lower than 2001 but 11 percent above average. Below-average harvests are anticipated in Cape Verde, Guinea Bissau and Mauritania; while near average production is expected in Chad, the Gambia, Mali and Senegal. Above-average outputs are foreseen in Burkina Faso and Niger. In the coastal countries along the Gulf of Guinea, harvest prospects are generally favourable in Benin, Nigeria and Togo but less favourable in Ghana, following below normal rains in September and October. In Liberia, agricultural activities have been disrupted by renewed civil strife, pointing to reduced rice production this year. In Côte-d'Ivoire, a reduction in rice and other cereal production is forecast as a result of unfavourable weather and conflicts that forced many farmers to leave their land.

In **Asia**, the early outlook is generally favourable for the largely irrigated cereal crops being planted now for harvest in 2003. By contrast, the outcome of the main season harvest, which has been completed in most countries, was affected by an erratic 2002 monsoon and other irregular weather developments. In a number of countries, this resulted in below average cereal outputs and consequent food shortages, while in other countries bumper crops were reaped. Thus, in DPR Korea, an FAO/WFP Crop and Food Supply Assessment Mission in October concluded that despite an improvement in cereal production, domestic food supplies continue to fall short of demand and have to be supplemented by cereal imports. Taking into account commercial imports, the food aid requirement for 2002/03 is estimated at 0.98 million tonnes of cereals. Donor pledges are urgently needed to cover the WFP emergency operation for the remainder of 2002 and the first quarter of 2003. In Mongolia, less than 50 percent of normal precipitation and scorching temperatures in the summer of 2002 seriously affected both cereal and livestock production aggravating the food situation of the already disaster-hit agricultural population. Food relief will be necessary to meet the shortfall in supplies.

In the **Near East**, favourable weather conditions in most countries have boosted domestic food production. In Afghanistan agricultural production has recovered strongly, reducing cereal import requirements by more than a third compared to the previous two years. Funding shortfalls in the face of massive return of refugees give cause for serious concern. Investment in the agricultural sector, particularly in the rehabilitation, upgrading and maintenance of the irrigation infrastructure will be essential for speedy recovery of the Afghan economy. In the Islamic Republic of Iran, torrential rains in August triggered flash floods and landslides in north-eastern provinces, affecting 100 000 people and causing 37 deaths. The food situation in the West Bank and Gaza Strip is grave due to the continuing confinement of families in homes by curfews and military operations.

In the **Asian CIS**, cereal harvests this year have sharply recovered owing mainly to improved precipitation and relatively better growing conditions. Cereal harvests in the Kyrgyz Republic, Uzbekistan, Turkmenistan, Azerbaijan and Armenia have significantly improved. However, food supply in Tajikistan and Georgia remains rather tight.

In **Central America**, the outlook is favourable for the 2002/03 second season cereal and bean crops. Harvesting is underway and average maize outputs are expected in El Salvador, Guatemala and Honduras, while in Nicaragua an above-average output is expected. The food supply situation continues to be tight, however, in certain localized communities of the sub-region, particularly those affected by the crisis in the coffee sector. Plantations in many areas have been forced to close and thousands of workers were left unemployed. Food assistance from the international community is being distributed to the most affected families. In the **Caribbean**, the passage of hurricanes "Isidore" and "Lili" in Cuba and Jamaica, at the end of September and first days of October, inflicted considerable damage to important cash crops, such as citrus, tobacco and sugar, as well as to rural housing and infrastructure. In Haiti, seasonal rains are benefiting planting of the second season coarse grain and bean crops. The crops had been adversely affected by dry weather, particularly in the north-west, earlier in the year. In the southern departments of the country, food assistance is being provided to farmers affected by adverse weather at planting and during the growing season.

In **South America**, harvesting of the 2002 wheat crop and planting of the 2002/03 first season coarse grain crops is underway in the southern areas of the sub-region. Growing conditions are generally favourable. In Paraguay, by contrast, a prolonged drought is affecting the western departments, and a state of emergency has been declared by the government which has appealed for emergency assistance, including food aid. In the Andean countries, in Peru, production of wheat and maize outputs in 2002 is provisionally estimated at well above-average levels. A bumper paddy crop has also been harvested. In Ecuador, a series of volcano eruptions in October and early November affected crops and pastures. However, maize output has been above average.

In **Europe**, aggregate 2002 cereal production in the EU is estimated to rise to about 212 million tonnes, 5 percent up from last year, after sharply increased wheat crops several major producing countries. The estimate of aggregate coarse grain production remains at about 105 million tonnes, about 2 percent down from last year. Winter grain planting is underway in northern parts of the EU under generally satisfactory weather conditions. In eastern Europe, wheat production has dropped sharply in Hungary and Romania but elsewhere outputs are similar

to last year's levels. Widespread autumn rains have improved soil moisture conditions throughout the region for the germinating winter grains.

In the European **CIS**, cereal harvest in 2002/03 marketing year is expected to nearly match the bumper harvest of the preceding year. In Russia cereal harvest this year includes 47.5 million tonnes of wheat and 35.3 million tonnes of coarse grains, which respectively compare with 46.9 million tonnes and 35.9 million tonnes in 2001/02 marketing year. Cereal harvest in Ukraine includes some 21 million tonnes of wheat and 15.9 million tonnes of coarse grains, which compares with 21.3 million tonnes of wheat and some 15.9 million tonnes of coarse grains in the 2001/02 marketing year.

In the **Balkans**, cereal harvest is estimated to nearly match the sharply recovered harvest of the preceding year. Torrential floods and hail, which normally damage spring crops, did not have any significant impact on crops this year.

In **North America**, the latest official estimates put the 2002 wheat output in the United States at about 44 million tonnes, 17 percent down from the already reduced crop in 2001. With the bulk of the coarse grain crop harvested by the end of October, the latest forecast of aggregate coarse grain output in the United States stands at about 246 million tonnes, 6.5 percent down from last year. The bulk of the winter wheat crop for harvest in 2003 was planted by the end of October, the overall rate of planting and emergence being slightly ahead of the normal for that time of year. The condition of emerging crops is reported to be on the whole better than at the same time last year. In Canada, output of cereals in 2002 has fallen sharply following severe drought in parts of the country. Output of wheat is officially estimated at 15.5 million tonnes, about 25 percent down from last year while that of coarse grains is put at 19.8 million tonnes, 13 percent down from 2001.

In **Oceania**, the winter grain harvest is getting underway in Australia, where this year's crops have been severely affected by drought. Wheat output is forecast at about 10.1 million tonnes, 58 percent below the previous year's near record crop. The winter barley crop is likewise expected to fall sharply. Good rainfall is needed in the coming weeks for planting in the main summer crop areas. In Papua New Guinea, a severe drought activity in West New Britain province has forced people out of their villages.

COUNTRY REPORTS ^{1/}

AFRICA

NORTHERN AFRICA

ALGERIA (5 November)

Planting of the winter cereals for harvesting from June 2003 has only started under normal weather conditions. The 2002 aggregate cereal output is estimated at 1.5 million tonnes which compares to the bumper crop of 2.6 million tonnes in 2001 and the past five-year average of 1.9 million tonnes. The decline is mainly the result of a smaller area planted, caused by the late arrival of the rains at planting, coupled with considerably lower than normal yields due to an above-average moisture deficit in most of the country which prevailed during the development period. Wheat output was 45 per cent lower than the previous year and coarse grains, principally barley, was almost 37 per cent less.

Cereal imports in marketing year 2002/03 (July/June) are forecast to increase from 7.2 million tonnes in the previous year to about 7.7 million tonnes, largely reflecting the drop in production.

EGYPT (5 November)

Harvesting of the 2002 maize and sorghum crops have been recently completed while that of the paddy crop is well advanced. The state of the crops is reported to be normal. A slightly above-average wheat crop of 6.6 million tonnes was harvested in 2002. Production of maize, the main coarse grain, is provisionally estimated at 6.6 million tonnes, some 4 per cent smaller than the output collected in 2001 but still average. A well above-average paddy crop of 6.0 million tonnes is also provisionally estimated, which compares to a past 5-year average of 5.4 million tonnes. Planting of the irrigated wheat crop for harvesting from April 2003 has only started.

Wheat imports in 2002/03 (July/June) should be about 6.3 million tonnes, some 7 per cent below the volume imported in 2001/02. Maize imports are forecast to decrease slightly from the previous year's level.

MOROCCO (5 November)

Planting of the winter cereal crops has started under normal weather conditions. In order to assure a successful agricultural campaign in 2003, some incentive measures, particularly credit concessions to farmers, have been adopted by the government. Other measures such as the availability of seeds of drought resistant varieties and fertilizers to farmers are also currently being adopted. Aggregate cereal production in 2002 was a bumper 5.3 million tonnes, 11 per cent over the above-average output collected in 2001. The increase was particularly significant in the production of barley, which went up from about 1.1 million tonnes in 2001 to about 1.7 million tonnes this year. Above-normal and well-distributed rains since April benefited the crops.

Imports of wheat in 2002/03 (July/June) are forecast to decline from 3.0 million tonnes in marketing year 2001/02 (July/June) to 2.95 million tonnes while maize imports are expected to increase from 800 000 tonnes to some 900 000 tonnes. Imports of barley should decline from 700 000 tonnes to 500 000 tonnes.

^{1/} Bold print is used for countries with unfavourable crop prospects for current crops and/or uncovered shortfalls in food supplies in the current marketing year requiring exceptional and/or emergency assistance. Countries affected or threatened by successive bad crops and/or food shortages are marked with an asterisk (*).

TUNISIA (5 November)

Planting of the winter cereal crops, mainly wheat and barley, has started for harvest in the spring 2003. Aggregate cereal production in 2002 has been a low 515 000 tonnes, which compares to last year's average production of 1.4 million tonnes. Wheat output decreased from 1.1 million tonnes in 2001 to 423 000 tonnes, while barley production dropped from 233 000 tonnes to 90 000 tonnes. The decline was principally due to the prolonged dry weather and late arrival of the rains.

Wheat imports are expected to increase from 1.2 million tonnes in marketing year 2001/02 (July/June) to some 1.8 million tonnes in 2002/03. Imports of barley are also expected to increase, while maize should remain close to the same volume imported in the previous year.

WESTERN AFRICA

BENIN (9 November)

The prospects for the 2002 cereal crop are favourable reflecting overall good weather during the growing season. In the south the first maize crop has been harvested while the second maize crop, is flowering/cobbing. In the North, harvesting of millet and sorghum is underway, while rice harvesting is due to start soon.

Following last year's good cereal output and the arrival of the first season crops on the markets, the food supply situation remains satisfactory. The cereal import requirement for 2002 (including re-exports of 30 000 tonnes of rice and wheat) is estimated at 144 000 tonnes, including 14 000 tonnes of food aid.

BURKINA FASO (9 November)

The prospects for the 2002 cereal harvest are favourable despite the erratic starts of the growing season in most regions that delayed plantings. Regular and widespread rains from August through October improved crop conditions countrywide with the exception of the northern regions and Sahel. Pastures are adequate in southern and western areas but insufficient in the north and Sahel. The locust situation remained mostly calm despite some attacks of cantharid and other insects which were adequately controlled.

A joint FAO/CILSS Crop Assessment Mission that visited the country recently, estimated 2002 aggregate cereal production at 3.28 million tonnes (rice in paddy equivalent). This is five percent above last year's level and markedly higher than the average for the last five years. Compared to 2001, maize production increased by 14 percent, rice by 5 percent and sorghum and millet by 4 percent and 3 percent, respectively.

The overall food supply situation remained satisfactory during the lean season July-September. Reflecting this year's good harvest, the food supply position will improve also in those areas where it had tightened before the harvest as a result of low production, depleted stocks and sharp increase in cereal market prices which limited access to food.

CAPE VERDE (9 November)

Due to a late start of the rainy season which delayed plantings, and subsequent erratic precipitation, the conditions of the maize crop, the only cereal grown, have been poor in most islands.

A joint FAO/CILSS/WFP Crop and Food Supply Assessment Mission recently estimated the output from the maize crop, to be harvested until December, at some 5 000 tonnes mostly produced in Santiago Island (54 percent) and Fogo island (35 percent). This level of

production is only one fourth of last year's output and similar to the poor crops harvested in 1997 and 1998. Production of beans and potatoes will also be below normal.

The Mission estimated cereal import requirements for the marketing year 2002/03 at 108 518 tonnes. Taking into account an anticipated commercial cereal import of 33 250 tonnes and 37 300 tonnes of food aid pledges, the total uncovered deficit for the year is about 37 900 tonnes. Although the country imports the bulk of its consumption requirement also in a year of normal production, the rural population, particularly in the semi-arid zones, could be severely affected.

CHAD (9 November)

After erratic and below-normal rains at the beginning of the season, that delayed sowings of cereals by 2 – 6 weeks, better precipitation occurred from July onwards, notably in the Sudanian zone. Pasture is adequate in both the Sudanian and Sahelian zones. However, in July, shortage of pasture in the departments of Dadaba, Baguirmi and Hadjer Lamis, resulted in some losses of livestock. Grasshopper attacks and army worm infestations were reported in several regions early in the season. In September, grasshoppers caused damage to crops in several areas of the Sahelian zone.

A joint FAO/CILSS Crop Assessment Mission which visited the country in mid-October provisionally estimated the aggregate output of cereals at 1.12 million tonnes, 15 percent below last year's above average level of 1.31 million tonnes and only fractionally lower than the average for the previous five years.

Despite this year's reduced crop, the overall food supply position is satisfactory. However, people in the areas previously affected by floods and those living in the structural deficit areas of Karem and Bahr El Ghazel will continue to be in need of food assistance. Prices of cereals this year remained mostly stable compared to 2001 and started to decline with the arrival of the new crop on the markets.

COTE D'IVOIRE (9 November)

The harvesting of the first maize crop and the sowing of the second crop have been completed. The harvesting of the other cereals, mostly rice, is underway and will continue until December. However, well below normal rainfall in September and October may have affected the second maize crop. A reduction in rice and other cereal production is forecast this year as a result of unfavourable weather and the conflicts that forced many farmers to leave their land and disrupted marketing activities.

Production of cereals in 2001 is estimated at 1.8 million tonnes (rice in paddy equivalent), fractionally higher than previous year's above average harvest.

On 19 September, fighting broke out in the cities of Abidjan, Bouake and Korogho between a military rebel group and government forces. In Abidjan, thousands of people living in the shanty town areas were displaced when government forces burnt houses in a search of rebels. Most of them have insufficient access to basic needs including food. In Bouake, worsening conditions including lack of food supplies have prompted many residents to flee. According to the Red Cross between 150 000 and 200 000 residents have fled the town, whose population used to be about 600 000.

A serious food supply situation is reported for the vulnerable people in the areas controlled by the rebels and for the displaced persons in transit centres. WFP has launched a three-month Regional Emergency Operation to assist 94 000 people affected by the conflict, with 4 145 tonnes of food. The bulk of this operation will take place in Côte d'Ivoire but will also cover neighbouring countries of Burkina Faso, Mali and Ghana.

THE GAMBIA (9 November)

A joint FAO/CILSS/WFP Crop and Food Supply Assessment Mission which visited the country recently from 20 to 26 October, estimated 2002 aggregate cereal production at some 150 000 tonnes, about one quarter less than last year's above average harvest and slightly below the average for the previous five years. The important early millet crop decreased by 10 percent to some 89 000 tonnes while the paddy crop, estimated at about 20 000 tonnes, was lower than both last year and the average by 45 percent and 35 percent, respectively. Production of groundnut, the main cash crop, was down by more than half to 73 500 tonnes mostly reflecting a reduction in the area planted. This decline is due to a dry spell which lasted for three to five weeks from late June to early August.

Millet prices have increased steeply over the last six months, rising by 245% from May to October 2002 and passing beyond rice prices for the first time in the last five years. Although the cereal production shortfall is anticipated to be covered by commercial rice and wheat imports, millet prices are likely to stay high, given the poor harvest forecast for 2002/03 in the Gambia as well as in the whole western Sahel region. The impact on vulnerable households food security should be monitored closely.

GHANA (9 November)

In the south, rains were generally below average in September and October, which may have affected development of the second maize crop. Harvest prospects are therefore mixed.

