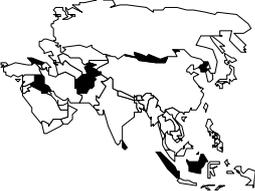
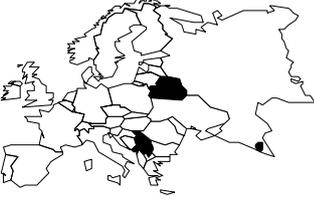


FOODCROPS AND SHORTAGES

No. 1

February 2004

| | |
|---|--|
|  | <p>AFRICA: In eastern Africa, the overall food situation improved considerably compared to last year. However, a large number of people affected by conflict and/or drought in the sub-region still depend on food assistance. The food situation in Eritrea, Somalia and pastoral areas of Ethiopia and Kenya is of particular concern. In southern Africa, prospects for the 2004 cereal crops are generally unfavourable due to prevailing drought conditions. In western Africa, the food outlook is generally satisfactory except in Côte d'Ivoire, Guinea, Liberia and Sierra Leone where internally displaced people and refugees continue to need food assistance.</p> |
|  | <p>ASIA: A food crisis persists in DPR Korea due to chronic food shortages, and food assistance is urgently required. Emergency relief, including food, is being provided to some 100 000 most vulnerable people of earthquake victims in the Islamic Republic of Iran. Emergency assistance is also being provided to the farmers affected by avian influenza virus in several countries. The rice crop has been severely affected by drought in several districts in Sri Lanka. In the Asian CIS, improved precipitation and snow cover have provided favourable conditions for winter crops. In Afghanistan, above-average precipitation and snow cover have improved prospects for the winter cereal crops.</p> |
|  | <p>LATIN AMERICA AND THE CARIBBEAN: In Haiti, delivery of food assistance is facing growing difficulties due the escalation of violence and civil unrest, particularly in the Northern department that has also recently been affected by flooding. Food assistance continues to be provided also in El Salvador, Guatemala, Honduras and Nicaragua to rural families affected by the severe crisis in the coffee sector. In South America, overall prospects for coarse grain are favourable, but in Ecuador, production of maize and rice may be affected by dry weather at planting time.</p> |
|  | <p>EUROPE: A strong recovery in cereal production is expected in the EU in 2004, reflecting better weather after drought last year, favourable price prospects for cereals and a 5 percent reduction in the set-aside requirement. A substantial output recovery is also in prospect among the central and eastern European countries reflecting favourable weather and good price prospects. In the European CIS, despite favourable weather conditions, area planted with winter cereals is below average due to lack of sufficient planting material.</p> |
|  | <p>NORTH AMERICA: Latest information points to a reduced wheat output in 2004 in the United States. The winter wheat area has declined while winter weather and crop conditions suggest that the percent of abandonment may be higher and yields lower than average in some major producing regions. The main 2004 crops in Canada have still to be sown but early indications point to a possible increase in output this year due to a further recovery in yields after moisture deficits in the past two years.</p> |
|  | <p>OCEANIA: Australia's 2003 cereal output is estimated at 36.3 million tonnes, sharply up from the previous year's drought-devastated output. Early prospects for the 2004 summer coarse grain crop (mostly sorghum) are very favourable reflecting good rains in the main producing areas.</p> |



AFFECTED COUNTRIES ^{1/}

COUNTRIES REQUIRING EXCEPTIONAL EXTERNAL ASSISTANCE (total: 38 countries)

| <u>Region/Country</u> | <u>Reason for emergency</u> | <u>Region/Country</u> | <u>Reason for emergency</u> |
|-------------------------------------|---------------------------------------|---|---|
| <u>AFRICA</u> (24 countries) | | <u>ASIA</u> (7 countries) | |
| Angola | Returnees | Afghanistan* | Effects of recent drought and civil strife |
| Burundi* | Civil strife, IDPs | Georgia* | Structural problems and input shortages |
| Cape Verde | Drought | Iraq* | Recent war, shortage of inputs |
| Central Afr. Rep. | Civil strife | Korea, DPR* | Adverse weather, economic constraints |
| Congo, Dem.Rep.* | Civil strife, IDPs and refugees | Mongolia* | Harsh winters, economic constraints |
| Congo Rep. of | Civil strife, IDPs | Tajikistan* | Effects of recent drought and structural shocks |
| Côte d'Ivoire | Civil strife, IDPs | Timor-Leste | Drought, flooding |
| Eritrea* | Drought, IDPs, returnees | | |
| Ethiopia* | Drought in parts, IDPs | <u>LATIN AMERICA</u> (5 countries) | |
| Guinea* | IDPs and refugees | El Salvador* | Effects of adverse weather and economic shocks |
| Kenya | Drought in parts | Guatemala* | Effects of adverse weather and economic shocks |
| Lesotho* | Drought | Haiti* | Civil strife, flooding |
| Liberia* | Civil strife, IDPs | Honduras* | Effects of adverse weather and economic shocks |
| Madagascar | Drought in southern parts | Nicaragua* | Effects of adverse weather and economic shocks |
| Mauritania | Drought | | |
| Malawi | Drought in parts | <u>EUROPE</u> (2 countries) | |
| Mozambique | Drought in southern parts | Russian Federation (Chechnya) | Civil strife |
| Sierra Leone* | Civil strife, IDPs | Serbia & Montenegro* | Refugees |
| Somalia* | Civil strife, drought in parts | | |
| Sudan* | Civil strife, drought in parts | | |
| Swaziland | Drought in parts | | |
| Tanzania, U.R. | Drought in parts, refugees | | |
| Uganda | Civil strife, IDPs, drought in parts | | |
| Zimbabwe* | Drought in parts, economic disruption | | |

COUNTRIES WITH UNFAVOURABLE PROSPECTS FOR CURRENT CROPS

| <u>Country</u> | <u>Main contributing factor</u> | <u>Country</u> | <u>Main contributing factor</u> |
|----------------|---------------------------------|----------------|---------------------------------|
| Kenya | Inadequate rainfall | Sri Lanka | Drought |
| Lesotho* | Drought | Swaziland | Drought |
| South Africa | Drought | Tanzania, U.R. | Dry weather |

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

Afghanistan, Sudan, Ethiopia

^{1/} Both here and in the text, countries with unfavourable prospects for current crop and/or uncovered shortfalls are marked in **boldface**, and those affected or threatened by successive poor crops or food shortages are marked with an asterisk [*]. Definitions can be found on the Contents page. This updates information on food emergencies in the November issue of *Food Outlook*.

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

CROP AND FOOD SUPPLY SITUATION

OVERVIEW

As of February 2004, the number of countries facing serious food shortages throughout the world stands at 38 with 24 in Africa, 7 in Asia, 5 in Latin America and 2 in Europe. In many of these countries, food shortages are being compounded by the effect of the HIV/AIDS pandemic on food production, marketing and transport: recently published joint FAO/WFP Crop and Food Supply Assessment reports highlight this factor (see <http://www.fao.org/WAICENT/faoinfo/economic/gIEWS/english/alertes/sptoc.htm>).

In **eastern Africa**, harvesting of the 2003/04 secondary cereal crops is almost complete in most countries, except in Ethiopia where planting is about to commence. The outlook is generally poor in the United Republic of Tanzania and Kenya mainly due to inadequate rainfall. In addition, pastoral areas in the region, particularly in Eritrea, Ethiopia, Kenya and Somalia, have received poor seasonal rains resulting in water and pasture stress.

