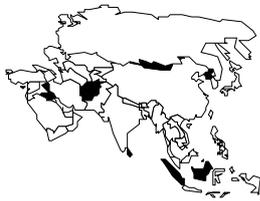


# FOODCROPS AND SHORTAGES

No. 2

May 2004

	<p><b>AFRICA:</b> In eastern Africa, prospects for main season crops improved with average to above-average rainfall in most parts. In Eritrea, however, rains have been persistently poor. A grave humanitarian crisis prevails in western Sudan due to civil conflict which has displaced over 1 million people. In northern and western Africa, the desert locust threat remains extremely serious; control operations are hampered by lack of resources. In southern Africa, Zimbabwe could face acute food shortages as early estimates of 2004 food production indicate a potential food deficit of up to 1 million tonnes of cereals which may require a combination of commercial imports and food aid. This forecast cannot, however, be confirmed at this stage as the FAO/WFP crop and food supply assessment mission could not be completed.</p>
	<p><b>ASI/NEAR EAST:</b> China's 2004 wheat crop has experienced good growing conditions, but output continues to decline due to area reduction. India's wheat output is revised down, but still shows a sharp increase over last year. DPR Korea and Mongolia continue to need food aid. Sri Lanka has been seriously affected by drought and thousands of families are in need of food assistance. In Afghanistan, early snow melt and high temperatures during spring may adversely affect cereal crops. In Iraq, the reduced numbers of international humanitarian workers is affecting delivery of food and other types of assistance.</p>
	<p><b>LATIN AMERICA AND THE CARIBBEAN:</b> Torrential rain and severe flooding in Haiti and Dominican Republic have caused loss of life and damage to property and assets. In Haiti, following improved security, delivery of food assistance is returning to normal, particularly in the Northern department that was recently affected by drought. Food assistance continues to be provided in several Central American countries to families affected by the coffee price crisis. In Argentina and Brazil, the maize crop has been affected by drought. In Ecuador and Peru, dry weather caused a marked reduction in production of winter paddy and first season maize crops.</p>
	<p><b>EUROPE:</b> Weather conditions for the 2004 cereal crops remain generally favourable throughout Europe. A sharp rebound in cereal production is expected in 2004 across the entire region, reflecting generally improved weather conditions after widespread drought last year. In the European CIS, April frost has damaged significant winter cereal areas. Cereal harvests, though significantly up on last year, are still below the good harvests in 2001 and 2002.</p>
	<p><b>NORTH AMERICA:</b> Wheat production in the United States is set to fall sharply from last year because of reduced plantings and unfavourable weather in some parts. By contrast, generally favourable planting conditions have prevailed so far for the coarse grain planting season. Output of coarse grains, especially maize, is forecast to increase. In Canada, seeding progress of the major 2004 cereal crops has been good so far this year and precipitation in early May provided welcome moisture in some persistently dry areas of Alberta. The overall area sown to cereals is expected to decrease in 2004 because of a shift of land into non-cereal crops.</p>
	<p><b>OCEANIA:</b> Australia's 2004 wheat output is forecast at about 22 million tonnes, 3 million tonnes down from last year's record. The planting season started well with good early rains but the return of dry conditions in April, especially in south-eastern parts, has dampened earlier hopes for bumper crops.</p>



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

### COUNTRIES REQUIRING EXTERNAL FOOD ASSISTANCE (total: 35 countries)

<u>Region/Country</u>	<u>Reason for emergency</u>	<u>Region/Country</u>	<u>Reason for emergency</u>
<b>AFRICA (24 countries)</b>		<b>ASIA/NEAR EAST (5 countries)</b>	
<b>Angola</b>	Returnees	<b>Afghanistan*</b>	Effects of recent drought and civil strife
<b>Burundi*</b>	Civil strife, IDPs	<b>Iraq*</b>	Recent war, shortage of inputs
<b>Chad</b>	Refugees	<b>Korea, DPR*</b>	Disasters, train explosion, economic constraints
<b>Central Afr. Rep.</b>	Civil strife	<b>Mongolia*</b>	Economic constraints
<b>Congo, Dem.Rep.*</b>	Civil strife, IDPs and refugees	<b>Sri Lanka</b>	Drought
<b>Congo Rep. of</b>	Civil strife, IDPs		
<b>Côte d'Ivoire</b>	Civil strife, IDPs	<b>LATIN AMERICA (5 countries)</b>	
<b>Eritrea*</b>	Drought, IDPs, returnees	<b>El Salvador*</b>	Effects of adverse weather and economic shocks
<b>Ethiopia*</b>	Drought in parts, IDPs	<b>Guatemala*</b>	Effects of adverse weather and economic shocks
<b>Guinea*</b>	IDPs and refugees	<b>Haiti</b>	Civil strife, drought, floods
<b>Kenya*</b>	Drought in parts	<b>Honduras*</b>	Effects of adverse weather and economic shocks
<b>Lesotho</b>	Drought	<b>Nicaragua*</b>	Effects of adverse weather and economic shocks
<b>Liberia*</b>	Civil strife, IDPs		
<b>Madagascar</b>	Drought in southern parts, cyclones	<b>EUROPE (1 country)</b>	
<b>Mauritania</b>	Drought	<b>Russian Federation (Chechnya)</b>	Civil strife
<b>Malawi</b>	Drought in parts		
<b>Mozambique</b>	Drought in parts		
<b>Sierra Leone*</b>	IDPs		
<b>Somalia*</b>	Civil strife, drought in parts		
<b>Sudan*</b>	Civil strife, drought in parts		
<b>Swaziland*</b>	Drought in parts		
<b>Tanzania, U.R.</b>	Drought in parts, refugees		
<b>Uganda</b>	Civil strife, IDPs		
<b>Zimbabwe*</b>	Adverse weather, economic crisis		

### COUNTRIES WITH UNFAVOURABLE PROSPECTS FOR CURRENT CROPS

<u>Country</u>	<u>Main contributing factor</u>	<u>Country</u>	<u>Main contributing factor</u>
<b>Angola</b>	Adverse weather, returnees	<b>Malawi</b>	Drought
<b>Chad</b>	Refugees	<b>Namibia</b>	Adverse weather
<b>Cuba</b>	Dry weather	<b>Peru</b>	Drought
<b>Ecuador</b>	Drought	<b>South Africa</b>	Drought
<b>Haiti</b>	Drought, civil strife	<b>Sri Lanka</b>	Drought
<b>Lesotho</b>	Drought	<b>Swaziland*</b>	Drought
		<b>Zimbabwe*</b>	Adverse weather, economic crisis

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

Afghanistan, Sudan, Ethiopia

<sup>1/</sup> Both here and in the text, countries with unfavourable prospects for current crop and/or uncovered shortfalls are marked in **boldface**, and those affected or threatened by successive poor crops or food shortages are marked with an asterisk [\*]. Definitions can be found on the Contents page.

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

## CROP AND FOOD SUPPLY SITUATION

### OVERVIEW

As of May 2004, the number of countries facing serious food shortages throughout the world stands at 35 with 24 in Africa, 5 in Asia, 5 in Latin America and 1 in Europe. The causes are varied but civil strife and adverse weather, including drought predominate. In many of these countries, the HIV/AIDS pandemic is a major contributing factor. Recently published joint FAO/WFP Crop and Food Supply Assessment reports highlighting these factors in greater detail can be found at <http://www.fao.org/giews/english/alertes/sptoc.htm>

In **eastern Africa**, improved first season harvests coupled with current favourable main season rains in most parts have boosted food supply prospects. However, flood damage in Kenya and Djibouti and flood warnings for southern Somalia following rising river levels over the Shabelle river basin give cause for concern.

In Eritrea, the food outlook is rather bleak mainly due to the poor performance of the "azmera" (March-May) rains which normally facilitate land preparation and replenishment of water supplies and pastures. In addition, rains that normally fall along Eritrea's eastern and coastal areas from November to February largely failed for the fourth consecutive year.

The devastating civil conflict in western Sudan (Darfur) has resulted in the displacement of over a million people, with large-scale destruction of property and assets. Access to food and other basic human needs has been severely curtailed for the affected population. With the conflict still unabated, the next planting season which is about to start is jeopardised.

In **southern Africa**, the 2003/04 agricultural season is drawing to a close. FAO/WFP Crop and Food Supply Assessment Missions (CFSAMs) are underway in Angola, Lesotho, Malawi, Mozambique and Swaziland. A curtailed Mission also started in Zimbabwe. Results will be finalized in June. In this sub-region the first half of the season was characterized by delayed, inadequate and erratic rains. Crop prospects improved with more favourable rainfall during the second half of the season (February to April). However, intense rains during this period in parts of Zambia and Angola caused many rivers to overflow causing serious flooding in western Zambia and in downstream parts of Angola, Namibia, Botswana and Zimbabwe, damaging crops and necessitating emergency food relief. Madagascar was hit by cyclones in January, February and March causing large-scale damage, affecting 774 000 people and some 300 000 hectares of vanilla, paddy and other crops. Harvest prospects in Zimbabwe, South Africa, Lesotho, Swaziland, and parts of Malawi and Angola are unfavourable due to dry weather conditions especially during first half of the season. Zambia, Botswana and Namibia, on the other hand, are expecting normal to above normal harvests. The HIV/AIDS pandemic is compounding food security problems in most of the countries.

The food situation in Zimbabwe is potentially critical as early estimates indicate a harvest lower than the reduced level of 2003. The food deficit in 2004/05 (April/March) could be as much as 1 million tonnes to be filled by a combination of commercial imports and food aid.

In **the Great Lakes region**, harvesting of the second season crops, mainly sorghum, maize and beans, will begin soon. Food production in Rwanda from the first season has been estimated at about the same level as last year. In Burundi, total production of cereals, legumes, roots/tubers and banana/plantain is estimated at 1.1 million tonnes, about 2 percent higher than the year before but still below the pre-crisis (1988-93) average. In the Democratic Republic of Congo, food insecurity and malnutrition remain serious problems due to persistent instability, particularly in the east and northeast.

In **central Africa**, food insecurity remains serious in the Central African Republic (CAR) for conflict-displaced populations.

In **northern Africa**, desert locusts continue to pose a serious threat to food security for several countries in spite of considerable control operations. Crop damage is limited so far, but the situation could deteriorate if swarms move southwards to the Sahelian countries as the cropping season sets in. In spite of assistance to several countries affected in northern and western Africa, by FAO and several donors, control operations continue to be hampered by insufficient resources. However, prospects for the winter cereal crops in Algeria, Egypt, Morocco and Tunisia remain favourable as a result of favourable weather conditions and adequate availability of inputs.

In **western Africa**, seasonably dry conditions prevail in the Sahel. The desert locust situation is very serious in Mauritania, where control operations are hampered by lack of resources. Overall in the Sahel, however, the food supply situation is satisfactory, reflecting good harvests in 2003. Production was significantly above average in all countries except Cape Verde and Guinea-Bissau. The rainy season has started in the coastal countries along the Gulf of Guinea and planting is underway.

In **Asia**, harvesting of the winter cereal crops is underway or completed, while the sowing of paddy and coarse grain crops has started. Some countries experienced insufficient precipitation, but its impact on overall production is limited since winter crops are generally irrigated. Grain supply in the region has been tight with rising prices for major grains since last fall. The total sown area and output for cereals in Mainland China have declined by more than 15 and 17 percent, respectively, from 1998 to 2003. However, the rice area is expected to increase in 2004 due to government policies. In India, the 2004 wheat area and output are estimated well above last year and five-year average. India is the second largest producer of wheat after China.

A serious humanitarian crisis persists in DPR Korea due to chronic food shortages and the recent disastrous train explosion. With the recent arrival of donated maize and wheat, all but 600 000 core beneficiaries received their WFP full cereal rations in April. New pledges of about 123 000 tonnes of mixed commodities are urgently required to cover needs over the next six months.

Mongolia continues to depend on international food assistance due to natural disasters and economic constraints despite a better winter in 2003/04. In Timor-Leste, harvests of major crops are estimated to increase significantly over the drought-affected crops last year due to more favourable weather. Drought in Sri Lanka during Maha season, especially in the districts of Kurunegala, Anuradhapura and Puttalam, resulted in significantly reduced paddy production and thousands of families are in need of food assistance.

In Afghanistan, unusually warm weather during spring and late winter with consequent early snow-melt has somewhat dampened hopes of matching last year's record harvest.

In the **Near East**, security problems in Iraq and the subsequent evacuation of most international NGO staff from the south and centre have adversely affected humanitarian assistance programmes.

In the **Asian CIS**, weather conditions have been generally favourable to crop production and cereal crops are reportedly in good condition. A total of about 19 million hectares have been planted with cereals. Late spring and summer precipitation and air temperatures will be critical for crop production in the region. Assuming favourable weather conditions and adequate flow of water in the main rivers of the region, aggregate cereal harvest is tentatively forecast at more than 28 million tonnes.

In **Central America and the Caribbean**, torrential rain and severe flooding in Haiti and Dominican Republic have caused loss of life and damage to property and assets. Harvesting of the third *apante* cereal and bean crops has been completed and planting of 2004/05 first (main) season crops has started. Aggregate cereal output in 2003/04 is estimated at 36.4 million tonnes, about 1.0 million tonnes above the last five years average, particularly due to good harvests in Mexico, Honduras and Nicaragua. Early forecast for 2004/05 points to a reduction in cereal production, mainly due to the unfavourable prospects for wheat in Mexico. The coffee sector, the principal foreign exchange earner, is still suffering from declining international prices. Food assistance continues to be provided to vulnerable rural groups in Central American countries. In Haiti, the international community has resumed delivery of food assistance, especially to the North West Department that was seriously affected by drought in March.

In **South America**, harvest of the 2003/04 maize crop is underway. In Argentina, maize production is expected to significantly decrease due to dry weather conditions at sowing. In Brazil drought is also affecting the winter "safrinha" maize crops in southern states and the summer maize crop in centre-south states. Wheat planting in southern and central parts of South America is about to start and planting intentions point to an area increase of 3 percent. In Uruguay, harvesting of paddy is underway and production is estimated at a record 1.3 million tonnes. In Peru and Ecuador, dry weather conditions in the first months of 2004 severely affected paddy and maize crops.

In **Europe**, weather conditions for the 2004 cereal crops remain generally favourable across the region. Cereal output in the EU-25 is forecast to increase substantially from last year, with significant improvements seen in both the EU-15 countries and the 10 new member countries in central Europe. Planted areas have

increased and better yields are expected reflecting generally adequate moisture availability this season so far. Larger crops are also forecast in the Balkan countries in the southeast of the region reflecting generally favourable weather after drought in the previous year.

In the **European CIS**, March and April frost has damaged nearly three million hectares of cereals, mainly in the Russian Federation and the Ukraine. In addition, lack of access to sufficient farm inputs prevented many farmers in the two large producing countries to reach the high areas planted in 2001 and 2002. An aggregate of about 61 million hectares of cereals have been planted in the region. Provided that favourable weather conditions prevail during late spring and summer, aggregate cereal harvest in the region is tentatively forecast at about 115 million tonnes. This includes some 59 million tonnes of wheat and about 55 million tonnes of coarse grains.

In **North America**, wheat production in the United States is set to fall sharply by 11 percent from last year to 56.6 million tonnes after a significant decline in winter plantings and the prospect of a reduced spring wheat area also. In addition, weather conditions have been generally less favourable during the current season, especially in southern producing regions where dryness prevails and the yield potential of crops has suffered as a result. Conditions in the past month have, however, favoured the summer coarse grain planting prompting a significant increase in the production forecast for 2004 to 284.3 million tonnes, 3 percent above the previous year's crop and almost 8 percent above the average of the past five years. In Canada, as of 10 May, overall seeding progress of the major 2004 cereal crops was estimated at 26 percent complete, slightly ahead of the normal 20 percent for the corresponding date. The overall area sown to cereals is expected to decrease in 2004 because of a shift of land into non-cereal crops. Output of wheat is nevertheless forecast to increase slightly because of higher yields expected for durum, while production of coarse grains is expected to decrease marginally.