In early February, a joint FAO/WFP Crop and Food Supply Assessment Mission visited northern Ghana where unusually dry weather conditions had affected crop production. The mission estimated the 2001 cereal production at 1.525 million tonnes, (milled equivalent) which was below average. However the overall food supply situation is close to normal as reduced cereal production in northern regions will be covered by adequate availability of other foodcrops, anticipated commercial imports and food aid already pledged.

The mission estimated total cereal import requirements in 2002 (January/December) at 461 200 tonnes including 89 000 tonnes of food aid. Worst affected areas and vulnerable groups will require food assistance estimated at about 5 000 tonnes to compensate for their reduced harvests.

GUINEA (10 November)

Following generally below-average rainfall until late October, harvest prospects are uncertain. However, the overall food supply situation is satisfactory reflecting satisfactory harvests in 2000 and 2001. Markets are well supplied.

The presence of a large refugee population and the persistent instability in the sub-region have exacted a heavy toll on the country. According to WFP, some 30 000 new Liberian refugees entered the country since the beginning of the year, of whom 80 percent were women and children. Following armed clashes in and around the country over the period September 2000 – March 2001, there are still some 82 000 IDPs, mainly concentrated in Kissigougou, Macenta and Gueckedou Prefectures. Approximately 45 000 Liberian refugees in camps are currently receiving WFP assistance. Some 5 000 Liberians are also being assisted by WFP outside the camps in areas close to the Guinean-Liberian border waiting for transfer to the camps by UNHCR. New refugees have entered Guinea from Côte d'Ivoire into the Kankan and N'Zérékoré regions.

Cereal import requirement for the 2002 marketing year is estimated at 331 000 tonnes.

GUINEA-BISSAU (10 November)

After substantial rains in mid-June, precipitation decreased in July, delaying transplanting of rice from seedbeds to swamp areas. Precipitation resumed in early August and remained abundant until October, allowing transplanting of rice to continue.

A joint FAO/CILSS Crop Assessment Mission which visited the country from 21 to 26 October estimated 2002 aggregate cereal production at some 147 000 tonnes (rice in paddy equivalent), which is 11 percent below last year's output and 5 percent below the average for the previous five years.

Following the arrival of the first season crops on the markets, the overall food supply situation remains satisfactory. However, the food situation of people living in the structural deficit areas along the northern border with Senegal should be closely monitored.

LIBERIA* (9 November)

Following generally below-average rainfall through late October, harvest prospects are uncertain.

As a result of the persistent armed clashes, some 184 000 internally displaced persons from the north, northwest, and central regions are currently living in camps in other parts of the country. WFP, which has expressed concern about the continuing increase in the number of IDPs, continues to provide food assistance to them, in addition to more than 22 000 Sierra Leonean refugees still in the country. While access has improved for those living in areas under Government control, the situation remains uncertain for those in contested areas where insecurity and violence continue to prevent provision of humanitarian assistance.

Recent reports indicate that 40 000 Liberians have fled to Sierra Leone, 117 000 to Guinea and some 75 000 to Côte d'Ivoire.

MALI (9 November)

Following irregular and below-average rains in May and June, precipitation improved in early July and remained widespread and regular until early September. However, it decreased significantly during the last dekad of September.

A joint FAO/CILSS Crop Assessment Mission which visited the country from 7 to 11 October estimated 2002 aggregate cereal production at some 2 500 000 tonnes (rice in paddy equivalent), which is similar to both last year's good harvest and the average of the last five years. Compared to last year, rice production is forecast to decrease by 13 percent to some 816 000 tonnes, while coarse grains production, estimated at about 1 700 000, increased by 4 percent.

The overall food situation is satisfactory. Overall cereal prices started to decrease. The reconstitution of the National Security Stock to its optimum level of 35 000 tonnes will require the purchase of 15 000 tonnes in 2002/03.

MAURITANIA (10 November)

Dry spells and the poor distribution of rainfall in 2001 growing season resulted in a serious decline in the cereal production. Final production estimates by national statistical services is estimated at some 122 177 tonnes, 32 percent lower than the previous year and 27 percent lower than the average of the last five years. In addition, freak rain storms from 9-11 January caused the death of 120 000 cattle, sheep and goats; destruction of 25 percent of already harvested crops; and loss of lives and property. Prices of cereals have risen considerably on most markets while animal prices decreased steeply. The food crisis has been amplified by

poor rainfall during the 2002 growing season, which led to the failure of most 'dieri' (rainfed) crop, creating the risk of a severe food crisis. On 1 September the Government declared a national disaster and appealed for emergency food aid.

A joint FAO/CILSS/WFP Crop and Food Supply Assessment Mission which visited the country from 20 to 26 October, estimated 2002 aggregate cereal production at some 100 000 tonnes, about 40 percent less than the average for the previous five years and 18 percent below last year's poor harvest. The 'dieri' crop, which represents more than 80 percent of planted areas or about 60 percent of total cereal production in a normal year, decreased by 80 percent to some 8 000 tonnes.

The mission estimated cereal import requirements for the marketing year 2002/03 (November/October) at 322 534 tonnes, of which wheat accounts for almost 200 000 tonnes. Taking into account an anticipated commercial cereal import of 228 000 tonnes and 11 000 tonnes of food aid pledges, the total uncovered cereal deficit for the year is about 95 000 tonnes. Approximately 400 000 people throughout Mauritania will require food assistance. Emergency provision of agricultural inputs such as seeds is recommended to enable disaster-affected farming families to restart agricultural production during the next main planting season starting in June 2003.

Evidence of malnutrition abounds in the form of exhaustion and loss of weight, night blindness, scurvy, dehydration and diarrhoea and hunger-related deaths.

In March 2002, WFP launched an Emergency Operation valued at US\$ 7.5 million (16 230 tonnes of food) to assist 250 000 people most threatened by serious food shortages. By end September, due to a limited donor response, only 46 percent of WFP's emergency food requirements have been covered. However, new pledges have been received in October. Other than WFP's emergency assistance, bilateral contributions were received from France (600 tonnes of wheat through the French Red Cross), and Italy (approximately 920 tonnes rice). An EU-financed food security stock consisting of 6 000 tonnes of wheat is scheduled to arrive in October. In addition, the Government of Mauritania distributed 10 000 tonnes of wheat from its own resources.

NIGER (10 November)

Good rains from late July through August remained widespread over the main producing areas in September. A joint FAO/CILSS Crop Assessment Mission in early October gave a provisional estimate of the aggregate output of cereals at around 3 million tonnes. This is similar to the previous year level and above average.

Harvesting has started in most regions, improving cereal supply and reducing prices on markets. Farmers should be able to reconstitute their stocks as well as the government the national security stock at its optimum level of 35 000 tonnes.

NIGERIA (10 November)

Following widespread and regular rains since July, precipitation decreased in the north in September and ceased in mid-October. Strong rains were registered in the south in October benefiting the second maize crop. Coarse grains are being harvested in the north. Reflecting generally favourable growing conditions during the rainy season, an average to above-average harvest is anticipated. The overall food supply situation is satisfactory. Some population groups, however, remain vulnerable following communal conflicts notably in the states of Benue, Nasarawa and Taraba. From April to June, more than 85 000 IDPs have been resettled in their home villages in central region.

SENEGAL (10 November)

Following the dry spell of July which severely stressed crops and caused crop failure in many areas, precipitation resumed in early August and remained widespread and well distributed until mid-September. Some of the crops that suffered temporary wilting recovered. However, rainfall decreased significantly during the last dekad of September before resuming in October.

A joint FAO/CILSS/WFP Crop and Food Supply Assessment Mission which visited the country from 14 to 20 October estimated 2002 aggregate cereal production at some 900 000 tonnes, 7 percent less than last year's average harvest and about 2 percent below the average for the previous five years. The important millet crop is expected to decrease (for the second consecutive year) by 10 percent to some 425 000 tonnes while the paddy crop is estimated at about 219 000 tonnes, similar to the average of the past five years but 10 percent lower than last year. Production of groundnut, the main cash crop, will be down by more than 35 percent to some 533 000 tonnes.

Millet prices have increased steeply over last marketing year, rising by 70 percent from October 2001 to September 2002. Although the total cereal import requirement, estimated at 1 056 440 tonnes, is anticipated to be covered by commercial rice and wheat imports, millet prices are likely to stay high, given that its production has decreased for the second consecutive year and that its supply will be limited in the whole western Sahel region during marketing year 2002/03. The impact on rural vulnerable households' food security should be monitored closely.

SIERRA LEONE* (10 November)

Rainfall was generally below average this season. However, harvest prospects are generally favourable reflecting an improved security situation, increased plantings by returning refugees and farmers previously displaced, as well as comparatively improved conditions for the distribution of agricultural inputs. Cereal production in 2001 is estimated at 348 000 tonnes.

In an effort to continue helping the country, a UN Consolidated Inter-Agency Appeal was launched on 26 November 2001, including an agricultural component with five projects proposed by FAO to facilitate recovery of food production and reduce dependence on food aid.

The renewed conflict in Liberia has caused at least 40 000 Liberians to cross into the country since the beginning of the year, while some 39 000 Sierra Leoneans who had been living in camps in Liberia and 15 000 who had lived outside camps returned home as fighting intensified.

Sierra Leone's cereal import requirement for 2002 is estimated at 225 000 tonnes including 40 000 tonnes of food aid.

TOGO (10 November)

Following generally widespread precipitation during the rainy season, rains ceased in late October over the northern half of the country. In the south, the second maize crop is developing satisfactorily. In the north, coarse grains are being harvested.

Following an average cereal harvest in 2001, estimated at about 0.7 million tonnes, the overall food situation is satisfactory.

CENTRAL AFRICA

CAMEROON (10 November)

Following generally abundant and widespread rains, precipitation ceased in the north from late October but remained by contrast well abundant in the south. Coarse grains have been harvested in the north. The maize crop is developing satisfactorily in the south.

The overall food supply situation is satisfactory. Cereal imports (including re-exports) in the 2002 marketing year are estimated at 310 000 tonnes.

CENTRAL AFRICAN REPUBLIC (10 November)

Following erratic and below-average rains that affected crops development in some regions, harvest prospects are mixed. However, due to an above-average harvest in 2001, the overall food supply situation remains satisfactory.

In late October, a resurgence of fighting in Bangui between government and rebel troops led to new population displacements. WFP has distributed 45 tonnes of food to 10 000 most affected people in northern parts of Bangui.

CONGO, DEMOCRATIC REPUBLIC OF* (6 November)

The food situation remains critical as a result of the persistent civil war. An escalation of military activities in the eastern Kivu region in October, particularly around the town of Uvira, has resulted in renewed displacements of the population fleeing from the fighting, at the same time further hampering access by humanitarian agencies to the affected population. The food situation of the internally displaced population is extremely serious. Recent assessments indicate that between 10 to 30 percent of the population in eastern areas of the country are suffering from acute malnutrition. The food and nutritional situation is also severe in urban areas, particularly in the capital Kinshasa and surrounding areas, where high poverty levels prevail, and in the Katanga Province where this year cereal and bean harvest was sharply reduced by the drought that affected the Southern Africa region. Prices of basic food have increased significantly since July in this province, constraining access to food for large sections of the population.

CONGO, REP OF* (10 November)

A resurgence of fighting in the Pool region (surrounding the capital Brazzaville) at the end of March led to new population displacements. About 50 000 IDPs have been reported in the region. Some areas have been cut off from humanitarian aid since late March. The displacement of people and disruption of marketing activities have seriously affected the food supply situation. In late May WFP started assisting 20 000 IDPs, amidst growing concern about tens of thousands more people trapped in the conflict areas inaccessible to aid agencies. The Emergency Operation for the assistance of the Democratic Republic of Congo's refugees in the north of Congo Brazzaville that was due to end on 31 May 2002 has been extended until December.

Cereal imports for the 2002 marketing year are estimated at 125 000 tonnes, mostly wheat and rice.

EQUATORIAL GUINEA (10 November)

Following mostly seasonably dry weather in July and August, rains resumed in early September and became abundant and widespread in October. The staple crops are sweet potatoes, cassava and plantains. Cereal import requirement for 2002 is estimated at 15 000 tonnes (10 000 tonnes of wheat and 5 000 tonnes of rice).

GABON (10 November)

Following mostly seasonably dry weather in July and August, rains resumed in early September and became abundant and widespread in October. The main foodcrops are cassava and plantains but some maize is also produced (around 31 000 tonnes). The country imports commercially the bulk of its cereal requirement, estimated at around 88 000 tonnes for 2002

SAO TOME AND PRINCIPE (10 November)

The staple foodcrops are roots, plantains and tubers. The cereal import requirement in 2002 is estimated at 12 000 tonnes.

EASTERN AFRICA

BURUNDI* (6 November)

Prospects for the 2003 first season crops, to be harvested from late December, are poor. Following good rains at the beginning of September, below-average precipitation was experienced in most areas until mid-October affecting planting operations, normally undertaken from mid-September. The dry weather has resulted in reductions in the area planted to beans and maize and negatively affected yields of early planted crops, as well as the sweet potato crops planted in April. Most affected areas are the northern provinces of Ngozi and Kayanza. Even if more rains are received in the coming months, the harvest is already anticipated to be reduced in Ngozi, Kayanza, Gitega, Ruyigi and Bujumbura Rural provinces. At the overall level, production will decline from the good level of 2002 first season.

Prices of beans have increased by 25-50 percent according to locations over the past two months, reflecting a reduced 2002 second season output. However, prices of other basic food, sweet potato, cassava and banana remain stable, or have decreased, as a result of good production. Overall, the depreciation of the national currency by 20 percent at the end of August has lowered purchasing power in urban areas.

The deterioration of the security situation in the past months has resulted in new displacements of population escaping from violence, particularly in central and eastern provinces. The food and nutrition situation of the displaced population gives cause for serious concern. Additional emergency food aid is required.

ERITREA* (6 November)

An FAO/WFP Crop and Food Supply Assessment Mission which visited the country from 19 August to 1 September has found that the secondary *azmera* season rains have totally failed and the main *kremti* season rains arrived late over most of the country. The current poor agricultural season could not have come at a worse time. The country has just started the recovery from a devastating border war with neighbouring Ethiopia. A large number of people, including farmers, are still displaced and thousands of soldiers are yet to be

demobilised. Furthermore, the resettlement of Eritrean refugees that are returning from Sudan is a further strain on the country's resources.

Against this adverse backdrop, the Mission forecast a cereal harvest of a mere 74 000 tonnes, nearly 60 percent below the average of the last 10 years. The poor rains have also had a serious impact on the country's livestock and drought-related livestock deaths were reported in several parts of the country. The cereal import requirement for the marketing year 2003 (January/December) is estimated at 413 000 tonnes. Reflecting the serious economic difficulties facing the country, only 20 percent of the requirement is anticipated to be covered commercially. With 60 000 tonnes of food aid expected by the end of 2002, the uncovered deficit, for which international assistance is required, is estimated at 273 000 tonnes. The Government of Eritrea has recently appealed for food assistance to nearly 1.4 million people.

ETHIOPIA* (6 November)

Poor secondary "belg" season rains and erratic main "meher" rainy season have severely affected agricultural production in several parts of the country. Millions of people are now estimated to be in need of urgent food assistance. In response to this alarming situation the Government recently renewed its appeal to the international community for food assistance to about 6 million people for October-December 2002, while the early forecast for 2003 needs is expected to be considerably higher. Of immediate concern are Afar and Kereyu pastoralists in the east and north-eastern parts of the country. Loss of large numbers of livestock and unusual migrations in search of water and pasture are reported. Other areas of concern include lowlands of Bale and Hararghe in Oromia Region, and Shinile, Fik, Dagahbour and Jijiga Zones in Somali Region. A much wider part of the country is expected to be affected by food shortages in 2003.

The sharp fall in grain prices following the bumper 2001 main "meher" harvest is now reversed with sharp rises reported in parts in expectation of lower production. An Emergency Operation jointly approved by FAO and WFP for food assistance to small-scale farmers and drought-affected pastoralists for a period of 12 months (1 April 2002 to 31 March 2003) is being increased in scale to cover the additional requirements. An FAO/WFP Crop and Food Supply Assessment Mission is currently in the country to assess the meher production and estimate food assistance requirements in 2003.