The overall food supply situation in the region, however, has generally improved with bumper harvests in Ethiopia and the Sudan from last main season crops. However, in Eritrea, despite improved cereal harvest compared to the previous year, output was more than 40 percent below average.

Overall, the food security situation of a large number of people affected by civil strife and drought in the region is highly precarious, including 7.2 million in Ethiopia, 3.6 million in the Sudan, 1.6 million each in UR Tanzania and Uganda, 1.9 million in Eritrea, 1.2 million in Kenya and 580 000 in Somalia.

In **southern Africa**, prospects for the 2004 cereal crops are generally unfavourable at this stage due to prevailing drought conditions in South Africa, Lesotho, Swaziland, and parts of Mozambique, Malawi, Zimbabwe, Botswana, Namibia and Angola. The sub-region has faced an erratic rainfall pattern with heavy rains in early February causing flooding in the Caprivi Strip and Upper Zambezi plain. Current drought in eastern South Africa, Swaziland and southern Mozambique is compounding the agricultural and food security situation already undermined by successive droughts since 2002 in the sub-region. In other parts of the sub-region the outlook remains favourable at this time. The weather and crop situation needs to be closely monitored in the coming weeks.

Household food security in the sub-region, exacerbated by the escalating maize prices in South Africa and Zimbabwe, is at its lowest during the February-April lean period just prior to the next harvest. Numbers of vulnerable people requiring food assistance have been revised upwards in Zimbabwe, Angola and Malawi. Food aid donations of only 509 000 tonnes or 68 percent of the amount appealed to assist 6.55 million beneficiaries in Lesotho, Malawi, Mozambique, Swaziland, Zambia, and Zimbabwe, had been received or confirmed by the end of January 2004.

In **the Great Lakes region**, food production in Burundi (cereals, legumes, roots and tubers and banana and plantain) from the first season crops in 2004 is estimated at 1.1 million metric tonnes, about 2 percent higher than the year before but still below pre-crisis period average of 1988-93. The overall security situation in the region has improved except in some localised areas, however, food aid continues to be required in the Democratic Republic of Congo, Burundi and Rwanda for the vulnerable and IDP groups as the nutritional situation of these people remains critical.

In **central Africa**, crop prospects are unfavourable and food security remains precarious in the Central Africa Republic due to mass population displacement.

In **northern Africa**, following favourable weather conditions in all countries of the sub-region, early prospects for the winter cereal crops to be harvested from April are so far favourable in Algeria, Egypt, Morocco and Tunisia. Production of cereals in the sub-region last year is estimated at a record 36 million tonnes, 8 million tonnes higher than the average crop harvested in 2002.

In **west Africa**, the 2003 aggregate cereal production for the nine Sahelian countries has been estimated at a record 14.3 million tonnes, some 2.9 million tonnes higher than the above-average crop of 11.4 million tonnes harvested in 2002. Production was significantly above average in all countries except Cape Verde. In the coastal countries along the Gulf of Guinea, aggregate production of cereals is estimated at 30.6 million tonnes, slightly higher than previous year and above average.

In **Asia**, food supply prospects are generally favourable mainly due to good harvest. With generally favourable monsoon rains, rice - the major food grain in the region - reached all time record production levels in many countries in 2003, including: Bangladesh; Cambodia; Lao People's Democratic Republic; Malaysia; Myanmar; Philippines; Sri Lanka; Thailand and Viet Nam. India, Indonesia and Nepal also had bumper harvests of rice. The Islamic Republic of Iran and Pakistan had increased outputs of wheat. Ten Asian countries: Viet Nam, Thailand, South Korea, Taiwan, Japan, Indonesia, Cambodia, China, Lao People's Democratic Republic and Pakistan have been hit by the avian influenza virus. Up to 10 February, 19 persons had died and millions of poultry had been killed. The maize feed demand and soybeans market have been affected seriously. In Afghanistan, improved precipitation and snow cover throughout the country have reportedly enabled farmers to nearly match last year's record area planted with winter cereals, mainly wheat. Spring and early summer precipitation and temperatures are important factors affecting aggregate harvest.

In the **Near East**, recent precipitation and snow cover in most countries have improved prospects for winter grains for harvest from May 2004.

In the **Asian CIS** countries, improved precipitation and snow cover throughout the region have been reported and prospects are for an improved harvest this year. The improvement in forecast harvest is seen more in the food deficit countries of the region, many of which have required some food aid in the recent past. Kazakhstan continued to supply much of the cereal deficit in the region and beyond. Winter crops throughout the region are reported in satisfactory condition, which are the most important crops in the region, except in Kazakhstan.

In **Central America and the Caribbean**, harvesting of the 2003/04 second and third *apante* crops is about to be completed. Aggregate cereal output in 2003 was estimated at about 1 million tonnes above the last five years' average, particularly due to the recovery of production in Honduras and Nicaragua. However, the crisis of the coffee sector in the sub-region continues to negatively affect the food security of large sections of population. Food assistance is being delivered to the most affected households. In Haiti, the escalation of violence and the civil strife continues to hamper the delivery of critical food aid, especially in the Northern department that was seriously hit by heavy rains and flooding at the end of 2002.

In **South America**, harvesting of the 2003 wheat crop has been completed in the southern areas of the sub-region. Aggregate wheat output in 2003 is estimate at 21.6 million tonnes, 3.6 million tonnes above the previous year's level and above average. This result is mainly due to the record crop obtained in Brazil and the good harvest in Argentina. In Brazil and Chile, harvesting of the 2004 summer maize crop is about to start. In the Andean countries, dry weather in coastal areas of Ecuador seriously affected the cereal planted area. By contrast, heavy rains have been reported in various departments of Bolivia and Colombia with serious damages to housing and infrastructure. In Colombia and Venezuela harvesting of coarse grains is well advanced and an above-average output is estimated.

In **Europe**, a strong recovery in cereal production is expected in the EU in 2004 after drought sharply reduced output last year. The winter wheat area is estimated to have increased in response to improved price prospects for the 2004/05 marketing season and a 5 percent reduction in the set-aside requirement should promote an increase in the spring cereal area also. The winter crops are reported to be in generally good condition so far. Among the central and eastern European countries (CEECs), prospects for the winter cereal crops are also generally favourable and planted areas are reported to have increased throughout the region, reflecting favourable autumn weather and the incentive of good price prospects.

In the **European CIS**, generally favourable weather conditions and ample soil moisture coupled with ample protective snow cover have resulted in lower than average winterkill and satisfactory crop conditions throughout the region. In view of seed and other input shortages in some parts of the Russian Federation and Ukraine, area planted with winter cereals dropped by about 1 million hectares relative to the target in each country. Belarus has maintained the high areas planted with winter cereals, while in Moldova areas under winter cereals are below expectations. The governments in the region are hoping to offset the reduced winter cereal areas by increasing areas planted in spring. The region lost its place in the international cereal export market following significant crop failures in Ukraine, the Russian Federation and Moldova.

In the **Balkans**, favourable weather conditions and sufficient access to farm inputs encouraged farmers to match areas planted with winter cereals in 2001/02, when above-average harvest was collected. Winter crop conditions are reported to be satisfactory but it is too early to forecast the output, given the volatile nature of

weather conditions in the region. Last year the region suffered significant crop losses following unusually cold winter and very dry summer.