In **Oceania**, after a satisfactory start to the winter crop planting season earlier this year, a return to drier conditions in late April and early May, especially in the eastern regions, dampened hopes of a bumper output this year. Farmers in south-eastern Australia are delaying planting in the hope that more rain will arrive before the end of the acceptable planting period in June.

## COUNTRY REPORTS

### AFRICA

#### **NORTHERN AFRICA**

##### ALGERIA (11 May)

The Desert Locust situation remains extremely serious in spite of intensive ground and aerial control operations. Immature and mature groups as well as small swarms have been reported in different regions of the country. 23 out of the 48 departments of the country have reportedly been affected. Although over 560 000 hectares of infestations have been treated as of 10 May, and intensive control efforts are still underway, the current crop could be affected. Nevertheless, a good harvest is anticipated, reflecting generally good meteorological conditions since the start of the cropping season, adequate availability of agricultural inputs and the implementation of the Agricultural Development Plan set up by the Government in 2000.

Aggregate production of cereals in 2003 is estimated at a record 4.2 million tonnes, a significant recovery from the 2002 drought-affected crop of 1.5 million tonnes and double the average for the preceding five years. As a result, imports of cereals in 2003/04 (July/June) are expected to decrease by more than 2.6 million tonnes to about 4.8 million tonnes.

##### EGYPT (11 May)

Overall crop prospects are favourable, reflecting favourable weather conditions, larger planted area and adequate availability of inputs. Production of the mainly irrigated wheat crop is tentatively estimated at 7.19 million tonnes, up 5 percent from the above average production of last year. Barley output is anticipated to increase by 76 percent to 248 000 tonnes in 2004, driven mainly by a significant expansion in cultivated area.

Wheat imports in marketing year 2003/04 (July/June) are expected to be about 6.4 million tonnes, while maize imports are projected at about 5.2 million tonnes.

##### MOROCCO (11 May)

Aerial and ground control operations are underway against Desert Locust hopper groups and bands. Although over 347 000 hectares were treated in April, the current crop could be at risk in the coming months. Following below average rains from mid-December through mid-February, which affected crops and pasture in several regions, precipitation has improved significantly since late February, and remained widespread and regular. As a result of these favourable conditions, crops are growing satisfactorily and cereal production is anticipated to be markedly higher than the average for the previous five years, and the bumper crop of 7.96 million tonnes harvested last year. Wheat production is officially estimated at 5.4 million tonnes.

Production of both wheat and barley in 2003 increased by more than 50 percent to 5.15 million tonnes and 2.62 million tonnes, respectively. Reflecting this bumper harvest, imports of cereals in the marketing year 2003/04 (July/June) are forecast at about 2.2 million tonnes, a reduction of nearly 2 million tonnes compared to the previous year.

##### TUNISIA (12 May)

Prospects for the 2003/04 winter crops to be harvested from May/June are good due to favourable weather conditions, larger area sown and adequate availability of agricultural inputs. Aggregate cereal production in 2004 is tentatively forecast at 2.1 million tonnes, which is lower than the record crop of 2.9 million tonnes in 2003, but remains above the average for the previous five years.

Imports of wheat in 2003/04 (July/June) are forecast at 0.6 million tonnes, sharply down compared to 1.4 million tonnes estimated for the previous year. Imports of maize are anticipated to remain at the previous year's level of 0.75 million tonnes.

## **WESTERN AFRICA**

### **BENIN (7 May)**

The first rains started in April in the south, allowing planting of the main maize crop due for harvest from July. Following a well above-average cereal harvest in 2003, estimated at about 1 million tonnes (including paddy), the overall food supply situation is satisfactory. Markets are well supplied and prices of cereals are generally stable.

Cereal imports (including re-exports) for domestic use during the 2004 marketing year are estimated at some 138 000 tonnes, mostly wheat and rice.

### **BURKINA FASO (7 May)**

Seasonably dry conditions prevail. Exceptionally favourable weather last year resulted in a record cereal crop for the second year in succession. Following release of the final 2003 cereal production figures, the aggregate cereal production is estimated at 3.6 million tonnes, an increase of about 16 percent over the record crop of the previous year. As a result, the overall food supply situation is satisfactory and farmers will be able to increase their grain stock. More than 450 000 tonnes of cereals are available for export and possible stock build-up in the country and cereal prices are much lower than in previous years.

Cereal import requirement in the marketing year ending in October 2004 (mostly rice and wheat) is forecast at 268 000 tonnes.

### **CAPE VERDE (7 May)**

A joint FAO/CILSS Crop Assessment Mission, which visited the country in October last year, estimated production of maize – the only cereal grown – for 2003 at 15 800 tonnes. This is 79 percent above the drought-affected crop in the previous year but remains below average. However, also in a normal year, domestic production covers only one-fifth of the country's cereal utilization requirement and the balance has to be imported.

For the marketing year 2003/04 (November/October), imports of cereals are forecast at some 86 000 tonnes, including 39 000 tonnes of food aid.

### **CHAD (7 May)**

Following release of the final production estimates by the national statistical services, the aggregate 2003 cereal production is estimated at a record 1.62 million tonnes (including rice in paddy terms), some 400 000 tonnes more than both the previous year and the average for the preceding five years. Sorghum and millet accounted for the bulk of the crop with 0.56 million tonnes and 0.52 million tonnes, respectively.

The cereal import requirement for the marketing year ending in October 2004, mainly wheat, is estimated at 97 000 tonnes. About 83 000 tonnes are anticipated to be covered by commercial imports.

The overall food supply situation is satisfactorily. In the deficit areas of the north the food supply position will improve this year as a result of increased millet production. **However, fighting in the Darfour region of Sudan led to the influx of at least 110 000 refugees. New estimate by**

Refugees International in mid-May put the number of Sudanese refugees in Chad at 200 000. As of late April, about 42 000 refugees had been relocated in five camps in eastern Chad by UNHCR. The rest are living in makeshift shelters or in the open air over 600 km along the Sudan-Chad border. WFP has been pre-positioning food for the refugees and host populations.

#### **COTE D'IVOIRE (7 May)**

Due to persistent insecurity, conflict-induced population displacement and inadequate availability of agricultural inputs, cereal output in 2003 declined for the second consecutive year. Aggregate cereal production was estimated by a joint FAO/WFP Crop and Food Supply Assessment Mission at 1.46 million tonnes, lower than both the 2002 level and the average of the previous five years. The overall food supply position has recently shown signs of improvement, particularly in the areas where NGOs have access and where supplementary programmes are in place. In addition a number of internally displaced persons have been returning to their areas of origin. WFP has recently extended the May–December 2003 emergency operation to December 2004. This operation is targeting displaced individuals as well as other vulnerable populations in the north and west.

The security situation is still volatile. In the regions under rebels control the health situation is almost totally dependent on humanitarian intervention and seems to run at only 30 percent of its normal capacity, according to OCHA. Food security for many households continues to be hampered by disruption of livelihoods. In particular, smallholder cash-crop producers are experiencing a significant loss of income.

Total cereal import requirements in 2004 were estimated by the mission at about 1.4 million tonnes, virtually unchanged from last year, of which about 1.2 million tonnes would be obtained on commercial terms, leaving about 184 000 tonnes to be met through external assistance.

#### **GHANA (8 May)**

Planting of the 2004 main maize crop, to be harvested from July, is underway. After erratic and below normal rains in the South at the beginning of the 2003 growing season, better precipitation occurred during the minor season. Rainfall was also very good in the Northern Sector of the country. Following that mixed rainfall pattern, the 2003 aggregate cereal crop, estimated at about 2 million tonnes (including rice milled), is 12 percent higher than the average for the previous five years but about 6 percent down from the previous year. Compared to 2002, the important maize crop decreased by 10 percent, rice by 13 percent, yam and cocoyam by about 2 percent while millet, sorghum and cassava increased by 10 percent, 7 percent and 5 percent respectively.

Cocoa production is estimated to have reached 490 000 tonnes, the highest level since 1964/65, which along with higher producer prices has improved access to food for the estimated 1.6 millions peasant farmers who produce most of the country's cocoa.

The crises in Côte d'Ivoire and Liberia have resulted in an influx of third-country nationals in transit through Ghana to their home countries, Ivorians and Liberians seeking asylum and the return of Ghanaian nationals. It is reported that in mid-January 2004 some of the 42 000 Liberian refugees in the country started to return home.

#### **GUINEA\* (8 May)**

Despite localized floods, weather during the 2003 growing season was generally favourable. Thus, output from the 2003 cereal harvest, mostly rice, is currently estimated at an average level of about 1 million tonnes, fractionally more than last year's production.

Although the restoration of peace in Sierra Leone has resulted in a decrease of the number of refugees from that country, Guinea still hosts a large number of refugees. UNHCR statistics as of mid-April indicate that 104 291 refugees reside in the seven refugees camps in Guinea. In addition to the refugees settled in camps, around 70 000 refugees were living outside camps, according to OCHA. The majority of the refugees are Liberian (89 000), followed by Sierra Leonean (15 400) and Ivorian (6 800).

In an attempt to bring down increasing food prices, the Government has recently decided to sell directly to the public 20 000 tonnes of rice at controlled prices.

#### GUINEA-BISSAU (8 May)

Final 2003 production figures have been released by the government and are significantly lower than the estimates of the CILSS Crop Assessment Mission in October 2003. The aggregate output of cereals is now estimated at 121 455 tonnes, which is 19.8 percent below the 2002 level and 20 percent below the average for the previous five years. Cashew nut production, the main export of the country and main source of income for farmers, also declined in 2003, which along with lower producer prices affected farmers' purchasing power. Although staple food prices remain stable, close monitoring of the food supply position of the people living in the chronically food-deficit areas along the border with Senegal is recommended.

Import requirement of cereals in the marketing year ending in October 2004 is forecast at some 72 000 tonnes, including 14 000 tonnes of food aid.

#### LIBERIA\* (8 May)

Planting of the paddy crop, virtually the only cereal grown in the country, has started. With the end of the civil war and the consequent return of many displaced farmers, rice production in 2004 is expected to recover somewhat from last year's very low level, although shortage of seeds and tools are reportedly preventing most of the farmers from cultivating. Aggregate cereal imports in 2004 are estimated at 187 000 tonnes; food aid is estimated at 50 000 tonnes.

It has been estimated that, since October 2003, more than 50 000 Liberian refugees in Sierra Leone and Guinea have spontaneously returned to their war-torn country. Since most of them have ended up in IDP camps due to insecurity, the UNHCR urged the estimated 300 000 Liberian refugees scattered across West Africa not to return home. The agency plans to start organised repatriation in October once the rainy season is over. In addition to refugees, over 500 000 Liberians displaced by fighting are living in Liberia and its periphery.

The UN resumed its disarmament programme in mid-April. An estimated 40 000 former combatants are expected to be disarmed. With the improvement of the security situation, WFP, which had launched a large-scale distribution programme, has recently extended its operation to other parts of the country outside the capital of Monrovia. Full-scale distributions were carried out, for the first time since July 2003, in Saclepea town and the surrounding villages. As of late April, a total of 279 655 school children received food assistance under the Emergency School Feeding Programme.

In mid-April, the UNHCR appealed for funds for its programmes for Liberian and Sudanese refugees. For its refugees related activities in Liberia, the agency still had a shortfall of US\$25.2 million, as of late April.

#### MALI (8 May)

Aggregate cereal production in 2003 has been estimated at a record 3.4 million tonnes, more than one-third higher than the below-average crop of 2002 and markedly above the average for the previous five years. Production of millet and rice, the most important crops, has increased by 41

percent and 36 percent, respectively. Good weather favoured also cotton output estimated at 613 000 tonnes, up 46 percent from previous year. Reflecting this good harvest, the food supply position this year is expected to be satisfactory. The food situation should also improve in the structurally food-deficit areas of the north.

#### **MAURITANIA (10 May)**

**The desert locust situation remains extremely serious in the country. Considerable damage to crops is reported in oases and pastures, but control operations continue to be hampered by lack of resources. According to official estimates, US\$6 million are needed to treat about 500 000 hectares infested.**

**Aggregate cereal production in 2003 has been recently revised by CILSS to about 200 000 tonnes, some 73 percent higher than in 2002 and sharply higher than the average for the previous five years. This good crop comes after three consecutive drought-reduced harvests that resulted in near-famine conditions in several regions.**

**Mauritania is a food import-dependent country whose domestic production covers less than half of the country's cereal utilization requirement in a normal year. Food security is heavily dependent on trade and the exchange rate of Ouguiya, the national currency. Due to the steady depreciation of the Ouguiya against the Euro and the CFA franc since the beginning of 2003, cereal prices have been rising significantly in spite of the good harvest and considerable imports from neighbouring CFA countries. This situation is seriously affecting food security of many rural and urban households across the country.**

**Cereal import requirements for the 2003/04 marketing year (November/October) are forecast at about 315 000 tonnes, mostly wheat. This includes 30 000 tonnes of wheat for re-export.**

#### **NIGER (10 May)**

Favourable weather conditions, larger area sown and adequate availability of agricultural inputs resulted in increased cereal production for the third consecutive year. The aggregate 2003 cereal production is estimated at a record 3.57 million tonnes, some 7 percent more than the bumper crop harvested in the previous year. Output of millet, by far the most important crop, increased by 175 000 tonnes to 2.74 million tonnes. Pastures are abundant reflecting good rains in the pastoral zones. The overall food supply position remains satisfactory also reflecting adequate stocks and relatively low prices of staples. Although cereal prices remain much lower than in previous years, prices did not collapse as feared at the beginning of the marketing year, due mainly to increased cereal exports to neighbouring countries, reflecting a more integrated regional cereal market.

Notwithstanding the good harvest, a total of about 398 000 tonnes of wheat, rice and maize, for which the country has a structural deficit, will need to be imported in the 2003/04 marketing year (November/October).

#### **NIGERIA (10 May)**

Land preparation and planting of the main maize crop are underway in the south. In spite of exceptionally favourable weather conditions in 2003, the country did not achieve a bumper crop due mainly to shortages and higher prices of fertilisers, which affected fertilizer-dependent crops such as maize and rice. Aggregate cereal production has been estimated at 23.9 million tonnes, fractionally higher than both in 2002 and the average for the previous five years.

Cereal imports have trended upwards in recent years, due mainly to high urban population growth and changing consumption pattern. Imports of cereals, mostly wheat and rice, are estimated at about 4.33 million tonnes in 2004, up from 4.07 million tonnes in 2003. In early May, an outbreak of violence in central and northern Nigeria resulted in the death of at least 600 people and the displacement of thousands others.

#### SENEGAL (10 May)

Following release of final production estimates by the national statistical services, the aggregate 2003 cereal production is estimated at a record 1.45 million tonnes, almost double the previous year's poor harvest and 57 percent higher than the average for the previous five years. Groundnut production, the main source of cash income for rural households, was estimated to have increased by 70 percent to 441 000 million tonnes. This is due to good rains and a marked expansion of cultivated area, driven by government programmes with the assistance of FAO. Output of maize, the second most important cereal crop, increased six-fold to 400 000 tonnes.

Production of beans, sesame and watermelon also increased significantly. The overall food supply position remains satisfactory reflecting adequate stocks and relatively low prices of staples.

#### SIERRA LEONE\* (10 May)

**Following increasing plantings by returning refugees and farmers previously displaced, as well as comparatively improved conditions for the distribution of agricultural inputs, cereal production in 2003 has been estimated at about 450 000 tonnes, some 8 percent higher than in 2002. Cereal imports in 2004, mostly rice, are forecast at some 287 000 tonnes, compared to 296 000 tonnes imported last year.**

**The security situation in the country remains calm. Repatriation activities continue for the Sierra Leonean refugees returning from Guinea. In mid March, the Government estimated that 90 percent of the Sierra Leoneans who left the country during the civil war (1991-2001) have returned home. An estimated 1 million internally displaced people have also been resettled.**

#### THE GAMBIA (10 May)

The aggregate 2003 cereal production has been estimated at a record 213 338 tonnes, an increase of some 53 percent over the previous year's poor crop and markedly above the average for the preceding five years. Output of groundnut, the main source of cash income for rural households, was estimated to have increased 30 percent to about 93 000 tonnes.