KENYA* (6 November)

The current maize harvest in major producing provinces has improved the overall food supply situation. The current decline in food prices in key harvesting areas and nearby markets is especially beneficial to the previously drought affected marginal agricultural households. However, early estimates of the long rains maize crop indicate an output of about 1.89 million tonnes compared to 2.32 million tonnes in 2001.

Favourable rainfall in several previously drought-affected pastoral areas improved overall food supply prospects. However, continued food security concerns are reported in the districts of Mandera, Turkana, Samburu, Marsabit, West Pokot and Baringo.

RWANDA (5 November)

Mostly dry weather from September to mid-October, particularly in areas of low and middle-altitude, has delayed plantings of beans and maize of the 2003 A season and resulted in reductions in the area planted. The dry weather has also affected development of non-seasonal crops, mainly sweet potatoes. The final outcome of the harvest, normally towards the end of the year, will depend on rains in the coming weeks, but production is likely to decline from the good level of last year due to delayed and reduced plantings.

Following a good harvest of the 2002 B season, markets are well supplied with basic staples sorghum, cassava and bananas, and prices remain stable. By contrast, prices of beans, production of which was reduced last season, have increased sharply in the past months. Despite the overall satisfactory food supply situation, a recent vulnerability assessment undertaken by WFP and other international agencies have found that 274 000 most vulnerable persons in chronically food deficit areas are in need of food assistance during the lean period from November to December.

SOMALIA* (6 November)

Good rains during the latter half of October, which were particularly abundant in major growing areas, encouraged land preparation and early sowing of the 2002/03 secondary "deyr" season crops. Flash floods were recently reported in parts but resulted in limited crop damage.

The recently harvested main "gu" season cereal crop in southern Somalia is estimated at about 209 000 tonnes (80 000 tonnes of sorghum and 129 000 tonnes of maize). Despite the good gu crop that is expected to improve overall food supply situation in parts of southern Somalia, serious food supply difficulties remain in parts due to successive years of drought and insecurity.

Elsewhere, in north-western Somalia (Somaliland) despite some recent rainfall the food situation is severe in Sool, Sanag and Nugal regions where the last poor "gu" season rains have affected crops and livestock production. The continued ban on livestock imports from eastern Africa by countries along the Arabian Peninsula has reduced foreign exchange earnings and affected the livelihoods of a large number of pastoralists. However, emerging export opportunities in chilled meat to some countries in the Middle East has helped to partly offset the negative impact on pastoralists and created job opportunities to the urban poor.

SUDAN* (6 November)

Prospects for 2002 crops, being harvested, are generally unfavourable. In southern Sudan, prospects were dampened due to continuous population displacements following a recent upsurge in conflict coupled with late and below-average rains in parts. The exception is West Equatoria Region where the first of two season crops was harvested in August and the second is just being planted, as is typical of the region.

Escalation of conflict in parts of southern Sudan is set to exacerbate an already poor food security situation due to continuing civil strife and adverse weather. Large numbers of people have been displaced and hundreds of thousands cut off from humanitarian access. Already an estimated 3 million IDPs, drought-affected and vulnerable people in different parts of the country depend on food assistance. A joint FAO/WFP Crop and Food Supply Assessment Mission has completed its field work in southern Sudan and is currently in northern Sudan to assess this year's overall crop harvest and food supply prospects for the 2002/03 marketing year.

TANZANIA (6 November)

Planting of the 2002/03 short season "vuli" crops in the bi-modal northern areas is underway. The 2002 total cereal production (maize, rice, wheat, sorghum and millet) at 4.3 (milled basis) million tonnes, is about 10 percent above last year's harvest due to favourable rains. Similarly, production of non-cereal crops (pulses, potatoes, cassava and plantains) is reported to be good.

The overall food situation remains satisfactory with increased on-farm stocks and market supplies. However, current wholesale prices for maize in major maize producing regions (including Rukwa, Mbeya, and Iringa in the Southern Highlands, and Dodoma in central Tanzania) were higher this month than the previous five-year average. Also, on some other markets such as Kilimanjaro and

Tanga (northern Tanzania), wholesale prices for maize have already started to rise at earlier dates relative to their five-year average trends.

WFP distributed over 3 900 tonnes of food in end-October to early-November to almost 529 000 refugees in Ngara, Kibondo, Kasulu and Lugufu camps.

UGANDA (6 November)

Delayed onset of the secondary season rainfall coupled with sharp increase in fighting in northern Uganda has severely affected the food supply situation with more than half a million people requiring immediate humanitarian assistance. Crop failure in the north-eastern region of Karamoja due to long dry spells in the recently concluded only cropping season of the region has also aggravated the food difficulties.

Pasture conditions in several districts of the country including Mbarara, Ntungamo and Rakai in south-western Uganda and Kotido, Moroto and Nakapiripirit in north-eastern Uganda have deteriorated due to severe moisture stress. However, minimal livestock migration to dry season grazing areas were reported. Recent rainfall in the south-western "cattle corridor" has also replenished water and pasture.

Overall stable crop prices continue to favour household access to food. However, the intensification of conflict and insecurity in northern parts have displaced a large number people, adding to the large IDP population. Nearly 1.5 million people are currently being assisted by WFP in several parts of the country.

SOUTHERN AFRICA

ANGOLA* (7 November)

Following normal to above-normal rains in October, which benefited planting and development of early sown 2003 maize crop, widespread dry weather in the first dekad of November hampered sowing of millet and sorghum in southern areas. More rains are needed.

The food situation of large numbers of displaced people gives serious cause for concern. Following the cease-fire agreement between the Government and UNITA forces in April this year, massive movements of people returning to their place of origin continue. The number of people in need of emergency food aid has been raised to 1.9 million from the 1.42 million estimated by the FAO/WFP Crop and Food Supply Assessment Mission in May 2002. Recent reports indicate that while malnutrition rates have declined with improved access to the needy population, they remain at high levels. Most of the areas to which the populations are returning have no basic health services. Despite the gradually improved accessibility to the provinces, poor road conditions, broken bridges and landmines continue to be a constraint to the expansion of relief assistance, as well as internal trade.

BOTSWANA (6 November)

Planting of the 2003 cereal crops, mainly sorghum is about to start. Early prospects are favourable reflecting abundant rains in the third dekad of October which benefited land preparation.

The 2002 cereal production was estimated at about 25 000 tonnes, which is a significant improvement from last season's output of only 12 000 tonnes. However, the country normally covers most of its cereal requirements through commercial imports. The cereal deficit in marketing year 2002/03 (April/March) is estimated by FAO at 266 000 tonnes. The food supply situation is stable reflecting adequate amounts of imports so far.

LESOTHO (6 November)

Abundant rains in southern and central parts in the third dekad of October and first week of November benefited planting of the 2003 cereal crops, mainly maize.

The food supply situation remains tight as a result of two consecutive reduced harvests. Some 650 000 people are in need of 36 000 tonnes of cereals as food aid in the period September 2002-March 2003. The districts most affected are Mokhotlong, Qacha's Nek, Quthing and Thaba Tseka. Food aid received in the country until the end of October amount to some 23 000 tonnes. Prices of cereals are on the increase at the same time as half of the rural households are running out of cereal stocks.

MADAGASCAR (7 November)

Planting of the 2003 cereal crops, mainly paddy, has started. Early prospects are favourable following good rains in late October and early November which improved soil moisture for field operations. However, more rains are needed in northern parts where unseasonable dry weather prevailed in the first week of November.

The 2002 paddy crop was estimated at the average level of 2.4 million tonnes. Despite the overall stable food supply situation, crops were sharply reduced in parts of the drought-prone southern area by dry weather. It is estimated that some 183 000 people in 13 districts, out of 89, in the Southern region are in need of food assistance as a result of a second consecutive poor harvest. The food situation is also tight for a large number of vulnerable people due the lingering effects of the political crisis in the first half of the year which severely disrupted economic activities, caused unemployment and resulted in sharp increases in food prices in urban areas. Following a Government appeal for international assistance, WFP will distribute 18 000 tonnes of food aid until next March to 394 250 people, including those most affected by the political crisis and those who gathered a poor harvest in southern districts and in eastern parts affected by Cyclone Kesiny earlier in the year.

MALAWI (7 November)

Generally dry weather in October and first week of November, particularly in central and northern parts, is delaying planting of the 2003 cereal crops, normally planted from the second half of October. Free distribution of agricultural inputs, mainly fertilizers, is progressing well.

The food supply situation remains tight following two consecutive poor cereal harvests. An FAO/WFP Crop and Food Supply Assessment Mission in April-May 2002 estimated the cereal deficit at 433 000 tonnes.

For WFP's food aid appeal of 171 000 tonnes of cereals for Malawi in the Southern Africa Regional Emergency Operation, the level of pledges by late October were adequate and 83 000 tonnes have already been received in the country. WFP stepped up its distribution in October, reaching approximately 2.3 million beneficiaries. This figure represents more than a 100 percent increase from September. Against commercial imports of maize, estimated by an FAO/WFP Mission in April-May at 225 000 tonnes, the Government has made arrangements to import 351 000 tonnes of maize, including replenishment of the Food Security Reserve. By mid-September 71 000 tonnes had arrived in the country. Prices of maize, which have declined from their peak in March, had started to increase from August but early October they have remained generally below their levels of last year.

MOZAMBIQUE (6 November)

Excessive rains in the first week of November in southern parts, mainly in Inhambane province, following two cyclones in the Indian Ocean, resulted in localized floods but in general benefited soil conditions for planting of the 2003 cereal crops. By contrast, dry weather prevailed in the main maize growing northern areas, where more rains are needed. Overall, early prospects for planting are favourable, reflecting widespread good rains in the third dekad of October and high levels of maize prices.

The overall food supply situation remains stable following the good cereal harvest of 2002 that resulted in exportable surpluses in northern parts. Prices of maize which have increased sharply since August, stabilized in October. However, in the capital Maputo they are above their level of a year ago. The increase in prices reflects steady internal demand and substantial exports to deficit neighbouring countries.

The food situation remains difficult in southern provinces and parts of the central and northern provinces, where cereal production declined by 34 percent from the reduced level of the previous year, and 590 000 people are estimated to be in need of relief assistance. Emergency food aid requirement for the period September 2002-March 2003 are estimated at 49 000 tonnes. Food aid in WFP pipeline is adequate to cover requirements until February. However, distributions have been delayed because low capacity of implementing partners.

NAMIBIA (7 November)

Abundant rains in the third dekad of October and first week of November in northern growing areas, benefited land preparation for planting of the 2003 crop scheduled in late November.

The food supply situation is tight for large numbers of people in rural areas following two consecutive reduced cereal harvests. While most of the deficit in marketing year 2002/03 (May/April) estimated at 156 000 tonnes, is expected to be covered on commercial basis, some 345 000 most vulnerable people face food shortages and are in need of food assistance until the next harvest. The Government plans to distribute 30 000 tonnes of cereals to the affected population and has allocated up to US\$ 14 million for the emergency operation.

SOUTH AFRICA (1 November)

Harvest of the 2002 winter crops is well advanced and planting of the 2003 summer coarse grains has started. Latest production forecast of the 2002 wheat crop have been revised downward to some 2.3 million tonnes, 8 percent lower than the good crop of the last year but still average. The decline in production mainly reflects lower yields. By contrast, the minor barley crop is expected to increase by 15 percent due to higher plantings and yields.

Prospects for planting of the 2003 maize crop are favourable following abundant rains in the main growing areas in the third dekad of October, as well as expectations of higher plantings. Official reports on the first planting intentions indicate an increase of 9 percent in the area planted to maize to 3.081 million hectares. This reflects a rise of 19 percent in the area to white maize and a decline of 7 percent in the area to yellow maize. The increase in sowings is in response to higher price expectations, crop rotation practices and increased demand for white maize in other Southern Africa countries. Plantings of minor sorghum crop are expected to increase by 14 percent from last year's level to 86 000 hectares.

SWAZILAND (6 November)

Abundant rains in the last dekad of October and first week of November, benefited planting of the 2003 cereal crops, which has started.

The food supply situation is difficult as a result of three consecutive years of below-average harvests. Some 265 000 people are estimated to be in need of food assistance until next harvest. Against a food aid requirement of some 20 000 tonnes of cereals, 11 500 have been received in the country by early October. Additionally, the Government has distributed 500 tonnes.

ZAMBIA (7 November)

Abundant rains in southern and central parts in the third dekad of October and first week of November benefited planting of the 2003 cereal crops, mainly maize. However, more rains are needed in north-eastern parts where unseasonable dry weather prevails. To support this season's maize production, following two consecutive poor harvests, the Government has implemented a programme to distribute 48 000 tonnes of fertilizers at subsidized prices to 120 000 small farmers.

Harvesting of winter maize, provisionally estimated at 15 000 tonnes, is temporarily easing the tight food supply situation following the reduced 2002 main season maize output and delayed commercial imports and food aid distributions. Against maize import requirements in marketing year 2002/03 (May/April) of 575 000 tonnes, planned commercial imports by private millers amount to 150 000 tonnes and the Government issued granted tenders to private traders for additional 300 000 tonnes. However, imports received in the country are much lower and by early November amounted to about 50 000 tonnes - mostly informal trade from Mozambique and Tanzania. Prices of maize, which have increased moderately since June, remained stable during October. However, the situation could deteriorate rapidly as millers stocks are expected to last only until early next year.

The number of people in need of relief assistance is estimated at 2.9 million, or one-quarter of the population. The food situation is particularly serious for vulnerable groups in remote areas which have exhausted their food stocks. While WFP monthly food aid requirements are 21 000 tonnes, only half of the targeted population could be reached in October due to shortages in the food aid pipeline. Food distributions are likely to be further delayed by the Government's decision in late October to refuse food aid supplies produced with genetically modified organisms (GMO's). WFP is using recent cash contributions to purchase non-GM commodities in the region while removing some 15 000 tonnes already in the country and re-allocating to other countries of the sub-region which have accepted GM grain. There is urgent need to find alternative sources of food.

ZIMBABWE* (7 November)

Above-normal precipitation in October and first week of November, particularly in central and eastern parts, provided adequate soil moisture for planting of the 2003 cereal crops, which has started. However, prospects are poor reflecting disruption in the agricultural sector following land acquisition activities and prices of seeds beyond the reach of large numbers of farmers.

The grave food situation is worsening, following a sharply reduced maize harvest coupled with the country's prevailing economic crisis. Shortages of basic foods including bread, maize, milk and sugar are reported in urban and rural areas, with bakeries closing due to lack of wheat. Increasing cases of malnutrition are reported from different locations. About half of the population, or 6.7 million people, are in need of emergency food assistance until next March, mostly in rural areas. Against an exceptional maize deficit of some 1.7 million tonnes in marketing year 2002/03 (May/April) the Government announced contracts for almost 1 million tonnes at the end of September, but by late October, only 480 000 tonnes had been received. Food aid received reached 167 000 tonnes. Food aid distributions are being delayed as a result of controversies with the Government about the politicisation of the assistance and the ban on several WFP implementing partners. WFP suspended all its distributions in

several areas in October. In urban areas, soaring inflation which reached 137 percent by the end of September and continuous deterioration of the economy have further curtailed access to food for the majority of the population.

There is urgent need to expedite commercial imports and delivery of additional food assistance to avoid a further deterioration of the country's food security situation.

ASIA

AFGHANISTAN* (6 November)

The winter cropping season has begun under favourable weather conditions. Recent rainfall and snowfall in some areas are expected to assist land preparation. An FAO/WFP Crop and Food Supply Assessment Mission visited Afghanistan from 15 June to 13 July 2002 and forecast the 2002 total cereal production at about 3.59 million tonnes (milled basis), comprising 2.69 million tonnes of wheat, 345 000 tonnes of barley, 298 000 tonnes of maize and 260 000 tonnes of milled rice. At this level, cereal production is about 82 percent above last year's drought affected crop but about 4 percent below the good crop of 1998. As a result, the cereal import requirement in the 2002/03 (July/June) marketing year is estimated at 1.38 million tonnes, about 38 percent below the previous two years' volume. Commercial imports are estimated at 911 000 tonnes, similar to the average level of the previous three years. Emergency food aid in pipeline and pledges amounts to 219 000 tonnes, leaving an uncovered gap of about 249 000 tonnes.