In **North America**, the latest information points to a reduction in wheat output in 2004 in the United States. The total area sown to winter wheat declined by 3 percent and the yield potential of some crops is expected to have been reduced by dry conditions at planting while the risk of winterkill has also increased this year due to limited snow cover. The 2003 wheat output was the highest of the past five years at 63.6 million tonnes. In Canada, the grain crops are mostly sown in May/June. Early tentative forecasts point to an increase in the aggregate cereal production in 2004, which would largely result from increased yields as the aggregate area sown is estimated to decrease.

In **Oceania**, the 2003 cereal production in Australia recovered strongly from the previous year's drought-reduced crop, being officially estimated in December at 36.3 million tonnes (2002: 19 million tonnes). Early prospects for the 2004 summer coarse grain crop (mostly sorghum) are very favourable reflecting good rains in the main producing areas.

COUNTRY REPORTS

AFRICA

NORTHERN AFRICA

ALGERIA (11 February)

Timely and good rains at planting time in November prompted early sowing of winter cereals to be harvested in May/June. Following favourable temperature and moisture conditions, reported better than last year, and adequate availability of agricultural inputs, the prospects for the 2004 harvest of wheat and barley appear to be so far favourable. Aggregate production of cereals in 2003 is estimated at a record high of 4.2 million tonnes, a noticeable recovery from the 2002 drought-affected crop of 1.5 million tonnes and double the average for the preceding five years. Wheat output reached 2.9 million tonnes compared to 1.1 million tonnes harvested the previous year and the five-year average of 1.5 million tonnes. Barley output increased more than three times to 1.2 million tonnes.

Reflecting this bumper crop, imports of cereals in 2003/04 (July/June) are expected to decrease by more than 1 million tonnes to 5.6 million tonnes.

EGYPT (11 February)

The early prospects for the mainly irrigated wheat crop, to be harvested from mid-April, are favourable. The area sown is estimated at some 1.05 million hectares, similar to 2003 average plantings. The area sown to barley, estimated at 47 000 hectares has declined slightly but remains above the average for the previous five years. Land preparation is underway for the sowing of the maize crop from April while the rice crop will be planted in May and harvested from September. Availability of agricultural inputs is reported to be adequate. Aggregate cereal production in 2003 is estimated at 20.66 million tonnes, an increase of some 3 percent compared to the above-average harvest of the previous year. Similar increases are reported for both wheat and maize outputs, estimated at 6.85 million tonnes and 6.54 million tonnes, respectively. Paddy production in 2003 is estimated at 6.18 million tonnes compared to 6 million tonnes harvested in the previous year.

Wheat imports in marketing year 2003/04 (July/June) are expected to be about 6.5 million tonnes, some 100 000 tonnes above the relatively high level of imports in the previous year, reflecting the steady domestic demand for this important staple. Maize imports, mainly for feed use, should increase from the previous year's 5.3 million tonnes to some 5.6 million tonnes in marketing year 2003/04 (July/June).

MOROCCO (21 February)

Reflecting widespread above normal rainfall from the beginning of the growing season, crop development is progressing satisfactorily and the prospects for the 2004 crop to be harvested from May are generally favourable. Assuming normal weather for the rest of the growing season, cereal production in 2004, mostly wheat and barley, is likely to be similar to the bumper crop of 7.96 million tonnes harvested last year. Production of wheat and barley in 2003 both increased by more than 50 percent to 5.15 million tonnes and 2.62 million tonnes, respectively.

Aerial and ground control operations are underway in south-western areas against desert locust hopper bands.

Reflecting the bumper 2003 cereal harvest, imports of cereals in the marketing year 2003/2004 (July/June) are forecast at about 2.2 million tonnes, a reduction of nearly 2 million tonnes compared to the previous year.

TUNISIA (11 February)

Sowing of the wheat and barley crops has been recently completed under generally favourable weather conditions. Crops are developing satisfactorily and the prospects for the 2004 winter crops to be harvested from May are favourable so far. Barring adverse weather for the rest of the growing season, output of wheat and barley in 2004 is forecast at 1.3 million tonnes and 0.51 million tonnes, respectively. These levels of production are drastically lower than the record outputs of 1.98 million tonnes for wheat and 0.91 million tonnes for barley estimated for 2003, but remain above the average for the previous five years. Thus, imports of cereals in the marketing year ending in June 2005 will decrease for the second year in succession.

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 (11 February)

Land preparation is underway for the sowing of the main maize crop due for harvest from July. Following favourable growing conditions, the 2003 cereal output – mostly maize – is estimated at 1.1 million tonnes, about 10 percent higher than last year. The overall food situation is satisfactory. Markets are well supplied and prices of maize are lower than last year.

Retained imports of cereals in 2004 are estimated at some 115 000 tonnes, similar to net imports in the previous year.

BURKINA FASO (11 February)

Seasonably dry conditions prevail. Exceptionally favourable weather last year resulted in a record cereal crop for the second year in succession. The 2003 aggregate cereal production has been estimated by a joint FAO/CILSS/FEWSNET Crop Assessment Mission at 3.6 million tonnes, an increase of about 17 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 grains stocks. Replenishment of the national food reserve as well as local purchases and triangular transactions by donors are strongly recommended to support domestic cereal prices.

Cereal import requirement in the marketing year ending in October 2004 (mostly rice and wheat) is forecast at 223 000 tonnes. More than 450 000 tonnes of cereals are available for export and possible stock build-up in the country.

CAPE VERDE (11 February)

A joint FAO/CILSS Crop Assessment Mission, which visited the country in October last year, estimated production of maize for 2003 – the only cereal grown – at 15 800 tonnes. This level of output is 79 percent above the drought-affected crop harvested in 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 70 000 tonnes, including 30 000 tonnes of food aid.

CHAD (11 February)

Reflecting exceptionally favourable weather and larger area sown, cereal production last year increased by about 18 percent compared to 2002. Aggregate cereal output in 2003 was estimated by an FAO/CILSS mission at a record 1.4 million tonnes, some 200 000 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 0.54 million tonnes and 0.4 million tonnes, respectively. Production of paddy was estimated at 0.14 million tonnes.

The cereal import requirement for the year ending in October 2004, mainly wheat, is estimated at 91 000 tonnes. About 78 000 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.

WFP is currently assisting refugees from Central African Republic and north-western Darfur region of Sudan, currently estimated at about 80 000.

CÔTE D'IVOIRE (11 February)

Due to insufficient rains, conflict-induced population displacement and inadequate availability of agricultural inputs, cereal output in 2003 has declined for the second consecutive year. Aggregate cereal production last year was estimated at 1.4 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.

However, despite these somewhat positive developments, 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 are estimated by the mission at about 1.4 million tonnes, virtually unchanged from last year. Import requirements in rice and wheat are estimated at 0.92 million tonnes and 0.32 million tonnes, respectively. Coarse grain imports are forecast at 160 000 tonnes. The country has a structural deficit in tubers – mostly yams and cassava – that has been estimated for 2004 at about 713 000 tonnes in cereal equivalent.

GHANA (11 February)

Land preparation for the planting of the 2004 main maize crop, to be harvested from July, is underway. Unfavourable weather during the 2003 growing season resulted in a decline of the aggregate cereal crop, estimated at 1.69 million tonnes (including rice milled) lower than the previous year. Cereal imports in 2004, mainly wheat and rice, are estimated at some 516 000 tonnes, mainly covered by commercial imports.