Domestic cereal production in The Gambia covers less than half of the country's utilisation requirement in a normal year and food prices are strongly affected by the exchange rate of the Dalasis. The country experienced sharp increases in prices in 2003 due a 43 percent depreciation of the Dalasis against the US dollar in the 12 months to September 2003. Since then the currency has stabilized and the rate of decline is forecast to be moderate in 2004.

Reflecting the good harvest, the increase in producer price of groundnut and the relatively stable exchange rate, the food situation this year is expected to be satisfactory. However, in districts affected by floods and grasshopper infestations, a number of households may experience food difficulties during the year.

#### TOGO (10 May)

Land preparation and planting of the first maize crop are underway in the south. Following generally good climatic conditions, aggregate cereal production in 2003 is estimated at 815 000 tonnes, some 10 percent more than the previous year and markedly above the average for the five preceding years.

Output of maize, the main cereal crop, has increased by some 11 percent to 0.54 million tonnes. Production of cassava and yam, important staple food crops, also increased significantly. Markets are well supplied and the overall food supply position is satisfactory.

Cereal imports in 2004, mainly rice and wheat, are anticipated at about 170 000 tonnes, including re-exports.

## **CENTRAL AFRICA**

### **CAMEROON (10 May)**

Satellite imagery indicates that the rainy season started on time, allowing land preparation and sowing of the first 2004 maize crop, due for harvest from July. Following overall favourable growing conditions, cereal production in 2003 is estimated to have increased by 10 percent to 1.4 million tonnes. Output of maize and sorghum, by far the most important cereals, both are estimated to have increased by some 10 percent to 0.7 million tonnes and 0.58 million tonnes, respectively.

Cereal import requirements for 2004, mainly wheat and rice, are estimated at some 387 000 tonnes, slightly increased from the previous year. Food aid in rice is estimated at 2 000 tonnes. Declining oil production should be partially offset this year by higher prices.

### **CENTRAL AFRICAN REPUBLIC (CAR) (10 May)**

**Cereal output in 2003 is expected to have decreased for the second consecutive year to an estimated 125 000 tonnes. Despite overall favourable weather, persistent insecurity – notably in the north – inadequate availability of agricultural inputs and mass population displacements have resulted in a decrease in the area sown to cereals.**

**Imports of cereals in 2004 are tentatively estimated at some 46 000 tonnes, slightly higher than last year's requirement.**

**Although most of the 230 000 IDPs have returned home an estimated 41 000 refugees from CAR are still living in Chad.**

### **CONGO, DEMOCRATIC REPUBLIC OF\* (18 May)**

**Numerous violent clashes were reported in Butshori, Rusekera, Maroba, Tshajinge, Kagando, Kirumba and Shomi in the northeast of the country. Although there remain serious security hazards, the overall security situation has been improving, making it easier to provide assistance to the internally displaced persons and returning refugees. The country has been granted a US\$39 million loan by the International Monetary Fund (IMF) under the country's Poverty Reduction Strategy and Growth Facility (PRGF) to foster growth and reduce poverty in the country. The nutritional situation of the population is generally very poor throughout the country.**

### **CONGO, REP OF (10 May)**

**Domestic cereal production covers about 2 percent of total requirements; the balance is imported, mostly on commercial terms. In 2004 the import requirement of cereals, mainly wheat, is estimated at some 185 000 tonnes, virtually unchanged from the previous year.**

**Following the peace agreement between the Government and the rebels in March 2003, the country now is facing a major challenge: to establish lasting peace and reintegrate former combatants into civil society. To meet this challenge the Government and several international organizations have set up a disarmament, demobilization and reintegration (DDR) programme for former militiamen. The last 3 250 displaced people who were still living in camps near Brazzaville returned home in mid-April. However, the security situation remains volatile and hampers humanitarian aid.**

**WFP is facing a serious shortfall in resources as its programme over the last two years was funded at only 46 percent and the new programme is yet to receive pledges. WFP is focussing more on emergency assistance to the most vulnerable groups (IDPs, returnees and malnourished households), while continuing to participate with other partners in rehabilitation operations as far as resources permit.**

#### **EQUATORIAL GUINEA (10 May)**

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

#### **GABON (10 May)**

The main foodcrops are cassava and plantains. The only cereal crop grown is maize which is sown from July and harvested from November. In a normal year production reaches about 30 000 tonnes. Imports of cereals in 2004, mainly wheat and rice, are estimated at some 90 000 tonnes.

#### **SAO TOME AND PRINCIPE (10 May)**

The staple foodcrops are roots, plantains and tubers. Annual imports of cereals are estimated at some 12 000 tonnes. Food aid needs for 2004 are estimated at about 1 000 tonnes.

### **EASTERN AFRICA**

#### **BURUNDI\* (17 May)**

**Harvesting of the 2004 second season food crops, mainly sorghum, maize and beans, is about to start with the early forecast of below normal crop output. Generally the 2003/04 main agricultural season has been favourable in much of the country for main crops planted in September–October 2003. Some hail damage in hilly areas in Ruyigi province and outbreaks of animal diseases in Mwaro province were reported early in the season. In early March, torrential rains caused flooding in Burundi's north-western province of Bubanza, displacing some 10 000 people and destroying fields of beans and other legumes in the area.**

**The results of a crop assessment organized by the Government and FAO/WFP/UNICEF in January 2004 indicate food production (cereals, legumes, roots/tubers, and banana/plantain) during the first season (A) in 2004 at 1.1 million tonnes, about 2 percent higher than last year. Including seasons B and C, total food production in 2004 is forecast at 3.83 million tonnes. The Mission also estimated a total food import requirement in cereal equivalent of 300 000 tonnes, including 277 000 tonnes in food aid. An estimated 40 000 to 60 000 people have been displaced in Bujumbura Rural, following fresh fighting between the army and the rebels.**

#### **ERITREA\* (1 May)**

**Planting of the 2004 cereal and pulse crops is not scheduled until June. However, poor "azmera" (March-May) rains which normally assist land preparations and replenishment of water and pasture, do not augur well for crop prospects. In addition, rains that normally fall along Eritrea's eastern and coastal areas from November to February have largely failed for the fourth consecutive year, raising fears of another drought.**

**The 2003 grain production was generally poor and cereal output is now estimated at 105 000 tonnes, about 55 percent below average. Consequently, the cereal import requirement for 2004 has been estimated at 415 000 tonnes, of which 90 000 tonnes is estimated to be imported commercially. The uncovered cereal deficit – for which international assistance is urgently required – amounts to 325 000 tonnes. In response to the overall low supply of grain, prices are generally high in most urban markets.**

Overall, nearly 1.9 million people are currently estimated to be in need of food assistance. Reports indicate serious concerns over the lack of pledges and low levels of food aid stocks that have prompted a reduction in amounts of ration and number of targeted beneficiaries.

#### **ETHIOPIA\* (1 May)**

Prospects for the 2004 secondary “belg” grain crops have improved considerably following beneficial rains in several parts of the country. The belg crop accounts for some 10 percent of total grain production but in some areas it provides most of the annual grain production. Good rains in April have also helped the replenishment of pasture and water in the lowland areas of the south and south-east.

In 2004 about 7 million vulnerable people are estimated to require food assistance, while an additional 2.2 million will require close monitoring. Following recent assessments, relief food requirements for 2004, earlier estimated at about 980 000 tonnes, are revised down by about 100 000 tonnes, mainly due to better than expected weather conditions. The recently-issued "Cereal Availability Study" estimated the amount of maize, wheat and sorghum available for local purchase for humanitarian operations in 2004 at between 300 000–350 000 tonnes.

#### **KENYA\* (1 May)**

Prospects for the 2004 main “long rains” season crops are generally favourable. Weather forecasts indicate that major cereal producing areas of the country were likely to receive normal to above normal rains while more marginal agricultural districts of North Rift, North Eastern, Eastern and Coast Provinces were likely to receive normal to below normal rains. Ministry of Agriculture preliminary forecast for the long rains crop is put at about 2.28 million tonnes, nearly 11 percent above average. Recent heavy rains and floods, mainly around River Nyando in the west have resulted in several deaths and damage to crops, livestock and property.

The recently harvested 2003/04 secondary “short rains” maize crop is estimated at a slightly below average 360 000 tonnes of maize. This crop provides the main source of food in parts of Central and Eastern provinces. Maize prices stabilised in March coinciding with the short rains harvest but are still higher than average. With the anticipated maize deficit prices are expected to rise in the next several weeks. The early long rains harvest is not expected to start until late July 2004

#### **RWANDA (19 May)**

In Rwanda, the 2003/04 main season started in September-October with normal to erratic rains. However, following a favourable rainfall season during the January to April growing period, favourable crop harvest of maize, sorghum and beans is expected. A joint FAO/WFP/Government assessment in December estimated Season A national crop production at 3.5 million tonnes about the same as the year before. The second season crops, maize, sorghum and beans are growing under near normal weather conditions.

The country has a sizable food deficit requiring food aid of about 35 000 tonnes of cereals. According to WFP, the food pipeline for April to September 2004 appears sufficient to cover food aid requirements. Food assistance is likely to be required for vulnerable groups in the areas affected by dry weather, where food difficulties were already being experienced in the past months.

#### **SOMALIA\* (1 May)**

Recent rains in parts have improved prospects for the main “gu” cereal crops which account for some 75-80 percent of the annual production in normal years. However, more rains are necessary to achieve good yields. A flood advisory was recently issued in response to alarmingly rising river levels. Two weeks of above normal rainfall in April over the Shabelle river basin in both the Ethiopian highlands and Somalia have resulted in rising river levels which need close monitoring.

Serious humanitarian concerns continue to be expressed in several areas of northern and central regions as a result of cumulative effects of successive droughts. The Food Security Assessment Unit (FSAU) has recently reported that Sool Plateau, North Nugal and South Bari, and parts of North Mudug and South Nugal remain in a state of humanitarian emergency. In some areas destitute pastoralists have congregated steadily to form camps in villages, along roads, and at permanent water points in Sool and Nugal. Water shortages, depleted pastures and exorbitant water prices still affect much of the region.

Estimates of the secondary *deyr* season cereal crop, harvested in February, are put at about 101 000 tonnes, well below the previous year’s output.

#### **SUDAN\* (1 May)**

Harvesting of the 2003 wheat crop is complete and output is expected to be similar to last year’s crop. The 2003/04 (marketing year) total cereal production is now estimated at 5.9 million tonnes, about 54 percent above last year’s crop and about 36 percent above the average of the last five years.

Despite the overall good harvest, the escalating civil conflict in the west has resulted in massive displacements of over a million people, and access to food has been sharply curtailed. People have lost the bulk of their last harvest. With the conflict still unabated, the next planting season is jeopardised.

An Emergency Operation was jointly approved in April 2004 by FAO and WFP for food assistance for 1.18 million people affected by war in Greater Darfur, worth US\$99.4 million for a period of 9 months (1 April 2004 to 31 December 2004).

#### **TANZANIA, UNITED REPUBLIC OF (1 May)**

Prospects for the 2004 main season coarse grains in the unimodal rainfall areas are generally favourable. Crop production is expected to be close to normal in most producing areas but low rainfall in Dodoma, Singida, Mara, Manyara, Arusha and Tanga may affect yields. The climate outlook for March to May 2004 suggests that the rainfall is expected to be near normal in most parts of the country with a slight probability of above-normal rainfall in parts of the extreme north coast, northern, western and southern Tanzania. There will also be a slight probability of below-normal rainfall for the rest of the country. The unimodal rains (*msimu*) are reported to have performed well.

The overall food supply situation is expected to improve with ongoing harvests in the central and southern regions. Prices of maize have started to decline in most markets from April (except Mtwara, Moshi, Tanga and Arusha) by more than 5 percent from the high levels in February.

## **UGANDA (1 May)**

Prospects for the 2004 main season cereal crops are generally favourable. Normal to above normal rains were experienced from late March in many parts of the country, notwithstanding reports of two to three weeks delay in the start of the season.

Eastern and northern regions of the country remain areas of major concern due to insecurity. In northern Uganda, the internally displaced are estimated at more than 1.2 million people. Access to water, sanitation and health services remains inadequate. Limited access to land in the north is a key impediment to crop production and as a result IDPs rely on food aid for a large portion of their dietary requirements. In eastern Uganda (Teso), despite a relative lull in insecurity, some 330 000 people remain displaced.

In order to meet the food needs of an estimated 2.2 million people including 1.6 million IDPs and other vulnerable people, WFP requires 24 600 tonnes of food commodities per month. Between May and December 2004, the agency projects a shortfall of 106 000 tonnes of food, for which urgent and generous contributions are sought.

Livestock in much of the country have adequate access to drinking water and pasture. In drought-prone Karamoja, most cattle have moved back closer to kraals following the onset of the rains there. Household food stocks are reported adequate while cereal prices have remained stable over the past four months.

## **SOUTHERN AFRICA**

### **ANGOLA (19 May)**

The 2003/04 agricultural season is drawing to a close with harvesting currently under way. A joint FAO/WFP Crop and Food Supply Assessment Mission is currently in the country to carry out an assessment of the outcome of the season. Given the generally erratic precipitation in the country, the prospects for maize and millet harvest are unfavourable. Cassava is reportedly performing better in rainfall-stressed parts of the country. Nearly 2 million farmers received emergency agricultural inputs assistance at the start of the season. Heavy rains during February to April caused flooding in riverbeds affecting field crops in south-eastern and central parts of the country. Flooding also caused serious damage to maize and bean crops in Huambo province and may necessitate emergency food assistance to some 290 000 people who suffered heavy losses.

With the improvement in security situation, large numbers of internally displaced persons (IDPs) and refugees have returned to their areas of origin. Although the vulnerability analysis being conducted by WFP and partners is yet to be concluded, initial indications suggest that there will be a reduction of around 50 percent in the number of people in need of food assistance from an earlier estimate of 500 000. Those in need are expected to be concentrated in central provinces and those border provinces that will receive large numbers of refugees returning to Angola.

### **BOTSWANA (19 May)**

Dry weather during the first half of the season has adversely affected this year's main cereal crops. In addition, prolonged heavy rains upstream of the Okavango River during March and April caused severe flooding downstream in Botswana. Nevertheless, prospects for 2004 harvest are considered near normal. The beef export industry is struggling to recover following droughts and outbreak of foot and mouth disease twice in the last three years. However, pasture conditions have improved in recent months. The 2003 cereal production, mainly sorghum, was sharply reduced from the year before due

to dry weather. However, domestic production normally covers less than 10 percent of the country's total cereal requirements, the rest coming from commercial imports.

#### **LESOTHO (19 May)**

Due to the delayed planting rains, harvesting this year is expected to be later than the normal March-April period. A joint FAO/WFP Crop and Food Supply Assessment Mission is currently in the country carrying out an assessment of food supply and demand for the current marketing year. On 11 February 2004 the Government declared a state of emergency on account of the prevailing drought and the worsening HIV/AIDS problem. The preliminary results of a mid-season assessment by FAO and WFP in February-March indicated that maize, wheat and sorghum production this year is expected to be only about 41 000 tonnes, down by more than half from already reduced harvest of 2003. Plantings were adversely affected by withdrawal of customary input subsidies for farmers this year. The Government appealed for an additional 57 000 tonnes of food aid to help feed 600 000 people until the 2005 harvest as part of an emergency measures package. Although scattered showers in February and March brought some temporary relief from the prolonged dryness, they did not change the overall crop situation significantly in the country. The food supply situation remains very tight due to below-average cereal production in 2003 and the total failure of winter crops.

#### **MAURITIUS (19 May)**

Domestic production of cereals amounts to less than 1 percent of the total cereal needs. Consequently, the country imports virtually its entire cereal consumption requirements commercially.