However, despite the recovery in this year's agricultural production millions of Afghans, particularly pastoral Kuchis, have little access to food due to serious erosion of their purchasing power and/or loss of productive assets. Effects of successive years of drought, deteriorating irrigation and other infrastructure, inability of farmers to access necessary agricultural inputs, lack of employment within and outside agriculture, and serious rural indebtedness render timely and effective intervention all the more essential. Sustained investment in the agricultural sector, particularly the rehabilitation, upgrading and maintenance of the irrigation infrastructure is essential for speedy recovery of the Afghan economy.

ARMENIA (4 November)

This year's cereal harvest, estimated at 414 000 tonnes, is similar to the substantially recovered harvest of 2000/01 marketing year. The estimated harvest includes 340 000 tonnes of wheat, 62 000 tonnes of barley and 6 000 tonnes of maize. Cereal import requirement for 2002/03 estimated at 344 000 tonnes is similar to last year's actual import and includes 280 000 tonnes of wheat, 27 000 tonnes of maize and 12 000 tonnes of rice.

AZERBAIJAN (4 November)

Cereal harvest is nearly complete and estimated at more than 2.4 million tonnes this year, which is nearly 400 000 tonnes higher than 2000/01 harvest. This year's harvest includes 1.9 million tonnes of wheat, 292 000 tonnes of barley and 150 000 tonnes of maize. Area planted to cereals increased from 690 000 hectares in 2000/01 marketing year to 804 000 hectares this year. Most of the Cereal import requirement for 2002/03 marketing year, which is estimated at 629 000 tonnes, will be commercially procured. However, the most vulnerable and internally displaced population will continue to depend on targeted food assistance.

BANGLADESH (14 November)

Despite flood damage to paddy fields in July and August, the outlook remains good for the Aman paddy crop currently being harvested. Reflecting generally favourable growing conditions, a higher use of inputs and an increase in the producer price, the outcome of the harvest is provisionally

forecast at 16.0 million tonnes, similar to the Aman crop of last year. Together with the Aus paddy crop harvested in August, estimated at 3.0 million tonnes and a tentative forecast of 19.5 million tonnes for the irrigated Boro crop to be planted from late-November into January, the aggregate paddy output in 2002/03 is provisionally forecast at a record 38.5 million tonnes or 25.7 million tonnes of milled rice. Planting of the wheat crop to be harvested in March-April 2003 is about to start.

The overall food supply situation remains satisfactory, reflecting adequate levels of government-held food grain stocks and good harvest prospects. With the targeted record cereal production, the 2002/03 (July/June) import requirement is forecast to continue the falling trend of the past years to 1.5 million tonnes (wheat 1.3 million tonnes and rice 0.2 million tonnes). However, flood victims and vulnerable groups continue to require food relief, while assistance for the provision of seeds for the Boro season is also needed to rehabilitate food production.

CAMBODIA (19 November)

The outlook is uncertain for the rainfed main season paddy crop, normally accounting for 80 percent of annual rice output. In June, rainfall was below normal and in July developed into drought in most parts, with crops in southern and central regions being worst affected. Rain from mid-August brought some relief, but latest reports indicate that the area planted to the main paddy crop is some 7 percent below that of last year and the production similarly reduced. Some of the early-planted paddy fields are presently being harvested, but the main harvest takes place in December and January. For the dry season crop, due for planting from late November through January, Government is promoting an increase in the irrigated area by 200 000 hectares. An above-average output from this crop is expected to offset part of the decline in the main paddy crop. Thus, the aggregate paddy production for consumption in 2003 is provisionally forecast at some 3.8 million tonnes or 2.4 million tonnes of milled rice, about 7 percent below the record crop of the previous year. The output of other food crops, such as maize, pulses and roots and tubers, is estimated at the same level as last year or slightly above.

This production will be sufficient to secure an adequate food supply situation at the national level. However, the Government reports that drought and floods in 2002 affected some 650 000 people who would require food assistance. Furthermore, even in years with normal weather conditions, an estimated 36 percent of the population lives below the poverty line and is chronically food insecure and in need of food relief.

CHINA (14 November)

The 2002/03 winter wheat was planted in September-October under favourable conditions except in the important grain-growing province of Shandong. This province, which in 2002 accounted for 17 percent of the national output of wheat, was hit by abnormally dry weather in August and September 2002 leaving a low level of soil moisture at planting time. Tentatively, the national area sown to winter wheat is expected to be 20.9 million hectares, 2.8 percent below that of the previous year. Meanwhile, the production of wheat in 2002 has been revised upwards to 89.3 million tonnes from the earlier estimate of 88 million tonnes. This reflects a larger than expected outcome of the winter wheat harvested in May-June, now estimated at 83 million tonnes, while that of spring wheat remains unchanged at 6.3 million tonnes. Nevertheless, the aggregate 2002 production remains 5 percent below that of 2001 and 17 percent below the average of the past 5 years.

Harvesting of maize was completed in early October. The provisional estimate of the harvest has been lowered slightly to 125.2 million tonnes on account of the dry spell in Shandong during August and September. Though this is still about 10 percent above the previous year, due to favourable weather elsewhere and expectations of bumper harvests in Jilin and Heilongjiang provinces, the final output could be higher, possibly matching the record crop of 133.2 million tonnes gathered in 1998. Reflecting the favourable crop prospects and high export prices, the 2002 exports of maize are expected to increase and could be close to 10 million tonnes.

The late season rice crop of the south is presently being harvested. As a result of a reduction in the area planted and slightly lower yields, the output from the late crop is forecast at 36 million tonnes of paddy, about 9 percent below the previous year. The early rice crop was also lower than that of last year as was the paddy output in the Chinese province of Taiwan. However, these reduced outputs were partly offset by a 4 percent increase from last year in the main crop harvested in September to early October. Thus, the latest estimate of aggregate paddy production in 2002 is 177.5 million tonnes (121.7 million tonnes of milled rice), slightly less than the previous year and 9 percent below the average of the past 5 years.

CYPRUS (6 November)

Sowing of the 2003 wheat and barley crops has commenced. Aggregate cereal output in 2002 is provisionally forecast at 82 000 tonnes, about the same as the previous five year's average.

Imports of wheat in 2002/03 (May/April) are forecast at 100 000 tonnes, while aggregate imports of barley and maize are forecast at some 540 000 tonnes, unchanged from last year.

EAST TIMOR (7 November)

Maize is the main staple of the country. It is grown under a slash and burn system and is mostly inter-planted with other food crops. Sowing of the main maize crop for harvest during February-April 2002 is underway. The availability of seeds is reported to be adequate and with improved security conditions an increase in the area planted may be expected. However, there is some uncertainty about the seasonal weather developments as the effects of El Niño, although expected to be weak, could cause below normal rainfall. The major rice crop is due for planting from December.

Although no firm data are available on food crop production in 2002, the aggregate output of food crops, including roots and tubers and pulses, was estimated to be close to normal and adequate to cover national consumption requirement. However, incidents of food shortages and malnutrition, notably among returning refugees, have been reported and need close monitoring until the new harvest becomes available in February-March 2003.

GEORGIA (4 November)

Latest reports indicate a somewhat disappointing cereal harvest of 677 000 tonnes in 2001/02 marketing year, which is about 40 000 tonnes less than the poor harvest of the preceding year. Cereal harvest this year includes 216 000 tonnes of wheat and 400 000 tonnes of maize. Maize harvest improved somewhat due to improved precipitation during summer. Food aid would once again be necessary to fill the gap between consumption needs and supply.

WFP has distributed some 3 101 tonnes of food to 43 782 beneficiaries under 151 Food for Work (FFW) projects between August and September this year. The FFW projects were for land reclamation and rehabilitation of irrigation systems in 31 districts. The current PRRO is scheduled to end by March 2003. Following crop failure in Mestia district, western Georgia, WFP plans to distribute some 250 tons of food to 11 000 people, who are most affected.

INDIA (14 November)

The 2002 Kharif season was marked by an erratic southwest monsoon, which caused floods in many areas and a drought in northwestern states, seriously affecting agricultural production. Harvesting of the Kharif cereal crops is still underway. Preliminary government estimates point to a decline in the Kharif harvest by 18 percent from the previous year, to the lowest level for 14 years. The output of paddy is provisionally estimated at 106 million tonnes, which together with a forecast Rabi paddy crop of 19 million tonnes to be harvested in March-May 2003 gives a preliminary estimate of the 2002/03 marketing year paddy production of 125 million tonnes (83.3 million tonnes of milled rice). The Kharif coarse grain production is expected to be even worse affected with a drop of 24 percent from last year's output of 27.1 million tonnes to 20.6 million tonnes this season (maize

9.8 million tonnes, sorghum 3.9 million tonnes and millet 6.9 million tonnes). Planting of the Rabi rice and winter wheat crops for harvest in March-May 2003 is underway, favoured by above-average pre-planting rains during October.

Following the devastating floods in several states, local and international organizations along with the Government continue to provide food relief and medical assistance to the affected populations, while food-for-work programmes for drought stricken people are being implemented by the concerned state governments.

Despite the reduced cereal production and food deficits in many areas, the overall national food supply position remains satisfactory with the country holding large cereal stocks accumulated over the previous years of good harvests. To reduce the financial burden of the large stockpile, the Government continues to promote exports of wheat and rice, which for 2002/03 are forecast at 4.7 million tonnes and 4.5 million tonnes, respectively. This makes the country the second largest exporter of rice and the sixth largest of wheat. In addition, India has donated 1 million tonnes of wheat for WFP's under-funded emergency operation in Afghanistan, the largest single pledge in WFP's history.

INDONESIA (11 November)

Planting of the main season paddy and maize crops to be harvested from March 2003 is underway. Despite recent below-normal rainfall, the area planted to both crops is expected to remain at the same level as the previous year. To encourage domestic production of rice, the main staple, and slow down imports, the Ministry of Agriculture has proposed to increase import tariffs on rice, while the floor price for paddy may also be raised.

The latest estimate of aggregate output of paddy in 2002 is 50.8 million tonnes (32 million tonnes milled rice), slightly above 50.5 million tonnes produced in 2001, while maize production is estimated at 9.8 million tonnes. For the 2002/03 marketing year (April/March), rice imports are forecast at 3.2 million tonnes of which 1 million tonnes to be imported by BULOG (National Logistics Planning Agency) and some 2.2 million tonnes by private importers. Imports of wheat, which is not grown in the country, is estimated at 4 million tonnes, mainly for the production of noodles, but also to meet the expanding market for bread. The 2002 maize production is estimated at 9.8 million tonnes, which needs to be supplemented by imports of 1.4 million tonnes to cover the increasing demand for feed for the poultry industry.

Despite an overall satisfactory food supply situation, a large number of the poorest Indonesians, internally displaced people and refugees face hunger and malnutrition. To meet part of their needs, WFP is providing relief to 2.1 million most affected people until the end of 2003.

IRAN, ISLAMIC REPUBLIC OF (8 November)

Planting of winter wheat for harvest in June-July 2003 is almost complete. Following recent precipitation and adequate irrigation reservoir levels, the area planted is expected to be somewhat above that of the previous year. Planting of winter barley is underway and will continue through December. There are plans to increase the production of paddy by 30 percent in 2003 by promoting the use of hybrid and improved seeds.

Reflecting favourable growing conditions, the latest estimate of the 2002 cereal production is 17.3 million tonnes (wheat 11.8 million tonnes, coarse grains 3.3 million tonnes and paddy 2.2 million tonnes) 25 percent above 13.8 million tonnes produced in 2001. As a result, cereal imports in the 2002/03 marketing year (April/March) are expected to decline to some 5.8 million tonnes from their high levels of about 10 million tonnes over the past three years.

IRAQ* (6 November)

Planting of the 2003 cereal crops, which normally starts in the second half of October, is underway. Cereal output (mainly wheat and barley) in 2002 is forecast at 1.4 million tonnes, about 15 percent above last year due to improved precipitation compared to the previous three years.

The United Nations Security Council passed on 14 May 2002 a new resolution that introduced comprehensive changes aimed at speeding up the processing and approval of civilian goods submitted for contracts under the oil-for-food programme.

ISRAEL (6 November)

Planting of the year 2003 wheat and barley crops, to be harvested during April/May next year, is underway. Production of the wheat crop in 2002 is forecast at 180 000 tonnes, nearly 75 percent above the average for the previous five years. Imports of cereals in 2002/03 (July/June) are forecast at some 2.7 million tonnes.

JAPAN (4 November)

Harvesting of the 2002 paddy crop is almost complete. Following favourable growing conditions, above-normal yields are expected in most areas. However, reflecting the government efforts to reduce the rice area, the output of paddy is, nevertheless, forecast to decline by 1 percent from 2001 to 11.2 million tonnes (8.1 million tonnes milled rice). The winter wheat for harvest in June-July 2003 is presently being planted.

The import requirement for 2002/03 is provisionally forecast at 26.5 million tonnes, of which 19.9 million tonnes of coarse grains, 5.9 million tonnes of wheat and 0.7 million tonnes of rice, virtually unchanged from the previous year.

JORDAN (6 November)

Sowing of the 2003 wheat and barley crops, for harvest in May/June next year, is underway. Aggregate output of wheat and barley in 2002 is forecast at 133 000 tonnes, nearly three times last year's reduced crop due mainly to favourable rainfall. Domestic cereal production normally meets only a small proportion of consumption requirements, the rest being covered by imports. Imports of wheat in 2002/03 (July/June) are forecast at 840 000 tonnes, slightly lower than last year.

KAZAKHSTAN (5 November)

Cereal harvest campaign is nearly complete and estimated at more than 14.4 million tonnes in 2002/03 marketing year compared with 15.9 million tonnes the previous year. This year's harvest consists of 11.6 million tonnes of wheat, 1.9 million tonnes of barley and 300 000 tonnes of maize. Cereal exports for 2002/03 marketing year is estimated at about 6 million tonnes compared with 4.2 million tonnes last year. Cereal exports this year include 5.5 million tonnes of wheat, 387 000 tonnes of barley and 16 000 tonnes of maize. The main export destinations are the neighbouring CIS countries and increasingly the Middle East.

KOREA, DEMOCRATIC PEOPLE'S REPUBLIC OF* (19 November)

Planting of the 2002/03 winter wheat and barley crops was completed in October. Reflecting a projected increase of about 10 percent in the area planted, the harvest in June 2003 is expected to improve over last year, despite a slight decline in forecast yields.

An FAO/WFP Crop and Food Supply Assessment Mission visited the country from 24 September to 5 October to assess the 2002 main cereal harvest, make a provisional forecast of the 2002/03 winter/spring crops and estimate the cereal import requirement for the 2002/03 marketing year (November/October) including food aid needs. The Mission concluded that the outcome of the 2002 main season cereal harvest, including rice in milled form and

potatoes in cereal equivalent, was 3.45 million tonnes. Together with a forecast of the winter/spring harvest in June 2003, the cereal production available for the 2002/03 marketing year (November/October) is tentatively estimated at 3.84 million tonnes (milled basis). This is 4.9 percent above the output of the previous year, mainly reflecting relatively favourable rainfall, improved irrigation, international assistance with the provision of fertilizers and pesticides and priority given by the Government in timely allocation of seeds and other farm inputs to the agricultural sector.

Despite the improved harvests in 2001 and 2002, domestic food production continues to fall short of the country's minimum needs. For 2002/03 (November/October) the deficit is estimated at 1.08 million tonnes of cereals. Against this requirement, the commercial import capacity is estimated at only 100 000 tonnes, leaving a food aid need in cereals of 0.98 million tonnes for the coming 12 months. Part of this is already covered by concessional imports of 300 000 tonnes and food aid pledges of 126 000 tonnes. Thus, there remains an uncovered deficit of 558 000 tonnes which needs to be met by additional food aid pledges and/or concessional imports. Based on vulnerability analyses, the Mission recommended the mobilization of 512 000 tonnes of food aid (429 000 tonnes of cereals and 83 000 tonnes of other food) for 6.4 million people in the coming year. Presently, food aid stocks held by the WFP are all but depleted and only 27 000 tonnes of pledges are in the pipeline. To avert already widespread hunger and malnutrition developing further, donor allocations of some 126 000 tonnes of food aid are urgently required to cover the WFP operation for the remainder of the year and the first 3 months of 2003.