The crises in Côte d'Ivoire and Liberia have resulted in 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* (17 February)

Despite localized floods, weather during the 2003 growing season has generally been favourable. Thus, output from the 2003 cereal harvest, mostly rice, is currently estimated at an average level of about 1 million tonnes, fractionally less 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 refugees from Liberia and Côte d'Ivoire estimated at some 90 000, including estimated new arrivals of 15 000 Ivorian and Liberian refugees.

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 (11 February)

Aggregate cereal production in 2003 has been estimated by a CILSS Crop Assessment Mission at 162 000 tonnes, 7 percent higher than the above-average crop of the previous year. This increase is entirely due to larger harvests of millet and maize. 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 70 000 tonnes, including 6 000 tonnes of food aid.

LIBERIA* (11 February)

The paddy crop, virtually the only cereal grown in the country, is due for planting beginning in April. 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. Aggregate cereal imports in 2004 are estimated at 183 000 tonnes; food aid is estimated at 40 000 tonnes.

It has been estimated that, since October 2003, more than 10 000 Liberian refugees in Sierra Leone have spontaneously returned to their war-torn country. Thousands of others among the 320 000 refugees living in other countries of the sub-region have also started to return home.

With the improvement of the security situation, WFP, which had launched a wide 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. Emergency food was also distributed recently to 72 000 children in schools in Margibi and in the city of Tubmanburg for the first time since early 2002. In February a total of 325 000 IDPs are expected to benefit from WFP food aid assistance.

A two-day international donor conference recently held in New York pledged US\$520 million for a World Bank-backed reconstruction programme to rebuild Liberia's essential infrastructure over the next two years.

MALI (11 February)

A joint FAO/CILSS mission which visited the country in October 2003 estimated aggregate cereal production 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. Reflecting this

outstanding 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 (21 February)

Aggregate cereal production in 2003 has been provisionally estimated by a joint FAO/CILSS Crop Assessment Mission at 195 000 tonnes, some 68 percent higher than in 2002 and sharply higher than the average for the previous five years. This bumper crop comes as the first after three consecutive drought-reduced harvests that resulted in near-famine conditions in several regions.

The desert locust situation continues to deteriorate. Considerable damage to crops is reported in some areas of the north and north-west where hopper bands are present within a large area. Aerial and ground control operations are underway.

Cereal import requirements for the 2003/2004 marketing year (November/October) are forecast at about 305 000 tonnes, mostly wheat. This volume includes 15 000 tonnes of wheat for re-export.

NIGER (11 February)

Favourable weather conditions, larger area sown and adequate availability of agricultural inputs resulted in increased cereal production for the third consecutive year. A FAO/CILSS Crop Assessment Mission estimated aggregate cereal production in 2003 at a record 3.6 million tonnes, some 8 percent more than the bumper crop harvested in the previous year. Output of millet, by far the most important crop, increased by 240 000 tonnes to 2.81 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. To support cereal prices on local markets, donors are strongly urged to use local purchases and triangular transactions for their aid programmes.

Notwithstanding the good harvest, a total of about 360 000 tonnes of wheat, rice and maize, for which the country has a structural deficit will need to be imported, in the marketing year 2003/04 (November/October),.

NIGERIA (11 February)

Land preparation is underway in the south for the sowing of the main maize crop due to start from March with the arrival of the rains. Production of cereals in 2003 is tentatively estimated at more than 25 million tonnes, larger than the output in previous year reflecting generally favourable growing conditions. The overall food supply position is stable. Imports of cereals in 2003, mostly wheat and rice, are estimated to decline somewhat from 4.3 million tonnes imported in previous year.

SENEGAL (11 February)

A joint FAO/CILSS Crop Assessment Mission estimated the 2003 aggregate cereal production at 1.6 million tonnes, double the previous year's poor harvest and 73 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 71 percent to 445 000 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 7-fold to 0.52 million tonnes.

Production of beans, sesame and watermelon also increased significantly. Prices, which have been decreasing since the beginning of the harvest, are expected to continue their downward trend as

supply increases. Opportunities for maize exports to the coastal countries and north Africa should be explored.

SIERRA LEONE* (11 February)

Below-normal rains and dry spells during the 2003 growing season adversely affected the recently harvested paddy crop, which is currently estimated to have declined compared to the previous year's good harvest. The 2004 cereal crop, mostly rice, will be sown from April for harvest from September. Cereal imports in 2004, mostly rice, are estimated at some 320 000 tonnes, compared to 308 000 tonnes imported last year.

The security situation in the country remains calm. Repatriation activities continue for the Sierras Leonean refugees returning from Guinea. WFP, which is currently supporting a total of some 84 000 beneficiaries, anticipates that about 12 000 people will return in 2004, although so far less than 1 000 have signed up to leave Guinea.

THE GAMBIA (11 February)

A joint FAO/CILSS Crop Assessment Mission provisionally estimated cereal production in 2003 at a record 208 000 tonnes, an increase of some 45 percent over the previous year's poor crop and markedly above the average of 157 000 tonnes for the preceding five years.

Output of groundnut, the main source of cash income for rural households, was estimated to have increased 79 percent to 128 000 tonnes. Reflecting these good crops, the food security situation in 2004 is expected to improve. However, in districts affected by floods and grasshopper infestations, a number of households may experience food difficulties during the year.

TOGO (11 February)

Land preparation for the sowing of the first maize crop is underway in the south. Following generally good climatic conditions, aggregate cereal production in 2003 is estimated at 0.82 million tonnes, some 10 percent more than 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 0.53 million tonnes. Markets are well supplied and the overall food supply position is satisfactory.

Cereal imports in 2004, rice and wheat, are anticipated at about 180 000 tonnes, including re-exports.

CENTRAL AFRICA

CAMEROON (11 February)

The sowing of the first 2004 maize crop, due for harvest from July, will begin soon in the south. 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 crops, both 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 previous year. Food aid in rice is estimated at 2 000 tonnes.

CENTRAL AFRICAN REPUBLIC (11 February)

Cereal output in 2003 is expected to have decreased for the second consecutive year to an estimated 117 000 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. In September, heavy rains in the north-eastern town of Sibit caused considerable casualties and damage to crops and livestock.

Imports of cereals in 2004 are tentatively estimated at some 41 000 tonnes, slightly higher than last year's requirement.

It is estimated that more than 230 000 people have been displaced from their homes, including 41 000 who have taken refuge in Chad.

CONGO, DEMOCRATIC REPUBLIC OF* (13 February)

In the Democratic Republic of Congo (DRC), although there remain serious security hazards including armed conflicts in certain parts of the country, the overall security situation has improved since the arrival of UN peacekeepers in early September, leading to improved food aid distribution to internally displaced persons and returning refugees. Songolo and Iga-Barriere towns, around the district capital of Bunia in the northeast, are among those reached by humanitarian agencies, which have reported the nutritional situation of the population as very poor. Growing instability in Katanga, in the south-eastern part of DRC, has been reported.

CONGO, REP OF (11 February)

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.

WFP is facing a serious shortfall in resources and shifting its programme to focus more on needed emergency assistance to the most vulnerable groups (IDPs, returnees and malnourished households), while continuing to participate with other partners in rehabilitation operations as long as resources are available.