#### **MADAGASCAR (19 May)**

During this cyclone season Madagascar was hit by cyclone Gafilo in early March and cyclone Elita in January and again in February causing large-scale damage in the north-eastern part of the island. Latest Government assessment indicates that 774 000 people have been affected and over 300 000 hectares of farm land, covering vanilla, paddy and other crops, have been damaged. A joint FAO/WFP/Ministry of Agriculture assessment of the impact of cyclones on food security and food production is currently underway. In other parts of the country, heavy rains during February helped the paddy crop. UN Inter-Agency Consolidated Appeal for US\$8.7 million has been issued including FAO's agriculture sector component of US\$1.15 million and WFP's food assistance component of US\$5.5 million to help the victims of recent flooding. The southern parts of the island, on the other hand, have suffered from prolonged dry weather especially early in the season. Thus, the prospects for main season crops are uncertain. Preliminary reports from the EU-funded early warning system indicate that some 2 000 tonnes of food aid will be needed to assist some 74 000 people during the September 2004-April 2005 lean period.

#### **MALAWI (19 May)**

A vulnerability assessment by the national Vulnerability Assessment Committee (VAC) and a Crop and Food Supply Assessment Mission by the FAO and WFP completed their field work in mid-May and are finalizing their reports. The preliminary findings indicate that the harvest of maize, the country's staple food crop, will be around 1.7 million tonnes or about 15 percent below the previous year's about normal harvest. Delayed, erratic and generally inadequate rainfall especially in the southern half of the country was responsible for this decline. Good rainfall during February to April especially in the northern half helped most crops. Maize prices in most markets have slowed down their usual post-harvest decline and are even beginning to rise in certain markets. Mozambican maize was seen transported into southern Malawi indicating significant cross-border informal trade activity.

The VAC has identified the most affected Extension Planning Areas (EPAs) within various Livelihood Zones. No firm results are yet available. Distribution of maize stocks held centrally by the government food marketing agency, Agricultural Development and Marketing Corporation (ADMARC), was halted due to near complete exhaustion of its stocks. The National Food Reserve Agency (NFRA) currently holds about 7 000 tonnes of maize as part of its strategic grain reserve and has issued tenders to acquire additional 28 000 tonnes of maize, funded by the EU, locally and/or from neighbouring countries. ADMARC has now been mandated to operate as a commercial company buying and selling maize and other agricultural commodities for profit. Private traders interviewed by the mission are unsure of the Government's subsidization policies and are, therefore, taking a "wait and see" attitude before engaging in maize trading.

#### **MOZAMBIQUE (19 May)**

Harvesting of the 2003/04 main agricultural season crops is currently underway. Assessments by the national Vulnerability Assessment Committee (VAC) and a Crop and Food Supply Assessment Mission by FAO/WFP are being carried out. With substantial recovery in the south, early estimates point to an above-average national level production. Results should be finalized in June. The cropping season started almost a month late and has been characterized by dry spells up to mid-January. As a result, up to three replantings were necessary in the south of the country, while planting was delayed elsewhere. In March overflowing of several rivers in central provinces following heavy rains caused serious flood damage to crops. For example, about 600 hectares of cropland in the Dondo and Nhamatanda districts in Sofala province were reportedly submerged. However, emergency food assistance requirements are expected to be much lower than in the previous years primarily due to improved local food supplies.

#### **NAMIBIA (18 May)**

Harvesting of 2003/04 main season crops is underway. The season has been characterized by delayed and generally insufficient rains in most parts of the country resulting in unfavourable prospects for harvest. During March and April sustained heavy rains upstream caused the Okavango River to burst its banks, causing serious flood damage to crops in the Caprivi and Kavango provinces. Significant improvement in pasture and livestock conditions is reported following heavy rains in recent months. In November 2003, the Government issued an appeal for emergency agricultural assistance. According to WFP and UNICEF, 640 000 people, a third of the nation's population, will need food relief in the coming months because of the cumulative effects of adverse weather and HIV/AIDS. Donor support to the United Nations' appeal for US\$5.8 million to assist over 600 000 vulnerable people has not materialized. Consequently the Government has continued food distribution with its own resources.

#### **SOUTH AFRICA (18 May)**

The third estimate of total maize harvest of 2003/04 main agricultural season by the country's Crop Estimation Committee (CEC), has upgraded its previous estimate to a total of 7.9 million metric tonnes. This is still nearly 20 percent below the total harvest of the previous season primarily due to the effects of the worst drought in ten years in seven out of nine provinces. The drought is said to have affected as many as 15 million people. Maize plantings this season were down by about 18 percent compared to the year before. Production of white maize is forecast at 4.8 million tonnes compared to 6.6 million tonnes last year. This would translate into an exportable surplus of white maize in 2004/05 of about 1.6 million tonnes available to countries in the sub-region, while maintaining about 545 000 tonnes of South Africa's own desired level of stocks. It is also important to note that as of 1 March 2004, the SAFEX price of white maize was 38 percent higher than it was at the beginning of March 2003. According to some reports in early February, real maize prices in South Africa have

jumped by about half since 1 December and have more than doubled since the post-harvest low in April 2003. However, maize prices declined in early March with improved rains.

The winter wheat crop harvested in December 2003 is estimated at 1.43 million tonnes, almost 38 percent below the previous year's harvest.

#### **SWAZILAND\* (19 May)**

According to the preliminary findings of the FAO/WFP/Government Rapid Assessment Mission from 12 to 20 February, the rainfall pattern of past three years has continued this year with a substantially below average rainfall in the lowveld and the dry middleveld areas. This has resulted in lack of sufficient forage for livestock causing some significant numbers of livestock deaths, further impoverishing the community in the drier areas of the country. Although February rains brought some relief from the prolonged dryness, its effect on crop harvest is doubtful. The mission has estimated 2004 maize production at 64 to 86 000 tonnes, or 13 to 35 percent below the five year average production level. The HIV/AIDS pandemic in the country is causing high death rates among heads of families, often resulting in failure to carry out normal agricultural tasks necessary for food security. With a self-sufficiency rate for cereals of only 36 percent in 2003, food security is mostly dependent on the purchasing power of the population. A joint FAO/WFP Crop and Food Supply Assessment Mission is currently assessing the food supply situation and prospects for 2004/05. Preliminary findings of the Vulnerability Assessment Committee (VAC) indicate a food aid requirement of 20 000-25 000 tonnes during the coming 12 months.

#### **ZAMBIA (19 May)**

An early estimate of the 2004 main season maize production in Zambia is 1.4 million tonnes, about 21 percent up from the previous year's above average output of 1.2 million tonnes (Ministry of Agriculture and Cooperatives). Rainfall over much of the country has been favourable for the main-season crops planted in October-November 2003. According to the Zambian Meteorological Department, in general the cumulative rainfall has been above normal in the east and the north, normal in the centre but below normal in the south. More recently heavy rainfall upstream of Zambezi River caused severe flooding in Western and North-western Provinces. The Government encouraged increased plantings and fertilizer use through its extended input subsidy programme to help boost food production. With the improved production, Zambia could potentially export about 250 000 tonnes of maize to food deficit neighbouring countries.

#### **ZIMBABWE\* (19 May)**

Harvesting of the main season crops planted in November-December 2003 is underway. A joint FAO/WFP Crop and Food Supply Assessment Mission was in the country for part of the planned period. Based on the mission's visits to three main provinces, observations along the travel routes and interviews with informants at local level, the mission estimated that total food production this year would be even lower than last year's 980 000 tonnes. The overall food deficit (import requirement) could be over 1 million tonnes. Final estimates would be provided by FAO and WFP in the first half of June. The decline in production is attributed to delayed and erratic rainfall, shortages of quality seeds, the high local cost of fertilizer, shortages of draught animal power and tractors, a further decline in the utilization of large-scale commercial farms, and the impact of HIV/AIDS pandemic. At the beginning of the agricultural season in October very few farmers were able to plant maize due to insufficient and scattered showers. The ensuing dry spell destroyed many first plantings. Effectively, rains started throughout much of the country in late December-early January, pushing back maize and sorghum start-of-season in many areas.

In recent years, domestic cereal production has covered less than half of the country's domestic requirements. Escalating inflation, currently on the order of 600 percent per annum, is further eroding purchasing power, thus greatly limiting access to food for the most

vulnerable groups. WFP's monthly food distribution data under the current Emergency Operation (EMOP) shows that a total of 314 357 tonnes of food was distributed from July 2003 to April 2004, with a planned distribution of 10 000 tonnes for May-June. The number of beneficiaries peaked in March 2004 at 4.4 million.

## **NEAR EAST**

### **CYPRUS (1 May)**

The 2004 aggregate output of wheat and barley, for harvest from May, is forecast at 107 000 tonnes, 22 percent up on last year but about average. Cereal production normally covers less than one-third of total domestic requirements.

Imports of cereals in 2003/04 (May/April), mainly wheat and barley, are estimated at about 645 000 tonnes, similar to the previous year.

### **IRAN, ISLAMIC REPUBLIC OF (10 May)**

Main current agricultural activities include harvesting of wheat and planting of the paddy crop due for harvest from August. The 2004 wheat crop is expected to be another good year and will reach 14 million tonnes, reflecting the increased area under cultivation, due to guaranteed prices by the government, and favourable weather condition. This good harvest will keep wheat imports in the new marketing season at around the same levels as in 2003/04. The 2004 paddy production is tentatively forecast at 3.33 million tonnes, unchanged from the previous year, leaving the food import requirement for 2004/05 at 500 000 tonnes.

### **IRAQ\* (1 May)**

**Prospects for the 2004 winter grain crop, for harvest from May, are uncertain. Cereal production may be affected by serious shortages of fertilizers and other agricultural inputs. The 2003 total cereal production has been estimated at 4.12 million tonnes (including rice in milled terms), about 22 percent above the previous year's output.**

**Despite the fact that all Iraqis continue to receive their monthly food ration from the Public Distribution System (PDS), the food security situation in the country remains extremely fragile. Recent events indicate a deterioration of security conditions which led to an increase in humanitarian needs in crisis areas. UN agencies are monitoring the evolution of the situation and providing assistance as needed. Reports from all 18 governorates indicate that food distribution to the entire population under the PDS for April is complete. However, in Falluja, one of the most unstable areas, distribution started only early May.**

### **ISRAEL (1 May)**

Harvesting of the 2004 wheat crop is underway and the output is forecast at about 185 000 tonnes. Domestic production of wheat in normal years covers less than one-fifth of the country's total requirement, while the rest is commercially imported. In 2003 wheat production – estimated at 187 000 tonnes – was slightly higher than in the previous year. Imports of cereals in 2003/04 (July/June) are forecast at about 3.0 million tonnes.

### **JORDAN (1 May)**

Aggregate output of wheat and barley in 2004 is forecast to be drastically reduced compared to last year's good crop due to below-normal rainfall and high temperatures. Domestic cereal production normally meets only a small proportion of consumption requirements, the rest being covered by imports. Imports of wheat in 2003/04 (July/June) are forecast at 840 000 tonnes, similar to last year. Coarse grain imports are forecast at 900 000 tonnes, 12 percent higher than last year.

#### LEBANON (1 May)

The 2004 wheat and barley crops, now being harvested, are expected to be about 125 000 tonnes, slightly below last year. The country depends heavily on imports (more than 80 percent) to meet demand for cereals.

Imports of cereals - mainly wheat - in 2003/04 (July/June) are forecast at some 780 000 tonnes, slightly above the previous year.

#### SAUDI ARABIA (1 May)

The 2003/04 wheat crop, about to be harvested, is forecast at about 1.6 million tonnes compared to last year's 2 million tonnes. Local barley production has virtually ceased as farmers did not find the Government Purchase Price (GPP) of US\$267.67/tonne attractive enough. The decision to stop local barley production subsidy took effect in this cropping season.

Imports of coarse grains (mainly barley and maize) in 2003/04 (July/June) are forecast at 7.2 million tonnes, slightly higher than the previous year.

#### SYRIA (1 May)

The output of wheat in 2004, now being harvested, is forecast at 4.7 million tonnes, about 4 percent below last year's bumper crop but 16 percent above the average for the previous five years. Barley harvest is also estimated at an above average 1.1 million tonnes.

Imports of wheat and rice in 2003/04 (July/June) are forecast at a total of 300 000 tonnes whilst barley imports are forecast at 300 000 tonnes.

#### TURKEY (1 May)

Output of the 2004 wheat crop is provisionally estimated at 20 million tonnes, almost similar to the previous year. Production of wheat in 2003, estimated at 19.5 million tonnes, was slightly below the average of the previous five years. Output of coarse grains (mostly barley and maize) was slightly higher at 11.0 million tonnes. Paddy production in 2003 is estimated at about 370 000 tonnes slightly above the previous year and the average.

Wheat imports in 2003/04 (July/June) are forecast at 800 000 tonnes compared with 1 million tonnes for the previous year. Maize imports are forecast at about 1 million tonnes, similar to last year.

#### YEMEN (1 May)

Planting of the main sorghum and millet crops, to be harvested towards the end of the year, has started. The output from the 2003 sorghum crop is estimated at some 213 000 tonnes, about 26 percent lower than the previous year and nearly 44 percent below the average of the previous five years. Output from the wheat crop also decreased to 104 000 tonnes. Maize production estimated at 33 000 tonnes was 19 percent and 34 percent less than in 2002 and the average respectively. Imports of cereals in 2004, mainly wheat, are estimated at about 2.7 million tonnes, an increase of some 7 percent compared with 2003.

## **ASIA**

### **AFGHANISTAN\* (12 May)**

Latest reports and satellite imagery indicate that temperatures during spring have been relatively high and precipitation below average. The rainfed cereals, which depend on spring precipitation and on average accounted for over 20 percent of aggregate cereals, may have been affected somewhat. In addition, early snowmelt following unusually variable temperatures may reduce water availability during the critical summer months. Aggregate area planted with cereals has somewhat declined compared with the record area planted last year. Given the volatile nature of weather conditions in Afghanistan, it is too early to predict cereal harvest at this stage. However, indications are that aggregate cereal harvest will be somewhat lower than last year's record harvest of about 5.4 million tonnes.

**Access to food for many vulnerable households has remained difficult, and targeted food assistance continues to be necessary for a large number of households. The current Protracted Relief and Recovery Operation (PRRO), which began in April 2003 is expected to come to an end by March 2005 and will target some 9.24 million people with a total of 619 000 tonnes of food aid. This PRRO includes three main components, Food for Work, Food for Education and targeting vulnerable households including IDPS and returning refugees.**

### **ARMENIA (12 May)**

Favourable weather conditions and access to adequate farm inputs have been reported, which have resulted in satisfactory crop conditions throughout the country. Aggregate area planted with grains is estimated at about 189 000 hectares, which is some 2 000 hectares above the five year average planted area. Provided that favourable weather conditions prevail, particularly during the ensuing summer, aggregate cereal harvest is forecast at about 397 000 tonnes, including 320 000 tonnes of wheat and 62 000 tonnes of barley. Total cereal import requirement for the 2004/05 marketing year is forecast at about 136 000 tonnes, including 50 000 tonnes in food aid.

### **AZERBAIJAN (11 May)**

Latest reports indicate that winter and spring crops are in satisfactory conditions and generally favourable weather conditions have prevailed over most of the country. Aggregate area planted with cereals is estimated at about 815 000 hectares, which is similar to the area planted in the past couple of years but significantly above the five year average. The government has been attempting to increase domestic cereal production by converting land to cereals at the expense of other crops, in particular cotton. Provided that favourable weather conditions prevail over the summer, aggregate cereal harvest is forecast at just over 2 million tonnes, which is similar to the harvest in 2003/04 marketing year. Despite a good harvest, the country continues to rely on cereal import to meet domestic demand. Aggregate cereal import requirement for the 2004/05 marketing year is forecast at about 412 000 tonnes of mainly wheat.

### **BANGLADESH (7 May)**

In late April, storms and floods in north-eastern Bangladesh killed 90 people and injured more than 3 000, displaced about 100 000. Some 500 000 acres of rice crops almost ready for harvest were damaged by floods. Government has distributed more than 130 tonnes of rice to the affected people.

Harvesting is completed for the 2004 winter wheat crop planted in November 2003. The output of this season is estimated at 1.3 million tonnes, down from 1.5 million tonnes last year, due to area shifted to potato, boro, maize, and mustard which are more profitable. The government has decided to take proactive steps from next season to increase production of wheat by increasing high-yielding seeds and mechanization, and by improving crop management.