KOREA, REPUBLIC OF (8 November)

Harvesting of the 2002 paddy crop is almost complete. The Government provisionally estimates the outcome of the harvest at 6.8 million tonnes (some 5 million tonnes milled rice), 8 percent lower than 7.5 million tonnes harvested in 2001. This decline is partly due to adverse weather, but also reflects policy measures to limit the area under rice and thus reduce the surplus production and large stocks of rice, the latter of which could reach 1.9 million tonnes at the end of 2002. The country also has a minor production of feed grains, the most important being barley, which is grown as a winter crop. Annual output of these grains is estimated at 0.4 million tonnes.

Cereal imports in the 2002/03 marketing year (October/September) are forecast at 3.9 million tonnes of wheat, 8.2 million tonnes of maize and 0.5 million tonnes of other grains, an overall decline of 4 percent from the previous year.

KYRGYZ REPUBLIC (5 November)

Latest reports point to about 1.85 million tonnes of cereal harvest this year, which compares with 1.8 million tonnes in 2001. Cereal harvest this year includes 1.3 million tonnes of wheat and 533 000 tonnes of coarse grains (barley and maize). Cereal import requirement in 2002/03 marketing year is estimated at 179 000 tonnes, which will be commercially procured, while exports are estimated at 35 000 tonnes.

LAOS (15 November)

The 2002 wet season paddy crop planted in mid-May to early-July is presently being harvested. This crop, which is predominantly grown in the Mekong River basin, accounts for about 85 percent of annual cereal production. The remainder is produced under irrigation during the dry season, being planted from mid-November into January and harvested in April. In recent years the proportion of high yielding varieties has increased, resulting in a rising trend in production. The outcome of the paddy crop for consumption in calendar year 2003 is provisionally forecast at 2.4 million tonnes (1.4 million tonnes milled rice), which is slightly higher than the good production of the previous year. A small amount of maize is also being produced.

One third of the country's population exists outside the money economy and 85 percent depends on subsistence agriculture. Thus, despite a marked increase in cereal production in recent years, the food supply situation remains precarious among large sections of the population, notably in upland areas. These vulnerable groups continue to suffer from chronic food insecurity and are in need of additional food supplies. Part of their requirements is being met by food assistance through WFP.

LEBANON (6 November)

The planting of the wheat and barley crops is underway. However, domestic cereal production usually covers only about 10 percent of the consumption requirements. Aggregate production of wheat and barley crops in 2002 is estimated at 86 000 tonnes, about the same as last year. Imports of wheat in 2002/03 (July/June) are forecast at some 0.5 million tonnes, similar to last year.

MALAYSIA (7 November)

The main season paddy crop is developing under average to above average rainfall conditions. Harvesting will start in mid-December and continue until April 2003. This harvest accounts for about 60 percent of annual paddy production and provisionally is expected to be about average. Assuming normal growing conditions for the secondary crop accounting for 40 percent of production and to be harvested from July 2003, an aggregate production of 2.1 million tonnes of paddy (1.4 million tonnes milled rice) is forecast, about the same as the previous year. This production covers about two thirds of domestic rice utilization in 2003, while the remainder needs to be covered by imports of some 0.7 million tonnes. The import requirement of wheat and maize for 2002/03 is estimated at 1.4 million tonnes and 2.4 million tonnes, for the two grains respectively, similar to imports of the previous year.

MONGOLIA* (4 November)

The 2002 cereal crop, mainly wheat but also small amounts of barley, was harvested in September. Despite an increase in the area planted this season, less than 50 percent of normal rainfall and scorching temperatures during the growing period seriously affected yields. The latest estimate of cereal output is 161 000 tonnes, less than 25 percent of annual cereal production of the early 1990s. Production of potatoes and other vegetables is also reported to be much below normal. The dry conditions also severely affected the already disaster-hit pastoralists, whose herds have been decimated following three years of harsh winters and dry summers.

To cover domestic consumption requirements for the 2002/03 marketing year (October/September) the country will need to import an estimated 220 000 tonnes of wheat, while imports of some 15 000 tonnes of rice will also be required. Given that the country has a serious balance of payment problem, commercial imports will only cover part of this requirement and allocation of food aid will be necessary to meet the deficit.

MYANMAR (14 November)

Harvesting of the 2002 main season paddy crop is underway and the secondary crop to be harvested from March 2003 is being planted. Following close to average rainfall and only minor flood damage to crops, an about average outcome of the main season harvest is expected. Assuming normal growing conditions also for the secondary crop, the early outlook for the aggregate 2002/03 marketing year paddy output points to a production of 21.8 million tonnes (13.9 million tonnes of milled rice), similar to last year. Planting of wheat and coarse grains to be harvested from February 2003 is also underway. Tentatively, the output of these minor food grains is estimated at some 90 000 and 540 000 tonnes, respectively. Reflecting the marked increase in rice production in recent years, the country has re-entered the world market as a major rice exporter, with an estimated 1 million tonnes of rice being exported in 2002.

NEPAL (6 November)

Harvesting of the 2002 rice crop is underway and will continue into December. The outcome of the harvest is provisionally forecast at 4.0 million tonnes of paddy (2.6 million tonnes of milled rice), some 4 percent below the bumper crop of 4.2 million tonnes in 2001, but still above average. The maize crop was harvested in August-September, while harvesting of millet is still ongoing. The aggregate output of coarse grains is expected to remain at about last year's level of 1.8 million tonnes. Planting of winter wheat for harvest from March 2003 has started and will be completed by early December.

The country's agricultural sector accounts for over 35 percent of GDP and provides for more than 75 percent of employment. Most of the agricultural production is rainfed and takes place in the narrow strip of lowland in the south, along the border with India. The 2002 monsoon rain was heavier than normal and was followed by widespread floods and landslides, notably in eastern and central parts of the country, affecting an estimated 300 000 people and causing more than 500 deaths. Extensive damage to infrastructure was reported, but though large areas of fertile farmland were affected, overall, the impact on cereal production was expected to be minimal. Relief operations in favour of the flood and landslide affected population is ongoing, while the WFP is providing food assistance to the country's food sufficiency programmes and to Bhutanese refugees living in camps.

PAKISTAN (6 November)

Above-average precipitation in September, partly offset poor rainfall in July and August and significantly improved prospects for the 2002 Kharif harvest. Thus, the forecast output of the paddy crop, which is presently being gathered, has been increased to 5.9 million tonnes (3.9 million tonnes milled rice), 5 percent above the previous season, but still slightly below average. Rice exports for 2002 are estimated at 1.4 million tonnes, about 40 percent below 2.3 million tonnes exported in 2001, while the rice export target for 2003 is tentatively kept at the same level as that of 2002, 1.4 million tonnes.

The 2002 coarse grain crop, harvesting of which is almost completed, also benefited from the good late season rainfall and is now estimated to yield an average production of some 2.1 million tonnes, unchanged from the previous year.

Planting of the winter (Rabi) wheat, which is mainly grown under irrigation, started last month and will continue through December. Reflecting adequate soil moisture and sufficient availability of irrigation water, the outcome of the harvest in April-May 2003 is tentatively forecast at 19.8 million tonnes. The country is expected to have exported from the 2002 crop some 1 million tonnes of wheat by the end of December, at which time the government will review its stock position to determine the export availability for next year.

Over the past few years, Balochistan and parts of Sindh provinces received much below-normal rainfall, eventually leading to drought. Assistance to the drought-affected population is being provided through a WFP Emergency Operation. In addition, WFP food assistance to Afghan refugees awaiting repatriation continues to be required. On 31 October 2002, a WFP Emergency Operation was approved for providing humanitarian assistance to 288 000 Afghan refugees in the border areas inside Pakistan for an additional 12 months.

PHILIPPINES (11 November)

Harvesting of the 2002 main season paddy crop is underway and should be completed by mid-December. Following dry conditions in May the area planted to paddy was below average and early growth was affected in the key producing regions of Luzon. However, beneficial rainfall later in the season improved growing conditions, offsetting the earlier damage to the crop. Thus, with a good outcome of the secondary irrigated crop, harvested earlier, the aggregate 2002 paddy crop is provisionally forecast at 13.1 million tonnes (8.6 million tonnes of milled rice), similar to the good crop in 2001. The irrigated rice crop for harvest from mid-January to March 2003 is presently being planted. To increase rice production and attain a higher self-sufficiency rate, the Government is making funds available i.a. to finance the expansion of the area under irrigation and to ensure the

availability of hybrid seed varieties. Presently, the Government has set a production target for 2003 in excess of 14 million tonnes of paddy. The output of maize in 2002 is estimated at 4.5 million tonnes, some 2 percent below that of the previous year. The country does not produce wheat.

Reflecting the lower rice production, imports in 2002 are expected to reach 1.2 million tonnes. Furthermore, the Government plans initially to import 0.8 million tons in 2003 to increase the country's buffer stocks to guard against a possible El Niño induced shortfall in rice supplies next year. Imports of wheat and maize in 2002 are estimated at 3.4 and 0.4 million tonnes, respectively.

SAUDI ARABIA (6 November)

The wheat crop for harvest in April/May next year is now being planted. Production of wheat in 2002 is estimated at 1.8 million tonnes, similar to last year, which together with stocks, will be sufficient to cover the country's requirements. Total import of cereals in 2002/03 (July/June) is currently estimated at about 7.5 million tonnes, including about 5.1 million tonnes of barley.

SRI LANKA (3 November)

Planting of the 2002/03 Maha paddy crop started in September and will finish in December. The 2002 irrigated Yala rice crop harvested in August-September is estimated to be below average, following a dry spell during the maturation stages. This crop normally accounts for one third of annual rice production, with two thirds being produced during the Maha season harvest in February-March. Subject to the final outcome of the Yala harvest, the aggregate 2002 paddy production is provisionally estimated at 2.7 million tonnes unchanged from 2001. This output falls short of domestic demand and has to be supplemented by imports, which for 2002 are estimated at 140 000 tonnes. The import requirement of wheat and maize is estimated at 850 000 tonnes and 130 000 tonnes, respectively.

Drought conditions persist in southern parts of the country for the third year in succession and drought assistance continues to be provided through national and international relief organizations.

SYRIA (6 November)

Recent light showers in parts of the country prompted planting of winter grains. Sowing of the 2003 wheat and barley crops is expected to continue until mid-January.

The output of wheat in 2002, now being harvested, is forecast at 4.5 million tonnes about 27 percent above the average for the previous five years. The barley harvest is also estimated to be above average. Import of wheat in 2002/03 (July/June) is forecast at about 65 000 tonnes, whilst rice imports are forecast at 170 000 tonnes.

TAJIKISTAN (4 November)

Latest official reports point to a cereal harvest of 614 000 tonnes, which is some 272 000 tonnes higher than the drought reduced harvest of 2001. A joint FAO/WFP Crop and Food Supply Assessment Mission visited Tajikistan in late June and found that weeds and smaller area planted to cereals due to lack of inputs and perceived continuation of drought were the main reasons for lower than planned harvest.

WFP estimates that some 1.5 million people will require food assistance during the ensuing year. An estimated 206 000 tonnes of food aid will be required to fill the gap between food availability (production and estimated commercial imports) and consumption needs for the 2002/03 marketing year.

THAILAND (12 November)

During this year's monsoon season, heavy rainfall, flash floods and strong spring tides damaged property and infrastructure and swamped farmland in over 50 of the country's 76 provinces. Some 2.5 million people were affected and 151 deaths were reported.

Harvesting of the 2002 main paddy crop started in October and will continue into January. Favourable growing conditions from June through August benefited early development of the crop, while floods in September and October caused only minor damage to the paddy. Provisionally, the outcome of the harvest is estimated at 20.0 million tonnes, 4 percent below the excellent crop of the previous year. The main crop accounts for about 75 percent of annual rice production. The remainder is produced mainly under irrigation, being planted in January-March and harvested in May-July. Assuming an about average output from the secondary crop, the total 2002/03 output of paddy is tentatively forecast at 25.8 million tonnes (17.1 million tonnes milled rice). Harvesting of coarse grains, mainly maize, is drawing to a close and an output of 4.1 million tonnes is expected. This is about 12 percent below 4.7 million tonnes produced in 2001, reflecting a decline in the area planted and lower yields as a result of dry conditions in some of the maize growing areas in the north.

Following bumper rice crops in recent years, exports have been at record levels. In 2002, shipments during the early months of the year were extremely encouraging, but recently, closures of new sales contracts have slowed down. Thus, the latest estimate of aggregate rice exports in 2002 has been lowered from the earlier forecast by 0.5 million tonnes and now stands at 7.0 million tonnes.

TURKEY (6 November)

Sowing of the 2003 wheat crop is underway. Output of the 2002 wheat crop is now estimated at 17.5 million tonnes compared to 16 million tonnes in 2001. Good winter rains and snow cover have helped boost yields.

Wheat imports in the current 2002/03 (July/June) marketing year are expected to be around one million tonnes. Maize imports are also forecast to decrease by nearly 200 000 tonnes to about one million tonnes.

TURKMENISTAN (4 November)

Cereal harvest this year is officially estimated at an unprecedented 2.3 million tonnes, which is some 1.1 million tonnes higher than the average harvest of the past six years. Cereal harvest in 2002 includes about 2.19 million tonnes of wheat, 60 000 tonnes of barley and 25 000 tonnes of maize. Cereal utilisation totals about 1.9 million tonnes.

UZBEKISTAN (4 November)

Latest reports point to a sharply recovered cereal harvest of about 5.3 million tonnes in 2002, which is some 1.4 million tonnes higher than the preceding year and the average harvest of the past six years. This year's harvest includes some 4.9 million tonnes of wheat, 160 000 tonnes of barley and 120 000 tonnes of maize. Larger areas grown to cereals, at the expense of cotton, improved precipitation and water availability are the main factors contributing to this year's improved cereal harvest.

Uzbekistan will be able to meet most of its cereal consumption needs, which is estimated at about 5.2 million tonnes. Cereal imports for 2002/03 marketing year is estimated at 412 000 tonnes, mainly high quality wheat (280 000 tonnes), rice (104 000 tonnes) and maize (20 000 tonnes).

VIET NAM (7 November)

Again in 2002, torrential rains, floods and tropical storms caused extensive damage to private property and infrastructure and loss of more than 200 lives, notably in the provinces of the mountainous north and in the southern Mekong Delta. Local relief organizations are providing assistance to the most seriously affected populations.

Harvesting of the summer-autumn crop is almost completed, while that of the 10th month crop will continue into January 2003. The outlook for these crops is mixed. Some losses to the summer-autumn crop due to flooding were reported from the Mekong Delta, while dry conditions in July in central parts of the country affected several thousand hectares of paddy fields. These dry conditions also disrupted sowing and early development of the 10th month crop. While there is still uncertainty about the final outcome of these two secondary crops, with an excellent outturn from the main winter-spring crop harvested in July, the aggregate 2002 paddy production is tentatively forecast at 33.6 million tonnes (22.4 million tonnes of milled rice), which is a record. Meanwhile, planting of the 2003 winter-spring paddy crop is about to commence.

The latest estimate of the 2002 maize crop is 2.3 million tonnes, 6 percent above the previous year. This increase reflects favourable growing conditions and a larger area planted. The country does not produce wheat.

During the first months of 2002, rice exports were sharply down compared to the previous year. As a result, the forecast tonnage for export in 2002 has been adjusted downwards and now stands at 3.2 million tonnes, the lowest for the past 6 years.

YEMEN (6 November)

Harvesting of the 2002 cereal crop is almost complete. Total production is now forecast at about 680 000 tonnes, slightly below the level of the previous year.

Breeding conditions for locusts are reported to be favourable in the Red Sea coastal plains of Yemen. Ground control operations treated 200 hectare of hopper and adult groups in October near the coastal plains near Aden.

Imports of cereals in 2002 - mainly wheat - are estimated at about 2.4 million tonnes, same level as last year.

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

COSTA RICA (10 November)

Harvesting of the 2002/03 second season maize and paddy crops is about to start under normal weather conditions. Early production forecasts point to low maize outputs from both crops, largely reflecting reduced plantings with respect to the previous year. Paddy output in 2002 should be a below-average 258 000 tonnes. Harvest operations of the 2002 second season bean crop is about to start and a low output of some 14 000 tonnes is also anticipated.