EQUATORIAL GUINEA (11 February)

The country does not produce significant quantity of cereals. The staple food are sweet potatoes, cassava and plantains. Normally it imports 10 000 tonnes of wheat and 5 000 tonnes of rice.

GABON (11 February)

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 (11 February)

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 4 000 tonnes.

**EASTERN
AFRICA**

BURUNDI* (13 February)

Rainfall in Burundi in general has been satisfactory for the 2003/04 main agricultural season, resulting in normal growth for the main-season crops planted in September–October 2003; these will be harvested early this year. Some hail damage in hilly areas in Ruyigi province and outbreaks of animal diseases in Mwaro province were reported in late 2003.

The preliminary results of a crop assessment organized by the government and international agencies in January 2004 has estimated food production (cereals, legumes, roots and tubers, and banana and plantain) of first season crops in 2004 at 1.1 million tonnes, about 2 percent higher than last year. It should be noted, however, and taking population growth into consideration, per capita food production has declined over time. The marked decline in pulse production has reduced an important source of dietary protein, leading to concerns over nutritional status of the population.

At a forum held in Brussels on 13-14 January, donors pledged over US\$1 billion for specific development projects over a period of three years. The overall security situation has improved except in some localized areas. According to the above-mentioned assessment, food aid of approximately 90 600 tonnes will be needed for the year 2004.

ERITREA* (11 February)

An FAO/WFP Crop and Food Assessment Mission that visited Eritrea late last year found that the 2003 agricultural season was characterized by erratic rainfall (started late and stopped too early with long dry spells, occasional torrential rains and hailstorms), although the total seasonal *kremti* rainfall was about average in most areas. The Mission estimated the 2003 cereal harvest at about 106 000 tonnes, which is almost double the 2002 crop, but still only 57 percent of the annual average amount of cereal harvested during the past 11 years.

The cereal import requirement for 2004 has thus been estimated at 478 000 tonnes, setting the estimated domestic availability of 136 000 tonnes against the estimated total utilization requirement of 614 000 tonnes. Given the precarious foreign exchange situation, it is anticipated that only 30 000 tonnes of cereals can be commercially imported for consumption in 2004. With about 31 000 tonnes of cereals in stock or in pipelines as food aid, the uncovered cereal deficit – for which international assistance is needed – amounts to 417 000 tonnes. An estimated 1.9 million people are currently in need of food assistance.

The Mission observed that the condition of the livestock was good but livestock diseases – particularly CBPP (Contagious Bovine Pleuro-Pneumonia), lumpy skin disease and SRR (Small Ruminant Rinderpest) – were spreading. The government is taking steps to combat these diseases, but much more needs to be done to successfully protect livestock.

ETHIOPIA* (11 February)

An FAO/WFP Crop and Food Supply Assessment Mission which visited the country in late 2003 estimated total cereal and pulse production in 2003/04 at about 13.3 million tonnes, comprising 13.05 million tonnes from the *meher* harvest and a predicted 300 000 tonnes from the *belg* harvest in 2004. At this level, cereal and pulse production is about 46 percent above

the 2002/03 post-harvest estimates and 11 percent above the average for the past five years. As a result, cereal imports in 2004 are estimated at about 210 000 tonnes, with commercial imports forecast at 50 000 tonnes and food aid in pipeline and pledges currently amounting to 160 000 tonnes.

Despite the bumper harvest, an estimated 7.2 million people will require food assistance, while 2.2 million more will require close monitoring. The population in need of assistance varies from month to month and numbers peak in mid-year. Relief food requirements for 2004 are estimated at about 980 000 tonnes, mainly for general ration distribution but also including food for supplementary rations and food for emergency school feeding. Part of the requirements could be met with cash provided directly to beneficiaries as "cash-for-relief" or "cash-for-work".

There are around 5 million people in Ethiopia who are chronically food insecure, and even in a good year they rely partially on food aid to meet their minimum food needs. The government, in conjunction with the international community, is developing a programme for meeting and ultimately alleviating the recurring needs of the food-insecure population.

KENYA (11 February)

Prospects for the 2003/04 secondary "short rains" cereal crop, for harvest from February to March 2004, are poor because of inadequate rainfall. Some unusual rain in January has provided limited relief for water supplies and pasture, but they came too late to support crop production. This "short rains" crop provides the main source of food in parts of Central and Eastern provinces and accounts for some 15 percent of total annual production. The output of the 2003 main "long rains" cereal crop estimated at nearly 2.2 million tonnes and harvested through August to November 2003 was about average.

Maize prices over the past few months decreased from their peak in June/July 2003, but they are generally higher than the comparable period in 2002. For instance, maize prices were 20 to 30 percent higher in December 2003 compared with the same time the previous year in most major markets.

In the pastoralist areas of northern and eastern Kenya, mainly Garissa, Ijara, Wajir, Mandera and Tana River, pasture and water conditions have improved due to favourable short-rainfall season. By contrast, pastoralists in western parts of the country have continued to suffer from consecutive poor seasonal rains, including the current season. The worst-affected districts include Marsabit, Turkana, Kajiado, Baringo, and some areas of Isiolo, Narok and Laikipia.

The Government of Kenya has recently distributed food assistance to an estimated 1.2 million people. A more rigorous assessment to identify the worst affected areas and people is expected to be carried out by the Kenya Food Security Steering Group.

RWANDA (13 February)

In Rwanda, the 2003/04 main season started with normal to erratic rains. However, following favourable rainfall subsequently, crops are settled at this stage in most parts of the country. The important bean crop is harvested from December providing a supplementary source of food. Total 2003 cereal production, estimated at 271 600 tonnes, was well below 2002 production but higher than the average of the last five years. There still remains a sizable food deficit requiring a projected food aid of about 30 000 tonnes of cereals.

SOMALIA* (11 February)

Prospects for the current 2003/04 secondary *deyr* season cereal crops are favourable following near normal rainfall in southern Somalia. Good fodder production is also forecast in southern agro-pastoral areas. The Food Security Assessment Unit (FSAU) puts its preliminary estimates

of planted cereal area in the current *deyr* season at about 286 000 hectares, with a concomitant cereal production forecast of about 147 000 tonnes, about 48 percent above the post war average.

However, serious humanitarian concerns have emerged in several areas of northern and central regions of Somalia as the result of the cumulative effects of successive droughts. Widespread loss of livestock and other livelihoods, along with severe water scarcity, have been reported, with a large number of people in need of urgent food and other humanitarian assistance. Grazing and water options are increasingly limited due to below-normal vegetation and outbreaks of civil insecurity in Central Somalia. FSAU has recently reported that drought in northern parts of the country has now extended to include the greater parts of Sool, as well as Bari, Nugal and Mudug. A number of interventions in place are aimed at maintaining the nutritional status of the children. Monitoring of all areas has intensified.

The security situation has also worsened in several parts of the country including Mogadishu, Hiran and the Sool-Sanag area. In response to the severe drought in the Sool plateau, WFP recently distributed 732 tonnes of food to about 13 000 most vulnerable households. A tense security situation, however, has affected further food distribution. Overall, some 350 000 IDPs and poor urban dwellers, together with about 230 000 rural people, are estimated to be chronically food insecure.