Total paddy production in 2003 is officially estimated at record 39.9 million tonnes, 5.6 percent higher than the previous year and 13 percent more than the average for the previous five years. Harvesting of 2004 Boro rice crop, accounting for almost 45 percent of total annual rice production and planted in November through January started in April and the yield was estimated lower due to low rainfall from November to March.

The agriculture sector is a key to economic growth, accounting for around 30 percent of gross domestic product. Bangladesh will triple farm subsidies to more than US\$150 million in the next budget year starting 1 July from the present US\$50.83 million to boost production and maintain economic growth. The subsidies would be given for irrigation and seeds.

Due to a marked rise in cereal production, cereal imports, including food aid, are estimated to decline from 3.5 million tonnes in 2002/03 to 2.7 million tonnes in 2003/04, and are forecast down to 2.4 million tonnes in 2004/05.

#### CAMBODIA (5 May)

The main current agricultural activities include the harvesting of dry season paddy crops, estimated at 0.873 million tonnes, the preparation of land for wet season for maize, cassava, sweet potatoes, vegetables and other secondary crops. The total 2003/04 marketing year paddy production, including 3.84 million tonnes of the main harvest from November 2003, is officially estimated at 4.71 million tonnes, a record harvest in the country's history, reflecting favourable weather conditions, improved irrigation system, and reasonable profit for paddy producers. About one million tonnes of rice is available for export. Maize production in 2003 is estimated at 190 000 tonnes, a big increase compared to the previous year's 149 000 tonnes.

#### CHINA (10 May)

Total sown area for cereals in Mainland China was reduced by more than 15 percent, or 14 million hectares, from 1998 to 2003. As a result, the output of cereals declined by 17 percent, or some 79 million tonnes. The government is implementing several new policies in order to encourage farmers to increase grain production. The major policies include direct subsidies to farmers (about US\$1.2 billion, or about US\$20 per hectare), phasing-out of agricultural tax in 1-5 years (1-2 years in Northeast region), minimum grain purchasing prices, and strictly protecting farmland.

The 2004 winter wheat, accounting for some 85-90 percent of total annual wheat production, is in the late development stage and under favourable growing conditions. Planting of spring wheat is almost completed. Aggregate 2004 wheat production is tentatively estimated at 83 million tonnes, some 3.4 percent lower than in 2003, reflecting the lowest area since 1983.

Planting of 2004 maize is completed in most parts of China. Some discarded lands are reported to be used for maize production this season and some areas which are traditionally used for small cereal crops have been shifted to maize production as a result of government grain policies. However, the total planted area is expected to continue to decline this year, by 2 percent from the previous, due to strong prices of competing crops such as soybean and rice.

Planting of 2004 early double-crop rice was completed in April and planting of single-crop rice is underway. The aggregated rice area is expected to increase by some 4 percent from the previous area due to government support policies, especially minimum support prices (early indica 1 400 yuan/tonne, middle indica 1 440 yuan/tonne, and Japonica 1 500 yuan/tonne). Land productivity is also expected to increase due to more high-yield hybrid rice area and more application of fertilizer. The weather in most of growing regions is favourable for the early development of paddy rice.

Rice production in Taiwan is estimated to fall by 12 percent to a historical low of slightly more than 1 million tonnes this season due to area reduction and an ongoing drought in the south of the country. Taiwan planned to cut rice production from 2001 levels by 10 percent in 2002, by 20

percent in 2003 and 22 percent in 2004 to allow imported rice based on WTO requirement. Wheat production is negligible and coarse grain production is very low.

#### GEORGIA (26 May)

Spring planting is complete in most of the country and aggregate area planted with cereals is now estimated at 425 000 hectares, which is some 48 000 hectares up on the five year average. Precipitation and soil moisture in much of the country has been reported above average, which have created ideal conditions for crop growth. The harvest will depend on late spring and early summer precipitation and temperatures, which are the main causes of lower yields and sometimes crop failure in the country. Provided that favourable weather conditions prevail, aggregate cereal harvest is forecast at 711 000 tonnes, slightly down on last year's good crop but about 57 000 tonnes above the five year average harvest. Despite a good harvest Georgia remains a net cereal importing country, with aggregate cereal import requirement estimated at about 485 000 tonnes, including 125 000 tonnes of food aid. A recent household survey, conducted by WFP, shows that food prices have jumped by about 60 percent above normal, following poor harvests in the Russian Federation and the Ukraine as well as crackdown on cross border unofficial trade.

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

#### INDIA (5 May)

Harvesting of the 2004 wheat, planted in October/November 2003, is underway and land preparation for sowing of the coarse grain and Kharif rice, oilseeds and groundnuts crops, for harvest from September, has begun. The 2004 wheat crop is revised down to 73 million tonnes from 75 million tonnes due to unusually high temperatures and inadequate precipitation during the maturation stage. However this wheat production is still some 12 percent above the harvest of last year and 3 percent over the average of the previous five years, due to larger area cultivated.

Following a government directive, the Food Corporation of India has discontinued subsidies for export since August 2003 and the private sector is allowed to purchase wheat for export directly from the farmers. Grain merchants can source their requirements from the open market. Exports of wheat during 2003/04 marketing year (April/March) reached around 5.1 million tonnes but are expected to be lower at 2 million tonnes in 2004/05, reflecting low stocks and expected lower government procurement.

Due to good monsoon rains, production of Rabi and Kharif paddy crops in 2003 is officially estimated at 136 million tonnes, some 23 percent higher compared with the drought reduced output in 2002. The export in 2003/04 is estimated at 2.5 million tonnes, significantly lower than in the previous year of 4.4 million tonnes, as a result of reduced stocks. Another good crop is expected for 2004 based on the larger area and expected good rainfalls.

India achieved a record maize output in 2003 of 14.7 million tonnes, 32.3 percent higher than the drought reduced output in 2002 and 25.3 percent above the average of the previous five years. This was due to a combination of a larger area and favourable rainfall conditions. Production in 2004 is tentatively forecast at 15 million tonnes.

#### INDONESIA (10 May)

Harvesting of the main season crop has been completed (March-April) and the outlook for paddy production is favourable due to overall good growing conditions. Planting of the secondary paddy crop is underway. The 2004 paddy production is officially forecast to be up some 2 percent from the previous year to 53.10 million tonnes. The Government has banned importation of rice until end of June 2004.

The 2004 maize output, harvested in March, is estimated at 11.4 million tonnes, some 5 percent up from the previous year and 16.6 percent above the average of the previous 5 years, as a result of better than average precipitation and increased planted area. Reflecting the higher production and rising world maize price, the 2004/05 maize import is expected to be lower (some 1 million tonnes) and export to be higher (400 000 tonnes) from the previous year.

Wheat consumption in Indonesia is completely met by imports which are forecast at 4.2 million tonnes in 2004/05, marginally up from the previous year.

Indonesia suffered a number of disasters during the last several months. Following devastating floods in Jambi, North Sumatra, where 25 000 people were forced to leave their homes, the Federation successfully launched an emergency appeal in early January and 170 percent was funded. The Federation and Indonesian Red Cross-Palang Merah Indonesia (PMI) also raised sufficient funds locally and internationally to provide support to the affected population.

#### JAPAN (10 May)

Japan produces only about one-quarter of its domestic cereal requirement. Rice, which accounts for 90 percent of cereal production, is planted from mid-May to July for harvest in September-November. The 2004 paddy production is forecast at some 10.71 million tonnes, 10 percent above last year's weather-affected production, but 3.5 percent below the average of the previous five years. Wheat is grown as a winter crop, being planted in October/November and harvested in June/July. The early forecast of 2004 wheat production is 825 000 tonnes. Some 0.2 million tonnes of coarse grain, mainly barley, are also grown annually.

The import of cereals in 2003/04 (July/June) is estimated at 26.9 million tonnes (coarse of grains 20.5 million tonnes, wheat 5.8 million tonnes, and rice 0.7 million tonnes). The 2004 government rice production target is 8.54 million tonnes, unchanged from 2003.

#### KAZAKHSTAN (11 May)

Latest official reports indicate that spring cereals have been planted on about 13.4 million hectares, which is similar to the areas planted during the past couple of years. Late frost in April in the Northern grain belt of the country has reportedly damaged significant cereal areas and may cause lower than expected yields. Provided that favourable weather conditions prevail, aggregate cereal harvest is tentatively forecast at about 14.4 million tonnes, which is down by 1.5 million tonnes on 2002/03 and 451 000 tonnes down on 2003/04 marketing year.

Aggregate cereal export for 2004/05 marketing year is forecast at about 5.8 million tonnes compared with nearly 6.5 million tonnes during the 2003/04 marketing year. Wheat is, by far, the most important crop in the country both in production and export.

#### KOREA, DEMOCRATIC PEOPLE'S REPUBLIC OF\* (4 May)

**Harvesting of the 2003/04 winter wheat crop commences in June, same as spring barley and early potatoes. The area for this crop planted in September-October 2003 is estimated at 69 000 hectares compared to 58 000 hectares in the previous year. Winter wheat output is provisionally estimated at 161 000 tonnes, against 145 000 tonnes in 2002/03. One factor for this increase is the expanded Double Cropping Programme, with the support of FAO which provided a total of 5 894 tonnes of fertilizer (urea), with some 3 870 tonnes more yet to arrive.**

**Paddy was planted in nurseries at the end of March and beginning of April and will be transplanted from late May into June. There were big consignments of fertiliser: 200 000 tonnes from South Korea and 47 000 tonnes from the EU.**

**With the recent arrival of maize and wheat, all but 600 000 core beneficiaries received their WFP cereal rations in April. Cereal allocations for FFW projects during the spring season**

**have had to be reduced from a planned 32 000 to 8 300 tonnes. New pledges of about 123 000 tonnes of mixed commodities (mostly cereals) are urgently required to cover needs over the next six months.**

**On Thursday 22 April a train explosion at a railway station in Ryongchon (North Pyongan province) near the Chinese border killed 161 people and caused extensive damage to property.**

#### KOREA, REPUBLIC OF (10 May)

The rice crop harvested in September-November 2003 was the lowest in a decade at 4.45 million tonnes, as a result of prolonged rains and typhoon. However, the country still can maintain self-sufficiency in rice.

Based on the WTO's 1994 Uruguay Round, South Korea has had the safeguarding system of minimum market access (MMA) for 10 years and has been importing rice equal to only 1 to 4 percent of annual domestic consumption at a normal tariff, and has been barring additional imports through an exorbitant tariff. As a result, the gap between South Korea's rice prices and those of the exporting country is as high as 380 percent to 400 percent. The government has to complete negotiations on the nation's rice market with WTO member states by the end of this year. The opening up of the market is expected to have a significantly impact to this world's 12<sup>th</sup> largest rice producing country's production and trade.

South Korea is one of the world's largest importers of wheat and maize. The imports in 2003/04 (October/September) are forecast at 3.1 million tonnes for wheat and 9.5 million tonnes for maize.

#### KYRGYZ REPUBLIC (12 May)

Latest reports indicate that cereal crops are in satisfactory conditions and aggregate area planted with cereals is estimated at about 610 000 hectares, up by about 25 000 hectares on 2003. Official forecasts put aggregate cereal harvest at about 1.7 million tonnes, which is some 47 000 tonnes above the 2003 harvest. Aggregate cereal import requirement for the 2004/05 marketing year is estimated at about 122 000 tonnes of mainly food quality wheat.

#### LAO PEOPLE'S DEMOCRATIC REPUBLIC (10 May)

Harvesting of the dry season irrigated rice crop, planted in December/January, was completed in April. Rice area under high yielding varieties has become increasingly important in the last several years. The 2003/04 marketing year paddy production has been officially estimated at a record 2.5 million tonnes, compared to 2.4 million tonnes in the previous year, reflecting expanded rice area and use of high yielding varieties. Although this production virtually covers national consumption requirements, the poorer sections of the population, predominantly in upland areas, have inadequate access to rice and are chronically food insecure and in need of assistance.

#### MALAYSIA (10 May)

Harvesting of the main paddy crop, planted from August to November last year, finished in April. Planting of the irrigated secondary paddy crop, normally accounting for some 40 percent of total production, has been completed under favourable weather conditions. Aggregate paddy production in 2003 is estimated at a record 2.1 million tonnes. The 2004 paddy output could reach the same high level as last year, reflecting a slight area increase and assuming normal weather conditions for the second crop. Imports in 2004 are forecast at 545 000 tonnes to meet some 27 percent of domestic consumption. Some 1.35 million tonnes of wheat and 2.50 million tonnes of maize imports are forecast for 2003/04 (July/June).

#### **MONGOLIA\* (10 May)**

Planting of the 2004 wheat crop is about to start and some 40 000 hectares of wheat area are expected to be taken out from the previous year as some of the land previously cultivated by farming companies is being reallocated under the 2002 land laws. As a result, the 2004 wheat output is forecast at 148 000 tonnes, some 22 000 tonnes below that in 2003. This production covers only some 36 percent of country's wheat requirement and the shortfall is expected to be made by imports and aid.

From January to April 2004, Mongolia has received 24 500 tonnes of wheat aid from the United States, US\$85 000 of wheat aid provide by Japan and 9 000 tonnes of rice from Taiwan. The donated grains are sold to approved buyers at market prices and the income derived from the sales will be used to support agricultural development projects.

From 1999 to 2002, the number of families owning livestock declined, as a result of severe winters that cut herd numbers by some 10 percent. However, the condition was better in late 2003 and the early 2004 due to better weather with temperatures above normal in most parts of the country. The survival rate for new-born stock was high and fewer adult animals were lost. Livestock also benefited from better supply of fodder and hay which was produced in the summer of 2003.

**An outbreak of foot-and-mouth disease was reported in Dornogov, Dundgov and Sukhbaatar aimags in the south of Mongolia in February, March and April.**

#### **MYANMAR (7 May)**

The 2003 main monsoon crop, normally accounting for some 85 percent of annual rice production and harvested in November 2003, registered a decade record of 24.64 million tonnes, some 8.2 percent above the level of previous year and 19.4 percent higher than the average of the previous five years, following favourable weather and government policy.

Harvesting of the 2003/04 dry season rice crop planted in October/November 2003 is underway. This crop normally accounts for about 15 percent of annual production. Production this season is estimated to be below normal due to dry weather conditions during the season.

Reflecting steady increases in paddy production in the last several years, the cereal supply situation is satisfactory. Rice export was banned from 1 January to 31 May by government in order to lower domestic rice price.

In late April, a strong storm damaged 150 houses in Northern Shan State with 53 of them completely destroyed. Donors have pledged US\$1.89 million out of the total requirement of US\$3.7 million appealed by WFP.

#### **NEPAL (10 May)**

Harvesting of 2003/04 wheat crop planted in November/December 2003 was completed in April. Information from the Ministry of Agriculture suggests that weather conditions during maturation stage were favourable, but information collected by WFP from some hill and mountain districts suggests that winter crops were adversely affected by erratic rainfall. Preliminary estimates show overall production at 1.25 million tonnes, virtually unchanged from the previous year. The rice crop harvested in November/December 2003 is estimated at 2.76 million tonnes, an increase of 7.8 percent on last year. Production of coarse grain (maize and millet) in 2004 is estimated at 1.69 million tonnes, marginally higher than last year.

While domestic production by and large covers national cereal requirements, 38 percent of the country's population of 23 million are estimated to live below the poverty line. A number of agencies,

including WFP, support the most vulnerable groups. However, due to the deteriorating security situation in the country, it is becoming increasingly difficult to operate effectively in the rural areas. Three major western donors (United Kingdom, Holland and Germany) recently suspended some projects in western Nepal due to conflict and insecurity.

#### PAKISTAN (5 May)

Harvesting of the 2004 wheat crop planted in October-December 2003 is underway and the output is estimated at 20 million tonnes, some 3.9 percent up from last year's level and 4.8 percent above the average of the previous five years, reflecting widespread rains during the growing stages. Despite the larger wheat crop, the country is expected to need 0.5 million tonnes of wheat imports due to low stock.