Wheat imports in marketing year 2002/03 (July/June) are forecast at 200 000 tonnes, similar to the previous year's, while maize imports, mostly yellow, are expected to increase slightly from the 560 000 tonnes imported in 2001/02 (July/June). Some 75 000 to 80 000 tonnes of rice imports are tentatively forecast in 2003 marketing year (January/December).

Coffee exports, the main agricultural foreign exchange earner, fell in the 2001/02 harvest by 7.3 per cent with respect to the previous year, mainly as a result of the oversupply of this commodity in the international markets that have pushed coffee prices to extremely low levels with dire economic consequences in the coffee producing countries of the sub-region.

CUBA (19 November)

The country has been affected by hurricanes "Isidore" and "Lili" at the end of September and early October respectively. Most of the western parts of the country and the Isle of Youth, off the southern coast, were hit by the strong winds and heavy rains and flooding caused by the hurricanes. Considerable damage has been inflicted to housing and infrastructure. Serious damage was particularly incurred to important foreign exchange earning crops such as tobacco and citrus, the latter crop having been seriously affected by hurricane "Michelle" in November 2001. Emergency food assistance from the international community for the duration of 30 days is being provided to some 50 000 people affected by the hurricane. The abundant rains helped offset, however, low moisture levels and contributed refill water reservoirs in other parts of the country. Despite the adverse impact of the hurricanes, the state of the cereal crops, mostly paddy and maize, is reported as generally satisfactory. Harvesting of the 2002/03 first season paddy and maize crops has resumed, following the disruption caused by the hurricanes, and average outputs in 2002 of 281 000 tonnes and 146 000 tonnes respectively are tentatively forecast. Production of paddy is not sufficient to meet domestic demand and rice imports between 470 000 tonnes and 480 000 tonnes should be required in marketing year 2003 (January/December). Maize imports in 2002/03 (July/June) are expected to be about 250 000 tonnes, close to the previous year's imported volume.

DOMINICAN REPUBLIC (19 November)

Normal to abundant rains since September benefited planting of the 2002/03 rainfed second season maize and sorghum crops, currently underway, as well as sowing of the 2002 second season paddy crop which has been recently completed. Extensive areas of grazing land, particularly in the east and north of the country, were also favoured by the rains. Prospects are good and an above-average maize output is anticipated. The outlook is equally good for the paddy crop and a bumper crop is forecast. Good outturns are expected from other minor foodcrops, such as roots, beans and bananas.

Wheat imports in 2002/03 marketing year (July/June) are likely to remain closely to those imports from the precedent marketing year. Imports of maize are expected to remain close to the volume of 700 000 tonnes imported in marketing year 2001/02 (July/June) despite the increase in price too for

this commodity thus reflecting the steady demand of the animal feeding industry. No rice imports are forecast in 2003 (January/December) as production in 2002 and carry-over stocks forecast for end of this year are considered sufficient to meet domestic demand of this important staple.

EL SALVADOR (30 October)

Normal to above-normal precipitation has been reported in September, as well as storm rains and winds across the coastal and western areas caused by hurricane "Isidore" at the end of the month. Satisfactory growing conditions are reported for the 2002/03 second season maize, sorghum and bean crops. Maize output for the year is officially forecast at some 610 000 tonnes which compares to the past 5-year average of 573 000 tonnes. Sorghum production is expected to increase from 140 000 tonnes in 2001/02 to 147 000 tonnes, but would still be below the 5-year average of 168 000 tonnes. An above-average production of beans of 84 000 tonnes is anticipated. Despite the favourable anticipated outputs for the country as a whole, food assistance from the international community is still being distributed in some rural communities particularly in the north-east, where the first season cereal and bean crops from last year and this year were damaged by drought. Food assistance is also being provided in the coffee producing areas in the west, where thousands of workers have been unemployed for a long time due to the international coffee crisis due to falling prices. Severe cases of malnutrition, particularly among children, are reported in the western departments of Sonsonate and Ahuachapán. The possibility of food assistance in other coffee producing areas is also being studied.

GUATEMALA (30 October)

Landslides and flooding in various parts of the country caused by the passage of hurricane "Isidore" at the end of September caused damage to rural housing and infrastructure. No major losses in agriculture have been reported. Normal to above-normal rains typical of the ongoing hurricane season have also been registered during October, with some damage particularly to coastal villages. Harvesting of the 2002 second season maize crop, mainly white, has started. Early forecasts point out to an average output of about 1.1 million tonnes. Harvesting of the sorghum and second season bean crops has also started and average outputs of 47 000 tonnes and about 90 000 tonnes are anticipated respectively. Food emergency assistance from the international community continues to be provided to rural families affected by last year's drought and by the irregular rainfall pattern which this summer affected the first season crops in some localized areas in the east, such as El Progreso, Zacapa and Chiquimula. Food assistance is also being delivered to thousands of unemployed people from coffee plantations which have been forced to close due to the international coffee price crisis which has stricken the sector for three years. Cases of severe malnutrition in certain groups, including children, is reported.

HAITI (30 October)

Seasonal normal to abundant rains since August are favouring planting of the 2002/03 second season rainfed coarse grain and bean crops. The rains have been regular and well distributed in the north-west, which had been particularly affected by dry weather through most of the year. The dry weather had also affected crops in various areas of the Département du Sud and the Département de la Grand' Anse. The crops were subsequently affected by hurricane rains and flooding thus incurring additional damage to crops. Abnormally high food prices are recently reported. Food assistance is being provided to some 100 000 people in the area until harvest of the second season crops and other minor food crops start in January 2003. Maize output for the country as a whole in 2002 is tentatively forecast at a below-average level of about 180 000 tonnes, while some 100 000 tonnes of sorghum are anticipated. Harvesting of the second season irrigated paddy crop has started. Production of paddy for the whole year is provisionally forecast at about 103 000 tonnes. The output of beans in 2002 is expected to be some 30 000 tonnes. Food assistance

from the international community is being provided through development projects to some sectors of the population, mainly in the north and northwest.

HONDURAS (30 October)

Seasonal heavy rains since September and consequent flooding in various areas, particularly in the north-east, have caused damage to crops, as well as to housing and infrastructure. Power failures in the main cities of the country are also reported as a consequence of the excessive rains which are typical of the hurricane season. Harvesting of the 2002/03 second season maize and bean crops has started, as well as that of the sorghum crop. Maize output in 2002 is tentatively forecast a slightly below-average 500 000 tonnes, partly reflecting losses caused by drought to the first season crops. Increases in the domestic price of staple items such as bread, sugar and bananas are reported. Food assistance from the international community is being distributed to the affected rural population in the departments of Choluteca, El Paraiso, La Paz and Francisco de Morazán. Cases of malnutrition, especially among children, have been registered. An increasing number of malnourished children are receiving assistance in nutritional care centers. Food assistance is also being distributed to thousands of workers who have lost their jobs following the closure of coffee plantations in various localities of the departments of Ocotepeque, Lempira, El Paraiso and Olancho. Some 6 000 families are reported to have been severely affected by the crisis.

JAMAICA (30 October)

The country was hit by hurricane "Isidore" by end-September and less than ten days later by hurricane "Lili". A number of victims is reported. The heavy rains and resulting flooding and mudslides affected all of the country parishes, incurring considerable damage to housing and infrastructure, as well as to crops. The important foreign exchange earner sugar cane crop has been particularly affected. The crop and the sugar industry in general had suffered badly from heavy rains in late May and early June, with some mills unable to run for several days. A considerable reduction in their export quota is anticipated. Considerable damage to banana plantations is also reported.

MEXICO (30 October)

The Pacific coastal states of Nulisco, Sinaloa, Colima and particularly Nayarit were hit by hurricane "Kenna" by end-October, incurring into damage to sugarcane and maize crops; the hurricane rains, however, helped restore soil moisture and contributed maintain water reservoirs at adequate levels for planting in the irrigated areas of the northwest, where sowing of the 2002/03 wheat crop has started. Mostly dry weather has prevailed in the rest of the country in the past weeks, favouring the start of the harvesting operations of the important maize summer crop (planted in the spring/summer of 2002). Harvesting of the maize crop planted in the fall/winter of 2001/02 has been completed and an average 4 million tonnes collected, despite some damage to crops in the states of Yucatán and Campeche caused by the passage of hurricane "Isidore" in September. Latest maize production forecast for 2002 (planted fall/winter 2001/02 and spring/summer 2002) indicate an above-average outturn of 18.8 million tonnes. Harvesting of the sorghum crop is still underway, mainly in the state of Tamaulipas which accounts for the bulk of sorghum summer crop. An above-average output is also anticipated.

NICARAGUA (30 October)

Heavy rains, typical of the hurricane season, and consequent flooding and landslides since mid-September have caused considerable damage to urban and rural housing and infrastructure all over the country, and particularly around the capital, Managua. Some minor damage to crops is reported. Harvesting of the 2002/03 second season maize, bean and sorghum crop is underway. Despite the damage, an above-average maize output is early forecast. Production of sorghum should be slightly above-average, while the output of beans is also expected to be above-average. The number of small rural families affected by the

closure of coffee plantations, particularly in the northern coffee growing areas, continues to increase. Thousands of workers have remained unemployed for the last three years. Food assistance from the international community is being distributed to the affected families. Extreme food insecurity is reported in various municipalities.

PANAMA (30 October)

Heavy rains and flooding since mid-September are reported in various parts of the country, including the areas around the capital, with consequent damage to urban and rural housing and infrastructure. Planting of the second season paddy crop for this year has been completed. Harvesting is due from late November and a slightly below-average production is tentatively forecast, despite the considerable losses incurred by dry weather at planting in the important producing province of Chiriquí. The country is virtually self-sufficient in rice consumption, but some imports would be probably required in 2003 (January/December) to offset the losses incurred.

SOUTH AMERICA

ARGENTINA (31 October)

Harvesting of the 2002 wheat crop has started. Growing conditions were generally favourable despite some excess humidity in parts of the main producing Province of Buenos Aires, which accounts for nearly half of the domestic wheat production, and some parts of Cordoba and Santa Fe. Total plantings were officially estimated at 6.15 million hectares, which compares to 6.8 million hectares in 2001. The reduced plantings coupled with reduced use of fertilizers, mainly due to financial constraint to farmers, should result in a smaller wheat output relative to 15.3 million tonnes harvested in 2001. Planting of the 2002/03 maize crop has resumed following disruption in mid-October by heavy rains across most of the producing areas. Intended plantings are officially forecast at about 3 million hectares, some 4 per cent down on the total area planted last year, despite more attractive prices to producers in recent months. This largely reflects, as in the case of wheat, credit constraints to farmers and higher input costs. The economic crisis continues to jeopardize the food security of many households. Cases of malnutrition among children have recently been reported in various provinces.

BOLIVIA (31 October)

Harvesting of the wheat winter crop (planted in April-May) in the main producing Department of Santa Cruz has been completed and aggregate wheat output in 2002 is provisionally estimated at an above-average 143 000 tonnes. Land is being prepared in the highlands and valleys for planting of the 2002/03 main cereal crops, as well as the important potato and other minor food crops.

Wheat imports in marketing year 2002/03 (July/June) are forecast at about 250 000 tonnes, close to the volume imported in the previous year.

BRAZIL (31 October)

Sharp frosts in early October, coupled with excessive rains later in the month, have negatively affected the 2002 wheat crop in the main producing states of Paraná and Rio Grande do Sul. Production in these states account for more than 90 per cent of domestic wheat production. Harvesting is underway and output is officially forecast at 3.1 million tonnes, which is well above-average but below earlier estimates. The increase in production is principally due to the government's recent incentive programme for farmers in anticipation of higher import prices for this important staple. To meet domestic demand, some 7 million tonnes of wheat are on the average imported every year. In marketing year 2002/03 (September/August) some 6.5 million tonnes are expected to be imported. Planting of the 2002/03 main maize crop (summer crop) has started in some parts and should extend until February. Planting intentions are uncertain as farmers feel at

present attracted to more exportable crops. It is reported that farmers are inclined to decrease the area planted to maize in the current summer crop and, to offset the decline, would most likely increase plantings during the "safrihna" or second season crop which is planted in March-July mainly in the large producing central and southern states of the country. (Another "zafrinha" takes place in the north-east and is planted with the start of the rainy season in November). A recent official survey indicated that intended plantings for the 2002/03 first season maize crop would be about 9.2 million hectares compared to an actual 9.4 million hectares the year before. The anticipated reduction is principally forecast for the large producing states in the south. Planting of the 2002/03 paddy crop has started and a slight increase in the area planted is tentatively forecast principally due to attractive prices in the main producing states.

Some areas in the northeast are being affected by dry weather with adverse consequences to crops. A state of emergency in some localities has been declared by the Government.

CHILE (31 October)

Heavy rains in mid-October resulting in flooding and mudslides in the southern parts of Chile incurred considerable damage to housing and infrastructure, as well as to pastures and livestock. Harvesting of the 2003 wheat crop is due to start from December. Total plantings are officially estimated at 413 000 hectares which compares to the previous year's 426 000. Lower than normal yields are anticipated as a consequence of delayed planting due to excess humidity. Production is early forecast at about 1.7 million tonnes, some 6 per cent below the previous year's output but still slightly above average. Planting of the 2003 maize crop is well advanced and the total area planted is expected to increase by some 8 per cent with respect to the year before in anticipation of attractive prices. The area planted to oats is also expected to increase from the good level of last year.

COLOMBIA (31 October)

Normal to abundant rains are reported across the country, favouring planting and growing conditions of the second season rainfed crops to be harvested from January. Average coarse grain outputs are anticipated and aggregate production for the year is early forecast at 1.2 million tonnes of maize and 250 000 tonnes of sorghum.

Wheat imports in 2002/03 marketing year (July/June) are expected to decline from 1.2 million tonnes in the previous year to 1.1 million tonnes mainly as a result of higher international prices, while maize imports in marketing year 2003 (January/December) are forecast to remain at about 2.1 million tonnes due to the strong demand of the animal feed sector.

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

ECUADOR (31 October)

New volcano eruptions in early October have affected pastures and livestock, as well as field crops in the central province of Bolivar. Some impact on the population's health is reported. An alert has been declared by local authorities in the affected areas. It is reported that some 4 300 families and about 3 500 hectares of farmland have been affected. Another volcano eruption is reported in the vicinity of the capital in early November. A large number of people and livestock heads have been evacuated, and damage to field crops and pastures is reported in some districts. Emergency relief assistance, including food aid, is being provided by the international community to the affected people. Harvesting of the 2002 second season maize crop has only started. Aggregate maize output for the year (both crops) is tentatively forecast at an above-average 566 000 tonnes, largely reflecting a bumper first season crop. Harvesting of the 2002 second season paddy crop has also started and early forecasts point out to an above-average paddy output for the whole year of some 1.3 million tonnes.

Banana export prices continue to decline thus affecting the food situation of many farmers and workers who have lost their jobs as a result of the crisis.

PARAGUAY (31 October)

A prolonged drought has affected the western departments of Alto Paraguay, Boquerón and Canindeyú where no rain has been registered in the past 8 months thus delaying planting of new crops. The food security of about 5 000 rural families who live principally on subsistence farming on small plots is jeopardized. It is reported that affected communities have nearly depleted their food reserves and that water supply systems are dry or have been contaminated. An increasing number of people, including children, are being affected by infectious diseases. Severe cases of malnutrition are also reported. A national state of emergency has been declared by the Government and emergency relief assistance, including food aid, from the international community is being provided to the most affected families.

PERU (31 October)

The bulk of the wheat harvesting operations of the 2002 crop has been completed and output for the year is provisionally estimated at about 190 000 tonnes which compares to the past 5-year average of 163 000 tonnes. Harvesting of the 2002 white maize crop is virtually complete while that of the yellow maize crop is still underway. Large volumes of yellow maize are expected to be harvested in the next two months. Aggregate maize output (white and yellow) in 2002 is tentatively forecast at a well above-average 1.5 million tonnes. Harvesting of the important paddy crop is still to be completed in the main producing departments of the north. The outlook is good, and an average paddy crop of 1.7 million tonnes is expected.