SUDAN* (11 February)

An FAO/WFP Crop and Food Supply Assessment Mission, which visited the country in October/December 2003, found that generally favourable growing conditions have resulted in a record cereal crop in 2003/04, forecast at about 6.3 million tonnes, comprising 5 million tonnes of sorghum, 784 000 tonnes of millet, 356 000 tonnes of wheat (to be harvested in April/May 2004), 107 000 tonnes of maize and 35 000 tonnes of rice. At this level, cereal production is 63 percent larger than last year's crop and about 47 percent above the average of the previous five years. Livestock throughout the country are generally in good condition; with the expected national surplus of grain and declining prices, the terms of trade for pastoralists have markedly improved.

The overall food situation is therefore highly favourable: there is the possibility of increased food availability and access for a large number of vulnerable groups. Large quantities of grain could also be exported, provided that export markets are secured, particularly in some neighbouring countries. It is also essential that the Strategic Reserve Authority for north Sudan replenish its stocks in a timely manner in order to ensure that prices do not fall below the cost of production.

Despite these positive developments, an estimated 3.6 million people in the Sudan will need food assistance amounting to about 249 000 tonnes. The escalating civil conflict in the three Darfur states has already induced the massive displacements of over a million people, and access to food has been sharply curtailed. People have lost the majority of their current harvest; if the conflict is not resolved in the next few months, it is highly probable that they will also miss the upcoming planting season and thus lose next season's harvest as well. Preliminary analysis shows that about 400 000 IDPs and 110 000 refugees will be returning to their places of origin or choice in Sudan during the first 12 months of the implementation of the peace agreement. These individuals are currently not covered by any WFP assistance, but it is expected that they will require food aid en-route, return packages and community based assistance at their places of return.

TANZANIA, UNITED REPUBLIC OF(11 February)

Harvesting of the 2003/04 short *Vuli* season cereal crops in the bi-modal rainfall areas is almost complete. The overall outlook is poor due to inadequate rainfall. In a few of the highland areas in Kilimanjaro Region, crops such as maize and beans were reported to be in good condition.

The aggregate 2003/04 production of cereals has been forecast at about 4 million tonnes, about 11 percent below the previous marketing year and 5 percent below the average for the previous five years. Below normal rains have also affected pasture conditions and raised alarms concerning livestock productivity. However, recent rains have raised hopes for some recovery.

Reflecting low supply, maize prices continued to rise in several markets, aggravating the food-security situation of a large number of people. Sharp increases in maize prices were noted particularly in the southern highlands and central Tanzania.

Serious food shortages were reported in several regions, including Dodoma, Shinyanga, Singida, Manyara, Lindi, Coast and Morogoro. Also, there are pockets of food insecurity in Tanga, Kilimanjaro, Arusha, Mwanza, Mara and Tabora Regions, where crops failed due to drought. The Food Security Information Team (FSIT) and WFP prioritized 24 districts in 10 regions to receive available food aid, which is expected to be sufficient for only 2 to 3 months between December 2003 and February 2004.

UGANDA (11 February)

Harvesting of the 2003/04 second season food crops is almost complete. Prospects are generally favourable, reflecting good rains overall. Recent unseasonable rainfall has also replenished pasture and water in several parts. The output of the main season crop, harvested last summer, was about average.

The overall food supply situation is stable. However, average prices of food commodities continue to be generally higher compared to last year. Insecurity in northern and eastern Uganda continues to claim the lives of civilians. Food distribution by WFP are estimated to reach over 1.4 million displaced persons, 160 000 refugees and other vulnerable persons.

SOUTHERN AFRICA

ANGOLA (13 February)

Near-normal rains at the start of the 2003/04 agricultural season have resulted in a fair crop emergence in most of the grain producing areas of the country. However, with subsequent erratic and generally insufficient precipitation, and heavy downpours in late-January that caused flooding in riverbeds, crop growth has been less than satisfactory in the southern and central parts of the country where the main maize growing areas are located. Cassava areas in the northern and eastern parts of the country are expected to perform better. At this stage the overall crop prospects for the season are uncertain. Nearly 2 million farmers were targeted for emergency agricultural assistance.

With the improvement in the security situation, large numbers of internally displaced persons (IDPs) and refugees have returned to their areas of origin. Even though the 2003 cereal output was above average, it can meet only half of the country's total cereal requirements. The recent Vulnerability Analysis conducted by WFP points to about 1.2 million vulnerable people with more than 500 000 of them currently food insecure and need immediate food assistance.

BOTSWANA (13 February)

The country is experiencing a severe drought this year. The beef export industry is struggling to recover following droughts and two outbreaks of foot and mouth disease in last three years. The 2003 cereal production, mainly sorghum, was sharply reduced from the year before due to dry weather. Consequently import requirements have increased substantially. However, the country normally covers most of its consumption requirements on commercial basis.

LESOTHO* (13 February)

Although early-February rains brought some temporary relief from the prolonged dryness, severe drought is developing due to delayed and below-normal precipitation. The food supply situation, especially during these lean months, remains very tight due to below-average cereal production in 2003 and the total failure of winter crops. The Prime Minister of the country declared a state of emergency on 11 February 2004 on account of this drought, appealing 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. FAO and WFP are currently (8-26 February 2004) undertaking a mid-season rapid assessment of the current agricultural season.

MADAGASCAR (13 February)

Normal rains have led to the establishment of the main season food crops throughout the island except in the southern and north-eastern parts where a prolonged dry period early in the season has adversely affected plantings and crop growth. Some precipitation in late December/early January was received in the south but it was deemed insufficient to help crops. The south had also experienced drought in 2003 which severely reduced maize production. According to the U.S. Climate Prediction Centre, over the first week of February, much of the island received heavy rains with some areas receiving over 100 mm. Thus, the prospects for the maize crop are uncertain at this stage. The estimated production of paddy, the main staple crop in the country, in 2003 was 2.8 million tonnes, about 10 percent more than the average of the previous five years. Current reports point to an increase in the number of severely malnourished children. There is an urgent need for additional food aid contributions to prevent a further deterioration of the nutritional situation during the lean season that started in September.

MALAWI (13 February)

Most of the country experienced a delayed start of the season with the northern and central parts receiving near-normal and the south receiving much below normal cumulative rainfall. To help boost national crop production, the Government has implemented the Targeted Input Programme (TIP). An FAO/WFP Crop and Food Supply Assessment Mission last April had estimated total cereal production for 2003 at 2.1 million tonnes, about the same as the five-year average. Nevertheless, it was estimated that 400 000 people will need food assistance, including local purchases, of about 30 600 tonnes in 2003/04 (April/March) marketing year, including those that experienced crop failures and those seriously affected by HIV/AIDS. However, a recent Government estimate, unconfirmed by UN agencies, puts the number of people requiring food assistance at 3.5 million and consequently the government food marketing agency, Agricultural Development and Marketing Corporation (ADMARC) has begun distributing maize from the Strategic Grain Reserves (SGR) at subsidized prices.

MAURITIUS (13 February)

Domestic production of cereals amounts to only about 2 000 tonnes. Consequently, the country virtually imports its entire cereal consumption requirements commercially.

MOZAMBIQUE (13 February)

Northern areas have experienced favourable rainfall benefiting the country's main maize, sorghum and cassava cropping zones. Although central areas have received some rains, vegetative growth remains below normal. The southern areas have received cumulative rainfall of less than 50 percent of normal level thus leading to drought-like conditions affecting crop growth and livestock condition adversely. Consequently the national crop prospects at this stage are highly uncertain.