Planting of 2004 paddy has just started and will continue to July and output is forecast at 7.6 million tonnes, some 4 percent above the previous year, reflecting expected improvement in yields and expanded planting of IRRI rice. Pakistan is a major exporter of rice and the 2004/05 export volume is forecast at 2.2 million tonnes.

Current activities also include the planting of maize. Total 2004 coarse grain output is forecast at 2.2 million tonnes. 200 000 tonnes of coarse grain imports are projected for 2004/05.

#### PHILIPPINES (10 May)

Harvesting of the secondary rice and maize crops is underway. Despite the lack of rainfall and pest infestation in some areas of the country, paddy and corn harvest is expected to be higher than in 2003. Paddy output is officially estimated to increase by 3.5 percent due to larger area and higher yield from last year. Maize production is estimated to increase by 173 000 tonnes to 1.526 million tonnes in the first quarter of 2004 due to both increased area and improvement in yield, as a result of the attractive price and the hybrid corn technology adoption. The Philippines aggregate paddy production in 2004 is estimated at 14.6 million tonnes and maize at 5.6 million tonnes.

Wheat is not produced in the country, and an estimated 3.2 million tonnes of imports are needed to meet domestic consumption in 2004/05.

#### SRI LANKA (5 May)

**Harvesting of *Maha* season rice, some 60 percent of total rice production, is complete and planting of *Yala* season rice is underway. Much below normal rainfall during *Maha* season from September 2003 to March 2004 caused a reduction in rice production, especially in the North-Central districts.**

**Based on the recent FAO/WFP Crop, Food Supply and Nutrition Assessment Mission to Sri Lanka, paddy production for *Maha* season declined by 77.5 percent in Kurunegala, 37.0 percent in Anuradhapura, and 63.3 percent in Puttalam compared to the previous year, due to the failure of the rains. Nationally, the decrease in paddy production in *Maha* season was 7.2 percent below the previous five-year average and 13.8 percent compared to the previous year. The 2004 rice production in *Yala* season may also be severely affected based on the water availability in tanks. Rice import requirements for 2004/05 have been estimated at 411 730 tonnes. With commercial imports estimated at 300 000 tonnes and anticipated food aid at 27 750 tonnes, there remains an uncovered deficit of 83 980 tonnes.**

**A total of 67 398 farming families in Kurunegala, Anuradhapura and Puttalam were estimated to be the most seriously affected and in need of food assistance. In addition, 7 100 families in Monaragala, Hambantota and other areas, along with some 3 370 landless families have been seriously affected by the drought. Most of the drought-affected families have also been the most vulnerable to food insecurity over the past several years.**

#### TAJIKISTAN (11 May)

Latest reports indicate that precipitation during spring has been erratic and temperatures above normal during much of spring. Rainfed cereals may fail if weather conditions do not improve during the remainder of spring and early summer. However, a high proportion of cereal crops are irrigated and the forthcoming harvest depends on water levels in the Oxus and Syr rivers. Provided that favourable weather conditions prevail and the water levels are sufficient in the mentioned rivers, aggregate cereal harvest is tentatively forecast at about 700 000 tonnes. This total is some 100 000 tonnes down on the bumper harvest of 2003/04 marketing year but about 196 000 tonnes up on the five year average production levels. Tajikistan requires just over a million tonnes of cereals, mainly wheat, to meet domestic consumption. Cereal import requirement for the 2004/05 marketing year is forecast at about 326 000 tonnes, including 103 000 tonnes in food aid.

#### THAILAND (5 May)

Planting of the 2004 main season rice crops, normally accounting for some 75 percent of total paddy production, and harvesting of the second season paddy crop will start soon. Current high rice prices will encourage farmers to put more acreage under paddy or grow a third crop. However, paddy production is at high risk from current drought. Farms and cities are facing a severe shortage of water as reservoirs run dangerously low due to low rainfall in the last several months.

The 2003 paddy production is estimated at a record high due to favourable weather. Thailand is the world's largest rice exporter and shipped a record of around 7.6 million tonnes of rice in 2003 and expects to export around 8.5 million tonnes in 2004.

The country produced some 4.3 million tonnes of maize in 2003. Domestic maize prices rose to a 20-year high of 7.50 baht a kg last week due to tightening supply resulting from a high volume of exports and recovery of poultry production. The Government has removed the usual 20 percent tariff for up to 500 000 tonnes of maize to be imported by mid-July to alleviate surging corn prices in the domestic market.

#### TIMOR-LESTE, DEMOCRATIC REPUBLIC OF (3 May)

Maize and rice are the main staples of the country, but cassava and sweet potatoes constitute an important part of the diet, especially in drought years. Harvesting of maize for the main season planted in November was completed in late February/March/April. Harvesting of wet season rice planted in December/January will start in late May in the northern areas and in August in southern areas. The overall agricultural performance in 2004 main season is expected to be good, reflecting favourable weather. The onset of the rain in November was considered normal. However, most areas in January/February experienced insignificant rainfall. The drought like situation improved in all areas in late February and became normal in March. The major crop outputs are estimated to increase significantly from drought-affected last year, with maize by 31 percent, rice by 8 percent, and cassava by 27 percent.

Following a joint WFP/FAO/Donor Needs assessment, WFP has initiated an emergency food aid operation, responding to the needs of approximately 110 000 drought- and flood-affected victims. Under the EMOP, which commenced in December 2003, WFP is providing 7 000 metric tonnes of targeted food assistance. The average monthly food distribution is about 1 350 tonnes and the EMOP will terminate in May 2004. Complementary to WFP food assistance, FAO provided 105 tonnes maize seeds to 10 000 households and 36 tonnes rice seeds for 1 320 farmers. In addition, FAO provided fertilizer to 2 500 rice or maize farmers and 2 400 pieces of hand-tools to 1 200 farmers.

#### TURKMENISTAN (12 May)

Latest official reports indicate that cereal crops are in satisfactory condition following favourable weather throughout winter and spring. Aggregate area planted with cereals is estimated at just over

1 million hectares, which is similar to areas planted in 2003. Official forecasts point to a record cereal harvest of 2.79 million tonnes, which is up by more than 100 000 tonnes on last year's bumper crop. Turkmenistan has been attempting to achieve cereal self-sufficiency by expanding area planted with cereal and improving yields. The government has also been building up cereal stocks.

#### UZBEKISTAN (12 May)

Generally favourable weather conditions and sustained efforts by the government to increase cereal production may result in the repeat of last year's record crop. Cereal crops have been planted on 1.5 million hectares, mainly winter cereals. The government and other analysts in the region predict that Uzbekistan will be able to match last year's record cereal harvest of more than 5.5 million tonnes. The government, for the first time since independence, relaxed restrictions on cereal exports last year. During 2003/04 marketing year 160 000 tonnes of wheat was exported to neighbouring countries and a forecast of about 500 000 tonnes of wheat will be exported during the 2004/05 marketing year. Only as recently as 2002/03 Uzbekistan was a net cereal importer.

#### VIET NAM (9 May)

Prolonged drought continues in Mekong Delta province, while heavy rains and storms occurred in the northern and northern central regions. In An Giang province, over 22 000 hectares of crops are affected by the dry weather. Meanwhile, farmers in highland areas in Ninh Thuan province plan to shift 1 410 hectares of rice into crops like maize, peas and grass for animal husbandry. Over 10 000 people in Thoi Binh district in the southernmost province of Ca Mau are severely suffering from a shortage of water due to the dry weather. In the northern and northern central regions, heavy rains and storms occurred on 23-24 May due to a strong north-eastern monsoon.

Paddy rice output in 2003 is officially estimated at 34.5 million tonnes, marginally up from 2002, despite reports of a prolonged drought in the Northern and Central regions. As the world's second largest rice exporter, Viet Nam exported some 3.9 million tonnes of rice in 2003 and is expected to increase to 4 million tonnes in 2004. Only in the first four months of 2004, Viet Nam was estimated to ship 1.68 million tonnes of rice, earning about US\$368.5 million.

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

#### COSTA RICA (12 May)

Heavy rains and flooding along the Caribbean coast and the North province have been reported during the first week of May. A large number of people were forced out of their homes. Planting of the 2004/05 first season cereal and bean crop just started with the arrival of the seasonal rains. The intended areas planted to paddy and white maize are anticipated to be similar to the previous year at 68 000 and 8 000 hectares, respectively. The country relies on imports for maize and wheat, and requirements in marketing year 2004/05 (July/June) are forecast at about 600 000 tonnes of maize and 205 000 tonnes of wheat.

#### CUBA (12 May)

**Harvesting of 2003/04 winter paddy crop and planting of the 2004 spring paddy crop are underway and production is provisionally forecast at 315 000 tonnes, slightly above the 295 000 tonnes of the previous year. About 600 000 tonnes of rice will be required as imports in year 2004 (January/December). The harvest of 2003/04 sugar cane crop is virtually completed and output is expected at 2.3 million tonnes, below the government's expectations of 2.6 million tonnes. This result is mainly due to lack of spare parts and fuel for machinery and transportation and to a drought that at the end of April significantly reduced the amount**

**of sugar cane available for milling in the eastern provinces. Harvest of 2003/04 coffee crop was completed at the beginning of April and output is estimated at low 220 000 60-kg bags, the lowest production in the last 50 years.**

#### **DOMINICAN REPUBLIC (26 May)**

At the end of May, torrential rains and flooding caused landslides, loss of lives and displacement of about 4 000 people in the Jimani region, near the border with Haiti. Although an evaluation is not yet available, it is expected that the flooding may cause extensive damage to crops and livestock. Harvesting of the 2004 main paddy crop and planting of 2004/05 first season coarse grains have started under normal weather conditions. Official forecasts indicate that paddy output for 2004 would be about 730 000 tonnes, higher than the last five years' average and sufficient to cover the domestic demand. Wheat imports in marketing year 2004/05 (July/June) are expected to decrease from 325 000 tonnes to 300 000 tonnes due to the high international prices and the weakness of the local currency. Maize imports in marketing year 2004/05 (July/June) are expected at the average level of 700 000 tonnes.

#### **EL SALVADOR\* (12 May)**

Planting of the important 2004/05 first season maize, paddy and bean crops has started with the arrival of the first rains from the beginning of May. Early official forecast indicates that the area planted with cereal and bean crops will be similar to the previous year. Area planted to sorghum is expected to increase from 88 000 hectares to 95 000 hectares due to the implementation of a scheme of guaranteed prices.

**The important coffee sector continues to be affected by low international prices, with negative impact on rural economy systems and nutritional situation. Food assistance continues to be delivered by the international community, targeting in particular children living in the rural and urban areas of the country's most food insecure departments like Ahuachapán, Chalatenango, Cabañas and Morazán.**

#### **GUATEMALA\* (12 May)**

Torrential rains damaged houses and infrastructure in the province of Huehuetenango at the beginning of April. Rains are forecast to be above normal in most of the country for the period May to July. Planting of the 2004/05 first season cereal and bean crops started with the arrival of the first rains at the end of April. Weather forecasts are favourable and cereal and bean production is expected to be similar to last five-year average. Wheat import requirements in marketing year 2004/05 (July/June) are forecast at about 550 000 tonnes, similar to the previous year. Maize imports are anticipated to increase from previous year's 620 000 tonnes to 660 000 tonnes.

**In coordination with the recently launched governmental programme "Anti-Hunger Front", food assistance continues to be provided by the international community to the municipalities that are most vulnerable to food insecurity.**

#### **HAITI (26 May)**

**At the end of May, torrential rainstorms caused landslides, flooding and loss of human lives in the town of Fonds Verettes, in the south-east region on the border with the Dominican Republic. An evaluation of the damages on crops and livestock is not yet available.**

**The security situation is still precarious, particularly in some areas of the North where various armed groups are still present. Despite this situation, the international community has resumed the activities of delivering food assistance practically in the whole country by the end of March. The current socio-political crisis has occurred at a critical time within the season for agricultural activities. Most lowland cereal and bean crops are planted in late March and early April and, due to low access to markets, farmers had severe problems in**

procuring seeds, tools and fertilizer for the planting of the 2004 spring season crops. Due to these factors, it is expected that plantings of lowland cereals to be harvested from August will be reduced. An increase in household food insecurity is reported in the North West Department, due to low purchasing power, drought and harvest losses. The National Coordination of Food Security reports a significant increase in prices of rice, maize, beans, sugar and vegetable oil in the principal markets from the end of year 2003.

From 11 to 25 March, a UN Multi-Agency Mission visited the country to obtain the necessary information on the ground for maintaining peace and delivering humanitarian assistance. The rehabilitation and reorganization of the operational capacity of the local institutions, almost completely destroyed by the conflict, is considered as crucial in order to properly manage medium to long-term development programmes.

#### **HONDURAS\* (12 May)**

Heavy rains and flooding along the Atlantic coast at the end of April caused some damages to housing. Planting of 2004/05 marketing year first season cereal and bean crops started with the arrival of the rainy season and will continue until July. Due to subsidies to agricultural inputs, 2004 paddy production is expected to remain at the same level of 19 000 as the previous year. Assuming normal weather conditions, 2004 maize production is tentatively forecast at 533 000 tonnes, slightly more than the previous year's good output. Wheat and maize import requirements in marketing year 2004/05 (July/June) are forecast at about 260 000 tonnes and 275 000 tonnes respectively.

**Food assistance is being provided by the international community, especially to families in municipalities with over 50 percent of chronic malnutrition.**

#### **MEXICO (12 May)**

Harvesting of the 2003/04 irrigated winter wheat crop is under way in the northwest main growing areas. Production is provisionally estimated to decline from 2.9 million tonnes in previous year to 2.5 million tonnes. This result is mainly due to inadequate water supplies in the main producing states of Sonora and Baja California, which resulted in a reduction in plantings of about 15 percent. Harvesting of the winter maize crop planted at the end of 2003 is underway and output is estimated at high 5.1 million tonnes. Aggregate 2003/04 marketing year maize output (summer and winter) is estimated at 20.3 million tonnes, about 5 percent higher than last year's production reflecting favourable weather conditions. Planting of the important 2004 spring/summer maize crop, to be harvested in fall/winter, has recently started in the states of Jalisco, México, Michoacán, Chiapas and Puebla. Planting of the 2004 summer sorghum crop is also under way in the states of Guanajuato and Michoacán and production prospects are good due to increased planted area and favourable weather conditions. Planting of 2004 paddy crop just started and production is expected to increase slightly due to the introduction of incentives and subsidies from the federal and state governments. Imports in marketing year 2003/04 (July/June) are expected to be about 6.0 million tonnes of maize, 3.5 million tonnes of wheat and 3.8 million tonnes of sorghum. Rice imports in marketing year 2003/04 are estimated at 600 000 tonnes.

#### **NICARAGUA\* (12 May)**

Planting of 2004/05 first season cereal and bean crops is about to start. First seasonal rains are expected by the end of May. Harvesting of the small 2003/04 third "apante" maize crop has been recently completed and the aggregate 2003/04 marketing year maize crop output is expected at a record level of 540 000 tonnes. Aggregate production of beans for year 2003/04 is also forecast to be a record at 210 000 tonnes, mainly due to high yields in the important third crop that has been recently harvested. Import requirements in marketing year 2004/05 (July/June) are forecast at 125 000 tonnes of wheat, 80 000 tonnes of maize and 110 000 tonnes of rice.

**Food assistance continues to be provided by the international community, particularly in the flood-prone areas of the Northern Atlantic Region and in the coffee crisis-affected municipality of Matagalpa.**

## **SOUTH AMERICA**

### **ARGENTINA (12 May)**

Harvesting of the 2003/04 maize crop, currently underway, has been frequently disrupted because of heavy rains. By the first week of May, 55 percent of plantings had been harvested compared to 73 percent by the same time the year before. Latest official forecast indicates decrease in maize output from 15 million tonnes in 2002/03 to about 12.4 million tonnes in 2003/04. The decline is mainly the consequence of reduced rains at sowing, resulting in reduced plantings in the main growing areas of Cordoba and La Pampa. In many cases, farmers preferred to plant soybean instead of maize. Planting of the 2004 wheat crop is about to start in the main producing central and southern areas of the country. Recent rains delayed soil preparation, but provided abundant soil moisture that will contribute to achieve a good germination. Unofficial sources forecast a slight increase in 2004/05 marketing year wheat production compared to the previous year's output that was affected by drought and reduction in plantings. The 2004 paddy crop was 90 percent harvested by the first week of May and output is expected to be about 990 000 tonnes, showing a significant recovery from the previous year's low result of 718 000 tonnes.