Wheat imports in 2002/03 marketing year (July/June) are forecast to be close to the previous year's relatively high 1.3 million tonnes, reflecting the steady demand for this commodity, enhanced by population growth. Maize imports are expected to be about 1 million tonnes close to the volume imported in marketing year 2001/02.

URUGUAY (31 October)

Harvesting of the 2002 wheat and barley crops is about to start and early production forecasts point out to significant increases from last year when the crops were affected by disease caused by excessive rains. Planting of the 2003 maize crop continues while that of the important 2003 paddy crop has started. The area planted to paddy is officially estimated at a minimum 120 000 hectares. It is reported that this figure is likely to increase.

VENEZUELA (31 October)

Harvesting of the 2002 coarse grain and paddy crops is well advanced. Maize output for the year is tentatively forecast at an average 1.2 million tonnes. Production of sorghum, by contrast, should be a below-average 340 000 tonnes. Paddy output is expected to be about 640 000 tonnes which compares to the past 5-year average of 724 000 tonnes.

EUROPE

EC (6 November)

FAO's latest forecast puts aggregate 2002 cereal production in the EU at about 212 million tonnes, 5 percent up from last year and slightly above the average of the past five years. However, the increase results solely from a larger wheat output as production of all other grains remained virtually unchanged or fell slightly compared to the previous year. The wheat crop is estimated at about 104 million tonnes, up from 92 million tonnes in 2001. Production increased sharply in France and the United Kingdom this year, and also recovered somewhat in Italy after a drought-reduced crop in 2001. The estimate of aggregate coarse grain production remains at some 105 million tonnes, about 2 percent down from last year. While barley output remained close to last year's level, production of the other small coarse grains (mostly rye and oats) fell. Output of maize also fell, to about 39 million tonnes, 2 percent down on 2001.

Autumn weather conditions have been generally satisfactory for winter crop sowing throughout the Community. Although rainfall across northern Europe in late October hampered winter grain planting, the moisture was beneficial for germinating crops.

ALBANIA (5 November)

After a particularly dry winter grain season in 2001/02, early prospects for the new 2002/03 season look more favourable. Substantial summer and autumn rainfall has improved soil moisture reserves, which will benefit the emergence and early development of the winter grains. Wheat output in 2002 is estimated at 300 000 tonnes while the average of the past five years stands at about 350 000 tonnes.

BELARUS (4 November)

Cereal harvest is nearly complete and latest reports indicate a sharply recovered harvest of about 5.7 million tonnes in 2002/03 marketing year, compared with 4.9 million tonnes the previous year. This year's harvest includes 2.1 million tonnes of barley, 1.7 million tonnes of rye and 970 000 tonnes of wheat. Cereal imports in 2002/03 marketing year is estimated at 651 000 tonnes, including 405 000 tonnes of wheat, 135 000 tonnes of maize and 71 000 tonnes of rye.

BOSNIA-HERZEGOVINA (5 November)

Spring cereal harvest is nearly complete and output is estimated at about 1.1 million tonnes in 2002/03 marketing year, which is some 71 000 tonnes higher than the sharply recovered harvest of the preceding year. The cereal harvest this year includes some 640 000 tonnes of maize, 340 000 tonnes of wheat and 55 000 tonnes of barley. Cereal import requirement for 2002/03 marketing year is estimated at 230 000 tonnes, which is some 60 000 tonnes lower than the preceding year.

BULGARIA (4 November)

The 2002 cereal output is estimated at about 5.4 million tonnes, just above last year's level. Of the total, wheat is estimated to account for 3.5 million tonnes. The final outcome was somewhat less than earlier indications had promised due to heavy rains during the latter part of the season, which affected not only the yield but also the quality of the crop. The proportion of the grain suitable for milling is reported to be significantly less than normal. This year's barley crop fared somewhat better, increasing to about 1 million tonnes (2001: 750 000), following increased plantings and better yields than in the past few years. The barley crop was harvested before the arrival of the wet

weather in August. Early estimates of the summer maize production also point to an increase from the previous year, to about 950 000 tonnes, despite a smaller area. Maize crops generally benefited from the summer rainfall.

CROATIA (5 November)

Cereal harvest in 2002/03 marketing year is seen at more than 3 million tonnes, which is some 120 000 tonnes lower than the harvest of the previous year. Wheat harvest this year is estimated at 850 000 tonnes compared with 965 000 tonnes in 2001, while coarse grain at about 2.2 million tonnes in 2002/03 marketing year is similar to last year. Cereal exports during the ensuing marketing year is estimated at about 400 000 tonnes, including 150 000 tonnes of maize and 250 000 tonnes of wheat.

CZECH REPUBLIC (5 November)

The final official harvest estimate based on mid-September information confirms a drop in this year's cereal production largely because of reduced planting and heavy rains during the summer, which caused serious damage to some cereal crops before they could be gathered. The official estimate puts aggregate cereal production at some 6.7 million tonnes about 9 percent down from the previous year. Of the total, wheat would account for about 4 million tonnes, compared to almost 4.5 million tonnes last year. Prospects for the winter grain planting campaign are uncertain as many farmers are expected to be short of funds following the devastating summer floods.

ESTONIA (5 November)

Cereal harvest this year is estimated at 566 000 tonnes, which is similar to the harvest in 2001. Cereal harvest this year includes some 131 000 tonnes of wheat, 284 000 tonnes of barley and 85 000 tonnes of oats. Cereal import requirement is estimated at 243 000 tonnes including 104 000 tonnes of wheat, 60 000 tonnes of maize and 45 000 tonnes of barley.

FORMER YUGOSLAV REPUBLIC OF MACEDONIA (6 November)

Latest information points to an increase in wheat output this year after last year's severely drought reduced yields. Precipitation is reported to have been much closer to normal for the winter grain season and somewhat above normal for the spring/summer crops. Tentative estimates put wheat production at about 250 000 tonnes compared to the recent average of about 300 000 tonnes. Early prospects for the next 2002/2003 winter grain season are generally favourable with substantial rainfall during part of the summer ensuring soil moisture levels are adequate, and probably better than last year, for planting and emergence of the winter grains.

HUNGARY (5 November)

Cereal output fell sharply this year reflecting reduced plantings and a long summer drought. Final official estimates put the aggregate small grains crop at about 5.6 million tonnes, some 20 percent down from the previous year's good crop. Of the total wheat is estimated to account for 3.9 million tonnes, down from over 5 million tonnes last year. The likely outcome of the maize crop has been particularly difficult to assess this year because of a large disparity in yields from region to region depending on the impact of drought. However, based on the latest information from early October, when some 30 percent of the crop was estimated to have been harvested, it seems unlikely that the crop could exceed the lower end of the 6 to 6.3 million tonnes range forecast by the Ministry of Agriculture earlier in the summer. Last year a bumper crop of 7.8 million tonnes was gathered. Widespread rains in October, although interfering with the ongoing maize harvest, have been generally beneficial in replenishing soil moisture for winter grain planting after the past exceptionally dry season, particularly in southwestern parts.

LATVIA (5 November)

Latvia is set to harvest some 917 000 tonnes of cereals in 2002/03 marketing year, which is some 7 000 tonnes lower than the preceding year. Area under cereals this year declined by 48 000 hectares compared with 2001/02 marketing year when area planted to cereals was 417 000 hectares. Area grown to cereals is seen to remain similar to the preceding year.

LITHUANIA (5 November)

Cereal harvest this year is seen to amount to 2.4 million tonnes, which is similar to the harvest in 2001. Cereal harvest this year includes some 800 000 tonnes of wheat, 1 million tonnes of barley and 450 000 tonnes of rye. Cereal exports are estimated at some 168 000 tonnes and imports at 105 000 tonnes. Area under cereals is planned to remain the same in the ensuing year.

MOLDOVA (5 November)

Latest reports indicate that cereal harvest will total some 2.6 million tonnes in 2002 which is about 100 000 tonnes below the harvest last year but nearly 700 000 tonnes higher than the average harvest of the previous six years. This year's harvest includes about 1.2 million tonnes of wheat, 1.2 million tonnes of maize and 230 000 tonnes of barley. Cereal exports in 2002/03 marketing year is estimated at 303 000 tonnes including 130 000 tonnes of wheat, 90 000 tonnes of barley and 83 000 tonnes of maize. Moldova exported some 345 000 tonnes of cereals in 2001/02.

POLAND (5 November)

Latest official estimates put the aggregate 2002 cereal harvest at about 26.9 million tonnes, down from about 27 million tonnes last year. While the wheat crop remained virtually unchanged this year at about 9.3 million tonnes, output of rye, the second most important crop, fell sharply to 4 million tonnes, from 5 million tonnes in the previous year. Output of barley and triticale increased and although the final outcome of the summer maize crop is still uncertain an increase is also expected. Although some widespread rainfall in October has greatly improved the soil moisture content for the winter grains the north west of the country still remains very dry.

ROMANIA (5 November)

Wheat production fell sharply in 2002, to just 4.4 million tonnes, 44 percent down from last year's good harvest, and well below the average of the past five years. The winter and spring wheat crops were generally planted late under drought conditions, and exceptionally dry weather continued through the spring, further stressing young plants. Moreover, the arrival of substantial rainfall later in the season, while too late to improve yields, adversely affected the near-mature crops and hampered harvesting, causing overall crop quality to be reduced. Harvesting of the summer maize crop was completed by the end of October and latest information puts output at a reasonably good level of 8 million tonnes, up 500 000 tonnes from last year. Maize crops benefited from the good summer rainfall.

RUSSIAN FEDERATION (4 November)

Grain harvest is nearly complete and latest report indicate that the harvest this year estimated at more than 85 million tonnes is similar to the bumper harvest in 2001. Grain harvest this year includes some 47.5 million tonnes of wheat, 19.3 million tonnes of barley and about 1.7 million tonnes of maize. Cereal exports in 2002/03 marketing year are estimated at about 8.5 million tonnes compared with 6.9 million tonnes the previous year. Cereal imports in 2002/03 marketing year are estimated at 1.6 million tonnes, which is similar to last year. Winter grain sowing campaign has begun and similar areas to last year are expected to be sown.

Civil strife and military action in Chechnya continue to disrupt agricultural activities. WFP plans to distribute some 34 011 tonnes of basic food commodities to some 290 500 internally displaced and vulnerable population in Chechnya and Ingushetia over a one-year period starting from January 2003.

SLOVAK REPUBLIC (5 November)

The aggregate 2002 cereal crop is estimated at about 3.3 million tonnes, similar to the previous year's level and about average. While wheat production fell to about 1.6 million tonnes (2001: 1.85 million tonnes), because of reduced planting and lower yields, the barley crop turned out larger at over 700 000 tonnes, compared to about 670 000 tonnes last year. As of early November, planting of the winter grain crops was well advanced with some 50 percent of the expected area already reported to have been planted.

SLOVENIA (5 November)

The 2002 wheat production is about average at 160 000 tonnes, slightly less than last year's output, but the quality is reported to be better.

UKRAINE (4 November)

Cereal harvest in 2002 is estimated at about 37 million tonnes, which is similar to the harvest last year. Cereal harvest in 2002 includes 21 million tonnes of wheat, 9.8 million tonnes of barley and almost 3 million tonnes of maize. Cereal exports in 2002/03 marketing year is estimated at 9.6 million tonnes, which is compared with 9 million tonnes of exports in the preceding year. This total includes 6.4 million tonnes of wheat and 2.6 million tonnes of barley.

YUGOSLAVIA, FED. REP. OF (SERBIA AND MONTENEGRO) (5 November)

Cereal harvest this year is estimated at 8.14 million tonnes, which is some 301 000 tonnes lower than the sharply recovered harvest in 2001. Cereal harvest in 2002 consists of 2.1 million tonnes of wheat and 6 million tonnes of coarse grains, which compares with 2.5 million tonnes of wheat and 5.9 million tonnes of coarse grains in the preceding year. Cereal exports are estimated at 502 000 tonnes, including 450 000 tonnes of maize and 250 000 tonnes of wheat.

Under a Protracted Relief and Recovery Operation since July this year, WFP has been assisting on average some 134 000 refugees, 130 000 of whom are in Serbia and 4 000 in Montenegro. This operation will continue until the end of December 2003. ICRC will continue to assist the Internally Displaced Persons (IDP) until the end of March 2003.

**NORTH
AMERICA**

CANADA (4 November)

Cereal output in 2002 is set to fall sharply following one of the worst droughts on record across the central and northern regions of Saskatchewan and Alberta. According the latest official report in late October, aggregate cereal production is forecast at just over 35 million tonnes, 19 percent down from the previous year. Wheat output is forecast at 15.5 million tonnes (2001: 20.6 million tonnes), and production of coarse grains is put at 19.8 million tonnes (2001: 22.7 million tonnes). Outputs of all coarse grains other than maize fell. By contrast to the other crops, maize is predominantly grown in eastern Canada where weather conditions are reported to have been better than last year and maize yields increased slightly as a result.

UNITED STATES (14 November)

The November USDA crop report put the 2002 aggregate wheat (winter and spring) output at 44 million tonnes, 17 percent down from the already reduced crop in 2001 and about 30 percent below the average of the past five years. The sharp reduction came as a result of a reduction in plantings (to the smallest area since 1970) and poor yields because of drought. As of 10 November, planting of the winter wheat crop for harvest in 2003 was reported to be 92 percent complete, about normal

for the time of season. The percent of the crop already emerged (85 percent) on the same date, was also similar to last year's level, while the condition of emerging crops is on the whole considerably better than at the same time last year. Early indications for the total winter wheat area this year point to a significant increase compared to 2001 after a downward slide in the past few years.

As the coarse grains harvest draws to a close in the main producing states, latest estimates point to a larger output this year than previously expected. The USDA's November forecast put aggregate coarse grain production at about 246 million tonnes, up from expectations earlier in the autumn, but still about 17 million tonnes down from last year's crop. Of the total, maize is now expected to account for about 229 million tonnes, compared to 241 million tonnes in 2001. By 10 November, it was reported that, 86 percent of the maize crop had been harvested, slightly behind last year's pace and the average for the time of year.

OCEANIA

AUSTRALIA (4 November)

Australia is set to harvest a sharply reduced winter grain crop in the coming weeks reflecting well-below normal rainfall across most of the grain belt during the 2002 winter grain season. In a special report issued in late October, ABARE forecast the 2002 wheat crop at 10.1 million tonnes, more than 3 million tonnes down from the forecast a month earlier and about 58 percent below the previous year's near record crop. The forecast for barley output has also been reduced further since the previous report, to about 3.4 million tonnes, which would be 55 percent down from 2001. Although some rainfall arrived in early October, this was generally reported to be too patchy and light to be of any significant benefit to the crops which were already nearing maturity ahead of normal because of the dry season. As of late October the harvest had already started in some parts and it is now considered to be generally too late for any further rainfall to significantly improve crop yields. With soil moisture reserves now well depleted, the prospects for the summer crops, normally sown between November and January in northern New South Wales and southern Queensland will depend heavily on the arrival of some good planting rainfall and subsequent timely showers throughout the growing season.

PAPUA NEW GUINEA (22 November)

Parts of the country are experiencing a severe drought. Water shortages are reported in many urban centers, including lack of drinking water. In West New Britain province, villagers have been forced out of their homes due to volcano activity. Emergency relief, including food assistance, is being distributed to the affected population.