The 2003 cereal production, estimated at 1.8 million tonnes (some 3 percent above the good harvest of the previous year), shows a continuation of steady recovery in agricultural production over past several years. However, the country as a whole faces a deficit of about 744 000 tonnes of cereals particularly in the south and parts of the centre. A recent estimate by the Vulnerability Assessment Committee shows that 659 000 people are in need of food assistance. So far, WFP was able to bring food relief to only a part of the needy population.

NAMIBIA (13 February)

In Namibia, 2003 production was estimated at 102 000 tonnes, 38 percent above the reduced level of 2002. The first half of the rainy season (October-December 2003) has been satisfactory. However, as a result of the delayed and below-normal rainfall in parts of the country (e.g. the northeast), the Government has issued an appeal for emergency agricultural assistance. The government will be able to import food commercially to make up for the shortfall. Food distribution is already ongoing from the programme which the Government started during the previous drought situation. WFP will supplement these efforts by targeting about 114 000 orphans and other vulnerable children.

SOUTH AFRICA (13 February)

Although widespread rains fell in the northeast bringing some relief from dryness, this year South Africa is experiencing the worst drought in ten years in seven out of nine provinces, namely, Limpopo, KwaZulu-Natal, Northern Cape, Free State, Mpumalanga, North West and Eastern Cape, affecting as many as 15 million people. The winter wheat output harvested in December 2003 is estimated at 1.43 million tonnes, almost 38 percent below the previous year's harvest. Maize plantings this season are down by about 20 percent. South Africa is the sub-region's largest supplier of cereal grains. However, according to some estimates in 2004 production of maize may even fall short of the country's domestic needs. 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. The situation needs to be monitored closely.

SWAZILAND (13 February)

In Swaziland, the corridor extending from the Lavumisa border post with South Africa to the southeast is experiencing a severe drought this year, although early-February rains brought some temporary relief from the prolonged dryness. The prevalence of HIV/AIDS is exacerbating the already fragile food security situation of the vulnerable population. 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. The FAO/WFP Mission of April/May 2003 estimated that 217 000 people would face food shortages and would need food assistance equivalent to 24 000 tonnes of cereals as two-thirds of the population live below the poverty line. FAO and WFP are currently (8-26 February 2004) undertaking a mid-season rapid assessment mission of the current agricultural season.

ZAMBIA (13 February)

Favourable rainfall over the northern half of the country has been conducive for the main-season crops planted in recent months. Rainfall has been below normal for areas in the south and in the northeast. The Government has encouraged increased plantings and fertilizer use through its extended input subsidy programme to help boost food production. At this early stage, the overall prospect for the season is considered good. The 2003 cereal production was estimated at 1.36 million tonnes, some 83 percent higher than the reduced harvest of the year before and 35 percent above the average of the past five years. Cereal import requirements are limited to reduced quantities of wheat and rice in which the country has a structural deficit but are met through commercial imports.

In order to stabilize maize prices in the country, the Government has lifted the ban on maize exports and plans to replenish the country's strategic reserves by procuring 206 000 tonnes of maize domestically. However, specific areas in the south and west of the country, where the harvest was poor, require targeted food assistance in 2003/04. This can be acquired primarily through local purchases.

ZIMBABWE* (13 February)

The central and south-eastern parts of the country have received the highest amount of cumulative rainfall since the start of the current agricultural season in October. Crops in eastern and the northern parts of the country are affected by the below normal precipitation. Farmers have been facing seed, fertilizer, fuel, spare parts and draught power shortages which may have led to the use of sub-standard planting material and reduced planted area. According to the National Early Warning Unit, the area planted to maize this year is estimated at 1.21 million hectares, about 12 percent below last year's plantings.

The estimate for the wheat harvest in November-December 2003 has been put at 126 000 tonnes, better than the early forecast of 90 000 tonnes, but much below last year's and the five-year average levels of production. However, this has little impact on the overall food balance. An FAO/WFP Crop and Food Supply Assessment Mission in May estimated the 2003 cereal production at 1 million tonnes, including forecast for the winter wheat and barley crops. At this level, production is 46 percent higher than the poor level of last year but still well below average. The cereal import requirement for 2003/04 is estimated at 1.3 million tonnes, of which maize accounts for 980 000 tonnes. In spite of an increase in cereal production domestic production cannot even cover half of the country's cereal requirements in 2003/04. Escalating inflation, currently in the order of 600 percent per annum, is further eroding the purchasing power of the already low levels of income, thus greatly limiting access to food for the most vulnerable population estimated at 5.5 million. The country received pledges of about 277 250 tonnes of food (about 80 percent of the appealed amount) by late January 2004 while total cereal food aid needs for the year are estimated at 610 000 tonnes. The Government is slowly releasing maize grain for distribution out of its 240 000 tonnes of locally purchased stocks.

ASIA

AFGHANISTAN* (10 February)

Latest reports and satellite imagery indicate significantly high precipitation throughout the country and snow cover over the mountains. This year the southern parts of the country have also received improved precipitation, after below-average levels last year. The high levels of precipitation and relative peace in the northern areas has prompted farmers to plant marginal lands and pastures with cereals, raising environmental concerns. It is too early to predict the aggregate harvest for this year, but there are good signs indicating that it will nearly match last year's record cereal harvest of about 5.5 million tonnes. Aggregate import requirements for the current marketing year (July/June) are estimated at 506 000 tonnes, including 114 000 tonnes in food aid.

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 (6 February)

Latest official reports indicate that similar areas have been planted with winter cereals for harvest in 2004 compared with the past couple of years. Aggregate area under winter cereals this year is estimated at 116 000 hectares, almost all of which is winter wheat. Winter crops are reportedly in satisfactory condition, and ample snow cover to provide the required soil moisture during the critical months of spring and early summer appears to be present. Provided favourable weather conditions persist, Armenia should match its good 2002 cereal harvest. Despite the good harvest, the country relies on commercial imports and some food aid to meet domestic cereal requirements. Cereal import requirements for the current marketing year have been estimated at 161 000 tonnes, including 50 000 tonnes of food aid.

AZERBAIJAN (6 February)

The latest reports point to favourable weather conditions and adequate availability of inputs, which have enabled farmers to maintain the large areas planted with winter cereals over the past couple of years. The aggregate area planted with winter cereals has been estimated at 752 000 hectares, including 630 000 hectares of wheat and 122 000 hectares of barley. Crops are reported to be in satisfactory condition. Provided favourable weather conditions persist, the country will be able to match the relatively good harvest of 2003. Azerbaijan is, however, a food-deficit country and on average needs to import substantial quantities to meet its domestic requirements. The aggregate cereal import requirement during the current marketing year (July/June) has been estimated at 512 000 tonnes of mainly food-quality wheat from Kazakhstan.

BANGLADESH (10 February)

The main crops presently in the ground are wheat and irrigated *boro* rice planted from late-November to January and harvested beginning in mid-April. This rice crop accounts for almost 45 percent of total annual rice production. The aggregate paddy production in 2003 has been estimated at a record 39.9 million tonnes largely because of a good Aman crop harvested in December. This level of production would be 4.5 percent higher than for the previous year, and 13 percent more than the average for the preceding five years. The wheat output in 2003 has been estimated as close to last year's level.