### **BOLIVIA (12 May)**

Harvesting of the summer wheat crop that was planted in October-November 2003 is underway in the main producing eastern Department of Santa Cruz and Chquisaca, while planting of the winter crop for harvesting from September is about to start. Harvesting of maize and paddy crops is also underway. Due to insufficient soil moisture in key producing areas of Santa Cruz, paddy yields are expected to be slightly lower than last five years average. Wheat imports in marketing year 2004/05 (July/June) are forecast to remain similar to the level of 250 000 tonnes imported in the previous year.

### **BRAZIL (12 May)**

Dry weather conditions are negatively affecting the winter "safrinha" maize crop to be harvested from June in southern states of Parana, São Paulo and Mato Grosso do Sul. Winter maize output is forecast at 9.7 million tonnes, with a significant decline from the previous year's bumper crop of 12.8 million tonnes. Drought is also affecting the production of 2004 first season (summer) maize crop that is being harvested in Centre-South states. Aggregate maize crop production for 2003/04 is forecast at about 42.6 million tonnes, about 10 percent less than the 2002/03 record crop. This decline is mainly due to diversion of land to soybeans and rice following more attractive prices and trade opportunities and to the less favourable weather conditions. Planting of winter wheat crop is under way in the states of Parana, São Paulo, Mato Grosso do Sul and Rio Grande do Sul. Early forecast points to a production of 4.5 million tonnes in 2004/05 marketing year. Harvesting of the paddy crop is about to be completed in Centre and South areas, while it is about to start in the North and North-East. A record paddy crop production of 12.9 million tonnes is forecast as a response to high domestic prices that motivated expansion of the area planted, increase in fertilizers use and adoption of new hybrid seeds.

### **CHILE (12 May)**

Planting of 2004/05 winter wheat crop is about to start and early official forecast indicates an increase in plantings from 416 000 hectares in previous year to 433 000 hectares. This is expected because of land diversion from oats, whose national prices are expected to fall as a consequence of the 2003/04 record oats crop. Import requirements for the marketing year 2004/05 (July/June) are

forecast at 1.1 million tonnes of maize (mostly yellow), 400 000 tonnes of wheat and 110 000 tonnes of rice.

#### COLOMBIA (12 May)

Normal to abundant rains, especially in the Caribbean coastal areas, have favoured plantings of 2004/05 first season cereal crops. Planting of 2004/05 first (main) maize crop is under way in the main growing departments of Córdoba and Bolívar and harvesting is due from September. Plantings of maize crops are tentatively forecast to increase slightly from the level reached in 2003 due to new areas entering into production mainly in the coffee region as a consequence of government incentives. Wheat imports in marketing year 2004 (January/December) are expected to remain stable at previous year's level of 1.2 million tonnes. Maize imports are expected to be similar to the volume of 2.21 million tonnes imported in marketing year 2003 (January/December). Food assistance from the international community is being provided in various parts of the country to the internally displaced population, victims of the civil strife affecting the nation.

#### ECUADOR (12 May)

**Dry weather from December to February affected the development of the winter paddy crop. Harvested area decreased from 250 000 hectares in the same season in 2003 to 210 000 hectares in 2004, due to both reduced plantings and planted area lost. As a result of some delay in the harvest, which started at the end of April, and reduced availability of rice in local markets, the price has increased significantly. The Ministry of Agriculture expects that the situation will normalise when the bulk of the production will be harvested at the end of May. Paddy production in year 2004 is forecast to be below an average 1.2 million tonnes. Harvesting of the 2004/05 marketing year first (main) season maize crop is about to start and prospects are below average as plantings were affected by dry weather, especially in the coastal main growing area of Los Rios. Reduced soil moisture is expected to have a negative impact also on the small summer second maize crop to be planted from May. Maize import requirements for marketing year 2004/05 (July/June) are expected to increase considerably from last year's 370 000 tonnes to some 450 000 tonnes. Wheat imports in marketing year 2004/05 (July/June) are forecast to increase from 475 000 tonnes in the previous year to some 500 000 tonnes.**

#### PARAGUAY (12 May)

Harvest of 2004 maize crop is underway and, due to the positive impact of favourable weather conditions on yields, an above-average output is expected of about 1 million tonnes. Plantings of 2004 winter wheat crop is about to start under normal weather conditions.

#### PERU (12 May)

**Plantings of paddy have been affected by insufficient rains in the northern highlands and by reduced reservoir levels (about 70 percent of their normal capacity) in the northern main growing areas of La Libertad, Lambayeque and Piura. Unofficial sources estimate 2004 paddy output at 1.8 million tonnes, with a reduction of about 20 percent compared to the record crop of the previous year. Although some recovery is expected during the year due to increasing plantings in the Andean department of San Martín, rice import requirements in marketing year 2004 are expected to increase significantly from 16 000 to 100 000 tonnes. The bulk of the plantings of yellow maize crop has been completed. Due to the negative impact of the drought, output (yellow and white maize) for the whole year 2004 is expected to be about 1.3 million tonnes, with a significant reduction from previous year's record crop of 1.5 million tonnes. Import requirements in marketing year 2004/05 (July/June) are estimated at 1.4 million tonnes of wheat and 800 000 tonnes of maize (mostly yellow for the feed industry).**

#### URUGUAY (12 May)

Harvesting of the important 2004 paddy crop is underway and production is provisionally estimated at a record level of 1.3 million tonnes. This result is due to the increase in the area planted in response to higher international prices and to the exceptional yields following favourable weather condition (about 6.9 kg/ha). Planting of the 2004 winter wheat and barley crops, for harvesting at the end of the year, is about to start with the arrival of first rains that are delayed in time. The area planted to wheat and barley is expected to increase by about 25 percent compared to previous year. Harvesting of the 2004 summer maize crop is under way and production is estimated at high 200 000 tonnes.

#### VENEZUELA (12 May)

The rainy season just started and heavy rains occurred in the western states of Zulia and Barinas. Harvest of the winter paddy crop is under way in the main growing states of Portuguesa and Guarico. Paddy production in 2004 is provisionally estimated at 750 000 tonnes, higher than the previous year's output, and above last five years average of 700 000 tonnes. This result is mainly due to the insufficient rains in the state of Portuguesa and to the low water levels in Guarico's reservoirs. As a result of high domestic prices, area under the summer paddy crop, to be planted from May to July, is expected to increase. Although maize is planted all year round, the bulk of plantings of the 2004/05 (mainly white) maize crop will take place in June. Plantings of maize are anticipated to be similar to last year 440 000 hectares. Wheat and maize imports in marketing year 2004/05 are expected to have a moderate increase, reaching 1.3 million tonnes and 700 000 tonnes respectively. Rice imports are expected to be stable at the level of 100 000 tonnes.

### **EUROPE**

#### EU (13 May)

As of 1 May 2004, 10 countries – Cyprus, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Slovakia, Slovenia – joined the EU bringing the total number of member countries in the Union to 25. Cereal output in the EU-25 is forecast to increase substantially from last year, 74 percent of the increase from the EU-15 countries, while the remainder would be among the ten new member countries. The aggregate wheat crop of the EU-25 is forecast at 123.7 million tonnes, compared to the total for these countries of 107.4 million tonnes in 2003. The planted area has increased to well above the average of the past five years and weather conditions have been generally favourable so far, and improved compared to the previous year, among both the western European countries and those in central Europe. A substantial rise in coarse grains production is also forecast in the EU, with the aggregate output for the 25 countries forecast to rise to 140.4 million tonnes, 12 percent up from 2003.

#### ALBANIA (13 May)

Cereal output is expected to be about average in 2004 after a relatively favourable growing season so far this year. Wheat output is forecast at about 285 000 tonnes and that of maize at 195 000 tonnes. With this level of production, the cereal import requirement for 2004/05 is expected to remain about the average of the past five years at around 370 000 tonnes.

#### BELARUS (10 May)

Latest official reports indicate that area planted with spring grains is about 1.4 million hectares. The aggregate area planted with grains (spring and winter) is now estimated at 2.4 million hectares, which is similar to area planted last year. Generally favourable weather conditions coupled with adequate availability of seeds, machinery and other inputs have resulted in good crop conditions. If favourable weather conditions prevail during the remainder of spring and early summer, the aggregate grain harvest, according to official estimates, may reach a record 5.8 million tonnes. Last year adverse weather conditions throughout the region resulted in a lower than expected cereal

harvest of 4.9 million tonnes in Belarus. Cereal import requirements, mainly wheat and maize, for the 2003/04 marketing year is estimated at 432 000 tonnes, while rye exports for the same period are estimated at 111 000 tonnes.

#### BOSNIA-HERZEGOVINA (12 May)

Latest reports indicate that favourable weather conditions have persisted throughout the country and both winter and spring crops are in satisfactory conditions. Spring crops account for more than 80 percent of the total cereal crops, which is also highly susceptible to weather volatility and summer floods. April floods have damaged some 20 000 hectares of crops in Banja Luka, Prijedor, Mrkonjic-Grad and Doboje regions. However, some of the damaged crop areas will be replanted with summer crops. An estimated 300 000 people have been affected by floods. Provided that favourable weather conditions prevail over the summer, aggregate cereal harvest is forecast at just over one million tonnes, which is similar to the harvest in 2003/04 marketing year but below the good harvest in 2002/03 by about 300 000 tonnes. Aggregate cereal import requirements during the 2004/05 marketing year is forecast at about 400 000 tonnes, including 60 000 tonnes in food aid.

#### BULGARIA (13 May)

Prospects are generally favourable for the 2004 cereal crops. The winter crops (mostly wheat) are reported to be in excellent condition and yields should rebound sharply from last year's drought-reduced levels although a recent dry spell, particularly in the north-eastern Wheat Belt may have reduced earlier potential. Wheat output is forecast at 2.8 million tonnes, almost 40 percent up from last year's poor crop but still below the average of the previous few years. The barley area is reported to be almost double last year's level and above the recent average. Spring maize plantings have also increased somewhat and output is forecast at 1.3 million tonnes, 8 percent up from 2003.

#### CROATIA (12 May)

Latest official reports indicate that cereal crops are in good conditions following improved weather during winter and early spring. Similar areas have been planted with winter cereals this year compared with 2003/04. Provided that favourable weather conditions prevail during summer, aggregate cereal harvest is forecast at about 3.1 million tonnes, which is nearly 600 000 tonnes up on last year's drought reduced harvest.

#### MOLDOVA (11 May)

Spring cereals have been planted on 663 000 hectares, which is significantly higher than the areas planted in the past couple of years. Following last year's devastating winter crop failure, many farmers have switched to spring crops. The aggregate planted area (winter and spring) this year is, however, down by about 44 000 hectares compared with area planted in 2002/03 marketing year. Crops in Moldova depend on late spring and summer precipitation and temperatures, which caused crop failure last year. Provided that favourable weather conditions persist, aggregate cereal harvest is tentatively forecast at about 2.3 million tonnes, which is twice last year's crop but down on the average by 300 000 tonnes.

#### ROMANIA (13 May)

Cereal output in Romania is set to rebound sharply after last year's drought-struck crop. Wheat output in 2004 is now forecast to more than double to about 5.4 million tonnes. However, this latest forecast is somewhat less than earlier expectations as dry weather has set in again in some major producing areas in recent weeks. Maize output is also forecast to rise to almost 10 million tonnes from 9.3 million tonnes in 2003, but much will depend on the weather in the coming few weeks.

### **RUSSIAN FEDERATION (11 May)**

Spring cereal planting campaign in the main cereal producing regions of the Russian Federation is complete, while planting in some areas was delayed following unusually cold weather conditions during April. The April frost has reportedly killed more than 1 million hectares of winter cereals, while yields from weaker winter crops and late spring cereals are seen to be significantly lower than expected. Early government estimates predict an aggregate grain harvest of about 75 million tonnes in 2004/05 marketing year, which is some 8.4 million tonnes up on last year's diminished harvest but more than 11 million tonnes down on 2002/03 harvest. Aggregate cereal export during the current (2003/04) marketing year is estimated at about 6.9 million tonnes. Cereal exports during the 2004/05 marketing year are forecast at about 7.5 million tonnes.

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

### **SERBIA AND MONTENEGRO (12 May)**

Winter cereals and newly planted spring crops are in good state following favourable weather conditions during winter and early spring. Area planted with cereals, mainly winter wheat and barley, is slightly up on last year while the government is attempting to increase area planted with maize and other summer industrial crops. Official estimates forecast an aggregate cereal harvest of about 7.5 million tonnes, which is some 2 million tonnes up on last year's reduced crop but below the good harvest of about 8.9 million tonnes in 2001. The forecasts are on the conservative side and much depends on weather conditions during summer. Cereal import requirement during the 2004/05 marketing year is forecast at 323 000 tonnes, while exports are forecast at 160 000 tonnes of mainly wheat and maize.

### **THE FORMER YUGOSLAV REPUBLIC OF MACEDONIA (13 May)**

Cereal output and quality in 2004 is expected to be again constrained by farmers' limited finances for inputs and field operations. Despite generally favourable weather conditions, low quality seeds used, and limited crop protection measures means that cereal output will likely remain close to last year's relatively poor level of about 470 000 tonnes. The country normally imports some cereals, mostly wheat and maize, to meet annual consumption needs, and, based on the forecast production for 2004, the 2004/05 cereal imports are expected to be around 140 000 tonnes.

### **UKRAINE (11 May)**

Spring cereal planting, mainly wheat and barley, is almost complete with some delays following an unusually cold spring. Late frost in April has damaged more than 1 million hectares of winter cereals, while inadequate soil moisture during early spring in southern Ukraine may significantly impact yields. The government intends to match the significantly high areas planted with maize last summer. Aggregate cereal harvest this year is estimated at slightly over 33 million tonnes, which is more than 13.3 million tonnes up on last year's poor harvest but about 5.3 million tonnes down on the record harvest of 2001/02 marketing year. This year's tentative forecast, which is highly vulnerable to weather conditions, includes some 15.6 million tonnes of wheat, 8.4 million tonnes of barley and 6.2 million tonnes of maize.

During the 2003/04 marketing year the Ukraine, for the first time in the past decade, became net cereal importer with imports totalling some 3.7 million tonnes following crop failure last year. Aggregate cereal exports are tentatively forecast at about 7.5 million tonnes during the 2004/05 marketing year.

## **NORTH AMERICA**

### **CANADA (13 May)**

The Statistics Canada (STC) seeding intentions survey for 2004/05, conducted during late March, indicated that Canadian farmers plan to shift some area out of wheat and coarse grains into non-cereal crops and the overall cereal area for the year will decrease. An increase in maize area in eastern Canada may be the only exception. However, on the basis of the planting survey, and assuming trend yields for all regions except for Alberta and Saskatchewan, where precipitation has been below normal and subsoil moisture reserves remain low, output of wheat is nevertheless forecast by Agriculture and Agri-Food Canada (AAFC) to increase slightly in 2004 because of higher yields expected for durum, which normally makes up about 20 percent of the total crop. Production of coarse grains is now expected to decrease marginally by about 1 percent to about 26.4 million tonnes.

As of 10 May, good seeding progress was reported in all three major producing prairie provinces. Overall, seeding progress was estimated at 26 percent complete, slightly ahead of the normal 20 percent for the corresponding date. Precipitation in the form of both snow and rain during the week ending 10 May provided welcome moisture in western growing areas of Alberta.