ESTIMATED CEREAL IMPORT REQUIREMENTS OF LOW-INCOME FOOD-DEFICIT COUNTRIES 1/
a) 2001/02 or 2002 estimates (in thousand tonnes)

COUNTRY	Marketing year	2000/01 or 2001			2001/02 or 2002			
		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		30 677.8	3 001.7	33 679.5	31 529.2	29 465.2	1 718.2	27 747.0
Northern Africa		15 240.1	298.3	15 538.4	16 886.0	16 886.0	43.0	16 843.0
Egypt	July/June	10 640.9	20.7	10 661.6	12 273.0	12 273.0	34.5	12 238.5
Morocco	July/June	4 599.2	277.6	4 876.8	4 613.0	4 613.0	8.5	4 604.5
Eastern Africa		4 021.9	1 840.7	5 862.6	4 292.0	3 771.2	832.6	2 938.6
Burundi	Jan./Dec.	66.2	43.8	110.0	61.0	6.6	6.6	0.0
Comoros	Jan./Dec.	46.0	0.0	46.0	46.0	21.9	0.0	21.9
Djibouti	Jan./Dec.	58.8	9.2	68.0	85.0	85.2	18.1	67.1
Eritrea	Jan./Dec.	92.4	285.0	377.4	170.0	102.9	102.9	0.0
Ethiopia	Jan./Dec.	37.7	845.3	883.0	370.0	237.2	226.5	10.7
Kenya	Oct./Sept.	1 512.3	348.1	1 860.4	1 180.0	1 180.0	135.1	1 044.9
Rwanda	Jan./Dec.	144.2	30.8	175.0	170.0	33.6	28.0	5.6
Somalia	Aug./July	206.7	34.3	241.0	270.0	270.0	18.3	251.7
Sudan	Nov./Oct.	1 287.6	158.1	1 445.7	1 270.0	1 270.0	101.7	1 168.3
Tanzania	June/May	476.3	33.0	509.3	484.0	484.4	116.3	368.1
Uganda	Jan./Dec.	93.7	53.1	146.8	186.0	79.4	79.1	0.3
Southern Africa		1 437.2	418.2	1 855.4	2 245.0	2 245.1	361.0	1 884.1
Angola	April/March	344.9	202.9	547.8	489.0	489.1	169.7	319.4
Lesotho	April/March	224.9	3.1	228.0	181.0	181.0	2.8	178.2
Madagascar	April/March	368.9	26.3	395.2	393.0	393.0	28.6	364.4
Malawi	April/March	12.2	27.2	39.4	150.0	150.0	6.6	143.4
Mozambique	April/March	326.3	155.5	481.8	684.0	684.0	133.7	550.3
Swaziland	May/April	87.0	0.0	87.0	78.0	78.0	1.2	76.8
Zambia	May/April	73.0	3.2	76.2	270.0	270.0	18.4	251.6
Western Africa		9 140.7	366.8	9 507.5	7 368.2	6 233.4	393.5	5 839.9
Coastal Countries		6 641.8	175.7	6 817.5	5 236.2	3 656.9	233.7	3 423.2
Benin	Jan./Dec.	107.7	14.2	121.9	114.0	58.7	17.0	41.7
Cote d'Ivoire	Jan./Dec.	1 429.5	5.7	1 435.2	1 025.0	731.1	14.8	716.3
Ghana	Jan./Dec.	451.3	53.7	505.0	461.2	317.5	52.6	264.9
Guinea	Jan./Dec.	393.8	33.2	427.0	331.0	53.7	41.2	12.5
Liberia	Jan./Dec.	187.7	16.4	204.1	210.0	37.1	27.9	9.2
Nigeria	Jan./Dec.	3 756.9	0.0	3 756.9	2 770.0	2 334.8	12.5	2 322.3
Sierra Leone	Jan./Dec.	230.0	46.5	276.5	225.0	78.3	67.7	10.6
Togo	Jan./Dec.	84.9	6.0	90.9	100.0	45.7	0.0	45.7
Sahelian Countries		2 498.9	191.1	2 690.0	2 132.0	2 576.5	159.8	2 416.7
Burkina faso	Nov./Oct.	216.8	19.4	236.2	171.0	249.1	21.9	227.2
Cape Verde	Nov./Oct.	41.5	49.7	91.2	93.0	74.0	36.6	37.4
Chad	Nov./Oct.	69.2	33.7	102.9	71.0	87.4	3.3	84.1
Gambia	Nov./Oct.	163.1	1.2	164.3	124.0	148.3	5.1	143.2
Guinea Bissau	Nov./Oct.	51.4	4.6	56.0	70.0	50.7	6.3	44.4
Mali	Nov./Oct.	108.2	6.0	114.2	90.0	244.5	7.3	237.2
Mauritania	Nov./Oct.	279.6	32.7	312.3	318.0	278.5	34.3	244.2
Niger	Nov./Oct.	622.9	21.5	644.4	345.0	384.8	28.3	356.5
Senegal	Nov./Oct.	946.2	22.3	968.5	850.0	1 059.2	16.7	1 042.5
Central Africa		837.9	77.7	915.6	738.0	329.5	88.1	241.4
Cameroon	Jan./Dec.	381.1	6.1	387.2	300.0	120.5	2.2	118.3
Cent.Afr.Rep.	Jan./Dec.	49.9	0.6	50.5	36.0	11.3	5.0	6.3
Congo, Dem.Rep.	Jan./Dec.	221.4	28.6	250.0	250.0	92.7	64.6	28.1
Congo, Rep.	Jan./Dec.	162.6	36.3	198.9	125.0	99.6	11.1	88.5
Eq. Guinea	Jan./Dec.	16.5	1.5	18.0	15.0	0.2	0.0	0.2
Sao Tome	Jan./Dec.	6.4	4.6	11.0	12.0	5.2	5.2	0.0

ESTIMATED CEREAL IMPORT REQUIREMENTS OF LOW-INCOME FOOD-DEFICIT COUNTRIES 1/
a) 2001/02 or 2002 estimates (in thousand tonnes)

COUNTRY	Marketing year	2000/01 or 2001			2001/02 or 2002			
		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		31 847.7	3 948.3	35 796.0	36 757.0	34 393.0	3 347.1	31 045.9
Afghanistan	July/June	965.8	246.3	1 212.1	2 178.0	1 506.9	323.8	1 183.1
Armenia	July/June	366.0	99.0	465.0	345.0	345.0	37.0	308.0
Azerbaijan	July/June	774.0	22.0	796.0	738.0	738.0	17.0	721.0
Bangladesh	July/June	1 227.3	511.1	1 738.4	2 016.0	2 015.7	531.6	1 484.1
Bhutan	July/June	59.0	0.0	59.0	54.0	54.0	6.2	47.8
Cambodia	Jan./Dec.	74.1	31.7	105.8	63.0	59.5	40.5	19.0
China 2/	July/June	8 729.4	70.6	8 800.0	10 000.0	10 000.0	64.2	9 935.8
Georgia	July/June	544.0	120.0	664.0	518.0	543.0	93.0	450.0
India	April/March	116.4	184.5	300.9	282.0	198.9	187.4	11.5
Indonesia	April/March	7 368.5	450.7	7 819.2	6 694.0	6 694.0	225.0	6 469.0
Korea, D.P.R.	Nov./Oct.	705.8	1 428.7	2 134.5	1 884.0	1 884.4	888.0	996.4
Kyrgyz Republic	July/June	74.0	61.0	135.0	206.0	201.0	9.0	192.0
Laos	Jan./Dec.	25.0	12.0	37.0	37.0	30.0	20.5	9.5
Maldives	Jan./Dec.	29.0	8.0	37.0	37.0	1.4	0.0	1.4
Mongolia	Oct./Sept.	139.9	63.4	203.3	238.0	238.0	56.3	181.7
Nepal	July/June	69.7	9.3	79.0	75.0	75.0	8.1	66.9
Pakistan	May/April	137.8	2.2	140.0	483.0	483.0	94.4	388.6
Philippines	July/June	4 505.4	104.3	4 609.7	4 710.0	4 710.0	249.5	4 460.5
Sri Lanka	Jan./Dec.	934.3	119.7	1 054.0	1 084.0	793.0	92.0	701.0
Syria	July/June	1 814.4	31.1	1 845.5	1 456.0	1 455.9	13.3	1 442.6
Tajikistan	July/June	386.0	156.0	542.0	642.0	642.0	203.0	439.0
Turkmenistan	July/June	20.0	6.0	26.0	52.0	54.0	7.0	47.0
Uzbekistan	July/June	571.0	38.0	609.0	580.0	573.0	68.0	505.0
Yemen	Jan./Dec.	2 210.9	172.7	2 383.6	2 385.0	1 097.3	112.3	985.0
CENTRAL AMERICA		3 930.1	260.4	4 190.5	4 196.0	4 195.6	289.0	3 906.6
Cuba	July/June	1 689.6	1.9	1 691.5	1 674.0	1 673.9	6.0	1 667.9
Guatemala	July/June	989.1	64.5	1 053.6	1 153.0	1 153.4	123.4	1 030.0
Haiti	July/June	513.5	104.9	618.4	595.0	595.0	81.7	513.3
Honduras	July/June	549.7	54.3	604.0	537.0	536.6	27.3	509.3
Nicaragua	July/June	188.2	34.8	223.0	237.0	236.7	50.6	186.1
SOUTH AMERICA		827.9	143.9	971.8	1 010.0	1 010.3	142.8	867.5
Bolivia	July/June	200.7	65.4	266.1	269.0	269.3	73.4	195.9
Ecuador	July/June	627.2	78.5	705.7	741.0	741.0	69.4	671.6
OCEANIA		388.5	0.0	388.5	383.0	58.0	0.0	58.0
Kiribati	Jan./Dec.	8.0	0.0	8.0	8.0	0.0	0.0	0.0
Papua New Guinea	Jan./Dec.	325.5	0.0	325.5	320.0	57.9	0.0	57.9
Samoa	Jan./Dec.	17.0	0.0	17.0	17.0	0.1	0.0	0.1
Solomon Isl.	Jan./Dec.	26.0	0.0	26.0	26.0	0.0	0.0	0.0
Tuvalu	Jan./Dec.	1.0	0.0	1.0	1.0	0.0	0.0	0.0
Vanuatu	Jan./Dec.	11.0	0.0	11.0	11.0	0.0	0.0	0.0
EUROPE		657.4	92.6	750.0	870.0	870.0	148.2	721.8
Albania	July/June	340.1	2.9	343.0	323.0	323.0	42.7	280.3
Bosnia&Herzegovina	July/June	215.0	75.0	290.0	290.0	290.0	104.6	185.4
Macedonia, FYR	July/June	102.3	14.7	117.0	257.0	257.0	0.9	256.1
TOTAL		68 329.4	7 446.9	75 776.3	74 745.2	69 992.1	5 645.3	64 346.8

SOURCE: FAO

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

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

COUNTRY	Marketing year	2001/02			2002/03			
		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		23 976.8	935.2	24 912.0	25 670.8	5 628.7	671.6	4 957.1
Northern Africa		16 843.0	43.0	16 886.0	16 163.0	3 922.1	7.5	3 914.6
Egypt	July/June	12 238.5	34.5	12 273.0	11 700.0	3 207.2	7.5	3 199.7
Morocco	July/June	4 604.5	8.5	4 613.0	4 463.0	714.9	0.0	714.9
Eastern Africa		2 833.0	371.4	3 204.4	3 450.0	192.7	115.4	77.3
Kenya	Oct./Sept.	1 044.9	135.1	1 180.0	1 540.0	45.5	45.5	0.0
Somalia	Aug./July	251.7	18.3	270.0	320.0	14.6	14.6	0.0
Sudan	Nov./Oct.	1 168.3	101.7	1 270.0	1 320.0	38.4	38.4	0.0
Tanzania	June/May	368.1	116.3	484.4	270.0	94.2	16.9	77.3
Southern Africa		1 884.1	361.0	2 245.1	3 385.0	1 404.4	439.2	965.2
Angola	April/March	319.4	169.7	489.1	725.0	157.2	148.9	8.3
Lesotho	April/March	178.2	2.8	181.0	338.0	94.8	38.3	56.5
Madagascar	April/March	364.4	28.6	393.0	433.0	54.7	38.1	16.6
Malawi	April/March	143.4	6.6	150.0	510.0	501.5	150.0	351.5
Mozambique	April/March	550.3	133.7	684.0	642.0	253.9	49.6	204.3
Swaziland	May/April	76.8	1.2	78.0	111.0	39.5	11.5	28.0
Zambia	May/April	251.6	18.4	270.0	626.0	302.8	2.8	300.0
Western Africa		2 416.7	159.8	2 576.5	2 672.8	109.5	109.5	0.0
Sahelian Countries		2 416.7	159.8	2 576.5	2 672.8	109.5	109.5	0.0
Burkina faso	Nov./Oct.	227.2	21.9	249.1	241.6	12.5	12.5	0.0
Cape Verde	Nov./Oct.	37.4	36.6	74.0	108.5	37.3	37.3	0.0
Chad	Nov./Oct.	84.1	3.3	87.4	98.1	7.1	7.1	0.0
Gambia	Nov./Oct.	143.2	5.1	148.3	143.5	0.0	0.0	0.0
Guinea Bissau	Nov./Oct.	44.4	6.3	50.7	69.2	0.9	0.9	0.0
Mali	Nov./Oct.	237.2	7.3	244.5	258.0	2.7	2.7	0.0
Mauritania	Nov./Oct.	244.2	34.3	278.5	322.5	12.9	12.9	0.0
Niger	Nov./Oct.	356.5	28.3	384.8	375.0	36.1	36.1	0.0
Senegal	Nov./Oct.	1 042.5	16.7	1 059.2	1 056.4	0.0	0.0	0.0
ASIA		29 330.0	3 081.8	32 411.8	33 123.0	5 867.7	981.2	4 886.5
Afghanistan	July/June	1 183.1	323.8	1 506.9	1 379.0	247.9	175.3	72.6
Armenia	July/June	308.0	37.0	345.0	344.0	69.3	21.3	48.0
Azerbaijan	July/June	721.0	17.0	738.0	629.0	157.8	16.0	141.8
Bangladesh	July/June	1 484.1	531.6	2 015.7	1 604.0	460.6	51.8	408.8
Bhutan	July/June	47.8	6.2	54.0	53.0	0.0	0.0	0.0
China 2/	July/June	9 935.8	64.2	10 000.0	10 800.0	940.4	44.0	896.4
Georgia	July/June	450.0	93.0	543.0	575.0	138.3	26.1	112.2
India	April/March	11.5	187.4	198.9	300.0	93.8	62.8	31.0
Indonesia	April/March	6 469.0	225.0	6 694.0	8 340.0	1 942.2	161.7	1 780.5
Korea, D.P.R.	Nov./Oct.	996.4	888.0	1 884.4	1 084.0	126.0	126.0	0.0
Kyrgyz Republic	July/June	192.0	9.0	201.0	179.0	29.2	8.9	20.3
Mongolia	Oct./Sept.	181.7	56.3	238.0	238.0	0.0	0.0	0.0
Nepal	July/June	66.9	8.1	75.0	70.0	50.0	0.0	50.0
Pakistan	May/April	388.6	94.4	483.0	630.0	45.5	36.0	9.5
Philippines	July/June	4 460.5	249.5	4 710.0	5 000.0	957.0	87.8	869.2
Syria	July/June	1 442.6	13.3	1 455.9	805.0	363.3	0.7	362.6
Tajikistan	July/June	439.0	203.0	642.0	656.0	90.5	23.4	67.1
Turkmenistan	July/June	47.0	7.0	54.0	25.0	4.2	0.0	4.2
Uzbekistan	July/June	505.0	68.0	573.0	412.0	151.7	139.4	12.3
CENTRAL AMERICA		3 906.6	289.0	4 195.6	4 214.0	889.4	257.9	631.5
Cuba	July/June	1 667.9	6.0	1 673.9	1 712.0	159.4	0.0	159.4
Guatemala	July/June	1 030.0	123.4	1 153.4	1 160.0	279.9	95.6	184.3
Haiti	July/June	513.3	81.7	595.0	595.0	175.8	104.8	71.0
Honduras	July/June	509.3	27.3	536.6	527.0	167.2	24.3	142.9
Nicaragua	July/June	186.1	50.6	236.7	220.0	107.1	33.2	73.9
SOUTH AMERICA		867.5	142.8	1 010.3	959.0	212.3	114.5	97.8
Bolivia	July/June	195.9	73.4	269.3	269.0	44.6	39.6	5.0
Ecuador	July/June	671.6	69.4	741.0	690.0	167.7	74.9	92.8
EUROPE		721.8	148.2	870.0	862.0	122.2	74.9	47.3
Albania	July/June	280.3	42.7	323.0	375.0	67.8	20.5	47.3
Bosnia&Herzegovina	July/June	185.4	104.6	290.0	230.0	54.4	54.4	0.0
Macedonia, FYR	July/June	256.1	0.9	257.0	257.0	0.0	0.0	0.0
TOTAL		58 802.7	4 597.0	63 399.7	64 828.8	12 720.3	2 100.1	10 620.2

SOURCE: FAO

for footnotes, see previous page.

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DEFINITIONS:

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

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

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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