### **UNITED STATES (13 May)**

The latest USDA Crop Production report in early May forecast the wheat output in 2004 at 56.6 million tonnes, 11 percent down from last year's crop but about the average of the past five years. In addition to a 3 percent decline in the area sown to winter wheat, the condition of crops during the current season has remained consistently below the previous season because of persisting dry conditions in parts of the Southern Plains. As of 9 May, the portion of the winter wheat crop rated good to excellent was 45 percent, 7 percentage points below a year earlier. Regarding the spring wheat crop, which is still being planted in some parts, the USDA Prospective Plantings report at the end of March indicated declines in the spring wheat and durum areas of 4 percent and 5 percent respectively. Planting was reported to be 84 percent complete by 9 May, 17 percentage points ahead of the previous year's pace and 26 percentage points ahead of the average for the same date.

Above-normal temperatures and dry condition across the Corn Belt in early April encouraged rapid planting of the summer coarse grain crops. By 9 May, 84 percent of the expected maize area had been planted, 22 percentage points ahead of a year earlier and 21 percentage points ahead of the average for the same date. The generally satisfactory planting conditions for the summer crops prompted a significant increase in the production forecast in the USDA May Crop Production report. Maize output in 2004 is now forecast to reach 264.8 million tonnes, 3 percent above the previous year's crop and almost 9 percent above the average of the past five years.

## **OCEANIA**

### **AUSTRALIA (12 May)**

After a satisfactory start to the winter crop planting season earlier this year, a return to drier conditions in late April and early May, especially in the eastern regions, dampened hopes of a bumper output this year. Although it is still too early to estimate the final sown area, as plantings can continue through May and into June, latest indications suggest that the wheat crop could not likely exceed the March forecast of 21.9 million tonnes by the Australian Bureau of Agricultural and Resource Economics (ABARE). The wheat production in 2003 was a record 25 million tonnes. ABARE is also forecasting a 2004 barley crop of almost 8 million tonnes, down from 8.5 million tonnes in 2003 but well up from the drought-affected crop in 2002. The aggregate cereal crop in 2004 is forecast at 34.8 million tonnes, 9 percent down from 2003.

**ESTIMATED CEREAL IMPORT REQUIREMENTS OF LOW-INCOME FOOD-DEFICIT COUNTRIES 1/  
a) 2003/04 or 2004 estimates (in thousand tonnes)**

COUNTRY	Marketing year	2002/03 or 2003			2003/04 or 2004			
		Actual imports			Total import requirements (excluding re-exports)	Import position		
		Commercial purchases	Food aid	Total commercial and aid		Total commercial and aid	Food aid allocated committed or shipped	Commercial purchases
<b>AFRICA</b>		<b>33 239.8</b>	<b>4 038.2</b>	<b>37 278.0</b>	<b>32 977.5</b>	<b>17 022.8</b>	<b>1 996.7</b>	<b>15 026.1</b>
<b>Northern Africa</b>		<b>15 927.8</b>	<b>15.4</b>	<b>15 943.2</b>	<b>13 967.0</b>	<b>11 340.4</b>	<b>17.1</b>	<b>11 323.3</b>
Egypt	July/June	11 709.6	11.0	11 720.6	11 700.0	9 185.1	17.1	9 168.0
Morocco	July/June	4 218.2	4.4	4 222.6	2 267.0	2 155.3	0.0	2 155.3
<b>Eastern Africa</b>		<b>3 459.0</b>	<b>2 449.9</b>	<b>5 908.9</b>	<b>4 984.0</b>	<b>1 493.4</b>	<b>632.2</b>	<b>861.2</b>
Burundi	Jan./Dec.	47.4	49.4	96.8	82.0	34.8	34.8	0.0
Comoros	Jan./Dec.	23.6	0.0	23.6	33.0	0.3	0.0	0.3
Djibouti	Jan./Dec.	56.6	6.4	63.0	66.0	18.7	1.6	17.1
Eritrea	Jan./Dec.	231.0	310.4	541.4	415.0	65.9	65.9	0.0
Ethiopia	Jan./Dec.	264.4	1 683.9	1 948.3	232.0	141.6	141.6	0.0
Kenya	Oct./Sept.	887.4	84.4	971.8	1 610.0	356.8	80.8	276.0
Rwanda	Jan./Dec.	205.2	21.2	226.4	236.0	16.5	16.5	0.0
Somalia	Aug./July	260.6	19.4	280.0	310.0	69.8	19.4	50.4
Sudan	Nov./Oct.	1 023.5	111.0	1 134.5	1 275.0	410.4	99.4	311.0
Tanzania,U.R.	June/May	399.9	40.1	440.0	560.0	313.8	109.8	204.0
Uganda	Jan./Dec.	59.4	123.7	183.1	165.0	64.8	62.4	2.4
<b>Southern Africa</b>		<b>3 360.8</b>	<b>1 067.0</b>	<b>4 427.8</b>	<b>3 319.0</b>	<b>2 733.7</b>	<b>968.5</b>	<b>1 765.2</b>
Angola	April/March	521.2	223.9	745.1	709.0	623.6	203.4	420.2
Lesotho	April/March	212.0	41.7	253.7	245.0	196.2	16.7	179.5
Madagascar	April/March	295.5	51.5	347.0	353.0	165.3	45.0	120.3
Malawi	April/March	450.3	184.4	634.7	96.0	21.6	19.9	1.7
Mozambique	April/March	547.6	139.6	687.2	673.0	699.5	241.0	458.5
Swaziland	May/April	72.5	20.1	92.6	124.0	101.6	12.0	89.6
Zambia	May/April	291.4	89.7	381.1	83.0	109.1	65.6	43.5
Zimbabwe 2/	April/March	970.3	316.1	1 286.4	1 036.0	816.8	364.9	451.9
<b>Western Africa</b>		<b>9 537.0</b>	<b>437.6</b>	<b>9 974.6</b>	<b>9 761.9</b>	<b>1 336.5</b>	<b>325.0</b>	<b>1 011.5</b>
<b>Coastal Countries</b>		<b>6 938.1</b>	<b>227.6</b>	<b>7 165.7</b>	<b>7 314.5</b>	<b>919.0</b>	<b>131.9</b>	<b>787.1</b>
Benin	Jan./Dec.	128.8	11.0	139.8	133.0	28.0	6.3	21.7
Côte d'Ivoire	Jan./Dec.	1 370.5	10.9	1 381.4	1 391.5	240.2	6.5	233.7
Ghana	Jan./Dec.	538.8	70.5	609.3	506.0	113.0	49.4	63.6
Guinea	Jan./Dec.	338.5	33.2	371.7	370.0	8.5	7.7	0.8
Liberia	Jan./Dec.	132.1	48.4	180.5	187.0	40.5	38.5	2.0
Nigeria	Jan./Dec.	4 070.0	0.0	4 070.0	4 330.0	403.4	10.5	392.9
Sierra Leone	Jan./Dec.	250.4	45.6	296.0	287.0	23.8	13.0	10.8
Togo	Jan./Dec.	109.0	8.0	117.0	110.0	61.6	0.0	61.6
<b>Sahelian Countries</b>		<b>2 598.9</b>	<b>210.0</b>	<b>2 808.9</b>	<b>2 447.4</b>	<b>417.5</b>	<b>193.1</b>	<b>224.4</b>
Burkina faso	Nov./Oct.	243.1	27.4	270.5	267.6	20.0	20.0	0.0
Cape Verde	Nov./Oct.	41.1	35.4	76.5	85.7	48.5	48.5	0.0
Chad	Nov./Oct.	80.0	15.8	95.8	97.3	12.3	12.3	0.0
Gambia	Nov./Oct.	150.3	6.9	157.2	143.7	2.3	2.3	0.0
Guinea Bissau	Nov./Oct.	59.0	14.0	73.0	72.3	6.6	6.6	0.0
Mali	Nov./Oct.	267.2	6.8	274.0	170.1	0.8	0.7	0.1
Mauritania	Nov./Oct.	390.2	78.9	469.1	285.0	87.5	62.5	25.0
Niger	Nov./Oct.	336.8	9.9	346.7	398.0	20.3	20.3	0.0
Senegal	Nov./Oct.	1 031.2	14.9	1 046.1	927.7	219.2	19.9	199.3
<b>Central Africa</b>		<b>955.2</b>	<b>68.3</b>	<b>1 023.5</b>	<b>945.6</b>	<b>118.8</b>	<b>53.9</b>	<b>64.9</b>
Cameroon	Jan./Dec.	401.1	7.0	408.1	387.0	32.4	17.0	15.4
Cent.Afr.Rep.	Jan./Dec.	39.5	3.5	43.0	46.0	1.3	1.3	0.0
Congo, Dem.Rep.	Jan./Dec.	305.4	51.0	356.4	300.0	76.1	35.5	40.6
Congo, Rep.	Jan./Dec.	184.3	5.7	190.0	185.0	9.0	0.1	8.9
Eq. Guinea	Jan./Dec.	15.0	0.0	15.0	16.0	0.0	0.0	0.0
Sao Tome	Jan./Dec.	9.9	1.1	11.0	11.6	0.0	0.0	0.0

ESTIMATED CEREAL IMPORT REQUIREMENTS OF LOW-INCOME FOOD-DEFICIT COUNTRIES 1/  
a) 2003/04 or 2004 estimates (in thousand tonnes)

COUNTRY	Marketing year	2002/03 or 2003			2003/04 or 2004			
		Actual imports			Total import requirements (excluding re-exports)	Import position		
		Commercial purchases	Food aid	Total commercial and aid		Total commercial and aid	Food aid allocated committed or shipped	Commercial purchases
<b>ASIA/NEAR EAST</b>		<b>38 013.2</b>	<b>3 155.2</b>	<b>41 168.4</b>	<b>41 778.0</b>	<b>21 275.8</b>	<b>2 069.6</b>	<b>19 206.2</b>
Afghanistan	July/June	1 018.7	376.8	1 395.5	506.0	227.0	146.7	80.3
Armenia	July/June	123.0	29.0	152.0	171.0	56.3	38.2	18.1
Azerbaijan	July/June	701.0	9.0	710.0	491.0	516.5	63.2	453.3
Bangladesh	July/June	3 074.9	383.9	3 458.8	2 748.0	2 351.6	247.0	2 104.6
Bhutan	July/June	67.9	3.1	71.0	60.0	3.3	3.3	0.0
Cambodia	Jan./Dec.	93.0	13.1	106.1	58.0	18.6	18.6	0.0
China 3/	July/June	9 114.9	85.1	9 200.0	12 400.0	4 998.0	21.8	4 976.2
Georgia	July/June	479.0	18.0	497.0	485.0	493.7	82.3	411.4
India	April/March	33.9	188.5	222.4	220.0	57.4	17.6	39.8
Indonesia	April/March	9 125.9	178.5	9 304.4	8 592.0	5 207.4	218.5	4 988.9
Iraq	July/June	2 245.7	395.1	2 640.8	3 444.0	2 536.9	454.9	2 082.0
Korea, D.P.R.	Nov./Oct.	442.1	963.7	1 405.8	944.0	623.0	347.5	275.5
Kyrgyz Republic	July/June	127.0	8.0	135.0	182.0	1.0	1.0	0.0
Lao, P.D.R.	Jan./Dec.	19.2	19.3	38.5	27.0	0.0	0.0	0.0
Maldives	Jan./Dec.	23.4	14.6	38.0	40.0	0.6	0.0	0.6
Mongolia	Oct./Sept.	238.0	0.0	238.0	248.0	74.5	33.5	41.0
Nepal	July/June	96.1	3.9	100.0	100.0	8.8	8.8	0.0
Pakistan	May/April	263.6	74.2	337.8	300.0	200.9	14.0	186.9
Philippines	July/June	4 470.0	68.2	4 538.2	4 300.0	2 567.6	106.1	2 461.5
Sri Lanka	Jan./Dec.	1 125.6	25.4	1 151.0	1 523.0	82.8	12.0	70.8
Syria	July/June	1 894.8	9.2	1 904.0	1 600.0	698.2	7.3	690.9
Tajikistan	July/June	437.0	140.0	577.0	226.0	65.0	49.3	15.7
Turkmenistan	July/June	60.0	0.0	60.0	34.0	7.2	0.0	7.2
Uzbekistan	July/June	255.0	118.0	373.0	409.0	113.1	82.1	31.0
Yemen	Jan./Dec.	2 483.5	30.6	2 514.1	2 670.0	366.4	95.9	270.5
<b>CENTRAL AMERICA</b>		<b>3 020.7</b>	<b>245.9</b>	<b>3 266.6</b>	<b>3 370.0</b>	<b>2 053.2</b>	<b>166.7</b>	<b>1 886.5</b>
Cuba	July/June	1 723.8	1.2	1 725.0	1 820.0	1 075.8	0.0	1 075.8
Haiti	July/June	464.8	160.2	625.0	620.0	351.7	50.7	301.0
Honduras	July/June	573.1	28.9	602.0	645.0	415.2	67.3	347.9
Nicaragua	July/June	259.0	55.6	314.6	285.0	210.5	48.7	161.8
<b>SOUTH AMERICA</b>		<b>780.4</b>	<b>62.9</b>	<b>843.3</b>	<b>901.0</b>	<b>764.7</b>	<b>26.3</b>	<b>738.4</b>
Ecuador	July/June	780.4	62.9	843.3	901.0	764.7	26.3	738.4
<b>OCEANIA</b>		<b>401.2</b>	<b>0.0</b>	<b>401.2</b>	<b>402.8</b>	<b>40.7</b>	<b>0.0</b>	<b>40.7</b>
Kiribati	Jan./Dec.	8.6	0.0	8.6	8.7	0.0	0.0	0.0
Papua New Guinea	Jan./Dec.	335.5	0.0	335.5	336.0	40.7	0.0	40.7
Samoa	Jan./Dec.	15.5	0.0	15.5	15.5	0.0	0.0	0.0
Solomon Isl.	Jan./Dec.	29.5	0.0	29.5	29.5	0.0	0.0	0.0
Tuvalu	Jan./Dec.	1.1	0.0	1.1	1.1	0.0	0.0	0.0
Vanuatu	Jan./Dec.	11.0	0.0	11.0	12.0	0.0	0.0	0.0
<b>EUROPE</b>		<b>1 356.4</b>	<b>111.6</b>	<b>1 468.0</b>	<b>1 422.0</b>	<b>312.1</b>	<b>23.8</b>	<b>288.3</b>
Albania	July/June	361.8	27.2	389.0	390.0	208.1	23.8	184.3
Belarus	July/June	579.0	0.0	579.0	432.0	87.6	0.0	87.6
Bosnia-Herzegovina	July/June	315.6	84.4	400.0	460.0	16.4	0.0	16.4
Macedonia, FYR	July/June	100.0	0.0	100.0	140.0	0.0	0.0	0.0
<b>TOTAL</b>		<b>76 811.7</b>	<b>7 613.8</b>	<b>84 425.5</b>	<b>80 851.3</b>	<b>41 469.3</b>	<b>4 283.1</b>	<b>37 186.2</b>

SOURCE: FAO

1/ Includes food deficit countries with per caput income below the level used by the World Bank to determine eligibility for IDA assistance (i.e. U.S.\$ 1 435 in 2001), which is in accordance with the guidelines and criteria agreed to by the CFA should be given priority in the allocation of food aid. 2/ Even if is not a LIFD country, has been included for facing large food deficit for 2 consecutive years. 3/ Includes import requirements of Taiwan Province.

<b>C O N T E N T S</b> .....	<b>page</b>
Affected countries .....	2
Crop and food supply situation .....	3
Country reports .....	6
Northern Africa .....	6
Western Africa .....	7
Central Africa .....	12
Eastern Africa .....	13
Southern Africa .....	16
Asia/Near East .....	22
Central America .....	30
South America .....	33
Europe .....	35
North America .....	38
Oceania .....	38
 Summary tables	
Estimates for 2003/04 or 2004 .....	39

## **DEFINITIONS**

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

**Shortfalls in food supplies in current marketing year, requiring exceptional external assistance:** This expression is used for an exceptional shortfall in aggregate supplies or a localized deficit as a result of crop failures, natural disasters, interruption of imports, disruption of distribution, excessive post-harvest losses, supply bottlenecks and/or an increased demand for food arising from population movements within the country or an influx of refugees. In the case of an exceptional shortfall in aggregate food supplies, exceptional and/or emergency food aid may be required to cover all or part of the deficit.

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

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

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

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

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