Reflecting an adequate level of government-held food grain stocks and good harvest prospects, the overall food supply situation is good. However, the malnutrition rate in Bangladesh is among the highest in the world, and a sizeable proportion of the population is vulnerable to food shortages, especially in the northern districts, where at least 24 people reportedly died of starvation-induced diseases in September and October 2003. Import requirements in the marketing year ending June 2004 are expected to reach 2.3 million tonnes.

CAMBODIA (10 February)

The harvesting of the country's main wet rice crop, which accounts for some 80 percent of rice production, has been completed. The second paddy crop (dry season) is presently in the ground with normal rainfall and temperature conditions. The 2003 aggregate paddy output is estimated at a record high, 4.2 million tonnes, some 10 percent higher than the previous year and 8 percent more than the average of the past five years, mainly because of favourable weather conditions. The government is carrying out an irrigation system upgrade through a food safety assistance project financed by the Italian Government and implemented by FAO in key areas. Rice, which accounts for some 84 percent of annual food crop production, is planted in about 90 percent of the cropped area, mainly in the Central Mekong Basin and Delta, and the Tonle Sap Plain.

CHINA (10 February)

Mainland China's grain area (rice, wheat and maize) has been declining by 2.8 percent annually since 1998, and even more for wheat (5 percent) due to urbanization and government agricultural policies. Wheat output in 2003 declined to its lowest level since the mid-1980s with the area reduced to the lowest level since 1950. Maize output for 2003 was some 7 million tonnes lower than in 2002, and rice some 8.8 million tonnes lower compared to last year's level. The steady decline in output has forced the government to draw from state-held stocks to meet domestic demand. The government recently has set the 2004 target of grain output which is 20 million tonnes more than that of 2003 grain output.

Wheat production declined in 2003 for the fourth year in a row to 86 million tonnes, some 5 percent below 2002 and 15 percent below the average of the past five years. The decline is mostly attributed to the reduction of wheat planting areas. The sowing of winter wheat due for harvest in May and June 2004 has been completed, and the area planted is estimated to have declined slightly from last year. The condition of most of the wheat crop in the northern China plains is normal, and the recent cold weather has not significantly affected crops in dormancy.

The harvesting of maize in China was completed last November. The estimate for maize output has not changed from the last estimate of 114 million tonnes, some 6 percent below 2002 and 5.4 below the average of the previous five years.

To date, 14 of the 31 provinces in Mainland China have confirmed or suspected outbreaks of the avian influenza virus, which has reduced domestic demand for animal feeds such as soy meal and maize. More than 1.2 million chickens have been destroyed. So far 98 000 fowl have been destroyed on farms infected with the virus in Taiwan.

CYPRUS (11 February)

Sowing of the 2003/04 wheat and barley crops for harvest beginning in May 2004 has been completed. Production of barley in 2003 has been revised to 86 000 tonnes, slightly below the average of the previous five years. Imports of cereals in 2003/04 (May/April), mainly wheat and barley, are forecast at the previous year's level of some 645 000 tonnes.

GEORGIA* (6 February)

Latest reports indicate that the total area planted with winter cereals (for harvest later in 2004), estimated at 190 000 hectares, has increased by 69 000 hectares over last year, owing mainly to favourable weather conditions. Wheat is the most important winter crop, which has been planted on about 180 000 hectares this year. Maize is the most important spring crop planted on average on more than 200 000 hectares annually. Georgia is a food-deficit country and depends on imports to meet consumption requirements, even in good harvest years. If the favourable weather conditions persist, aggregate cereal harvest should match the relatively good harvest of the past two years.

WFP is currently assisting some 209 500 people with a total of 50 493 tonnes of food under the Protracted Relief and Recovery Operation (PRRO), which began in April 2003 and is scheduled to continue until the end of March 2006.

INDIA (10 February)

In India, the sowing of the winter wheat crop for harvest in 2004 has been completed. The area planted has been estimated at least 700 000 hectares higher than last year's 25.3 million hectares, obviously a recovery from last year's drought-affected reduced plantings. Most of the increase in planted areas has been in Rajasthan and Madhya Pradesh. The *rabi* crop is expected to be better this year as soil moisture levels have increased after good monsoon rains that lasted from June to September. The cool temperatures and winter rains are providing favourable growing conditions for wheat.

The estimate of 2003 maize output in India has been increased by 1.7 million tonnes to 14.7 million tonnes. This is 32.3 percent higher compared with the drought-reduced output in 2002 and 25.3 percent above the average of the previous five years, and reflects a combination of larger planted area and favourable rainfall.

INDONESIA (10 February)

Indonesia failed again to meet the government's paddy production target in 2003, producing only 51.85 million tonnes of paddy rice because of both smaller planted area and prolonged drought conditions in Java. Import requirements for 2003/04 stand at some 3 million tonnes.

Harvesting of the 2004 main paddy crop will start in March. Production is forecast at 50.68 million tonnes. In order to protect farmers during the current harvest season, the Ministry of Trade and Industry has recently imposed a temporary ban on the importation of rice starting 20 January until the end of June 2004. The new policy applies to a wide range of rice categories (rough, brown, fragrant, PB and whole) but excludes paddy for sowing seeds.

A devastating flash flood last week, triggered by heavy rains and deforestation, hit Bahorok in the sub-district of Langkat in early November; it was reported that 245 people were killed or buried alive and 1 300 displaced. Overall, the flash flood washed away 402 houses and heavily damaged one hotel, six cottages, 280 kiosks and 20 community houses.

Powerful earthquakes have hit Papua Province. The severest earthquake, measuring 6.9 on the Richter scale, struck on 6 February, followed by a number of powerful aftershocks (6.2 on Richter) on the next day and 7 February (5.3). Hundreds of people were killed and injured in the quake and many buildings and infrastructures in the area were destroyed.

So far, some 4.7 million chickens have been killed because of the avian flu epidemic.

IRAN, ISLAMIC REPUBLIC OF (10 February)

Wheat output for 2003 has been estimated at a record level of over 13 million tonnes, 0.5 million tonnes up from last year's bumper crop, and 2.8 million tonnes more than the average of the previous five years, as a result of favourable weather and a substantial increase in financial support to agriculture from the Government. Currently the main crops in the ground are wheat and barley. The harvesting of barley will begin in March, while that of wheat will commence around May/June. The prospects for the current crop are favourable reflecting good rainfall and a lucrative price for local producers.

According to the latest official statistics, some 41 000 people died as a result of the earthquake in Bam last December. The findings of a recent FAO mission indicate that the earthquake in Bam region has seriously affected the agricultural sector, which employs over 25 percent of the district's total population of 230 000. The traditional irrigation infrastructure, water channels, several wells, grain storages and other facilities were all seriously damaged. About 650 livestock shelters were destroyed and significant numbers of livestock have been reported lost, potentially affecting the milk supply and livelihood of most farmers.

Food assistance to earthquake victims, 100 000 most vulnerable people, has been provided by WFP.

IRAQ* (11 February)

Despite improved precipitation in the region, prospects for the 2004 winter grain crop in Iraq 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 (milled), about 22 percent above the previous year's output.

Planned cereal imports in the marketing year 2003/04 (July/June) are estimated at 3.44 million tonnes. The Public Distribution System (PDS) provides food for the entire population of approximately 26.3 million Iraqis. While starvation has been averted, chronic malnutrition problems persist especially among vulnerable groups including children and mothers because of a lack of nutrition diversity. A marked improvement in the nutritional well-being of the population will require a substantial flow of resources into rehabilitation of the agriculture sector and the economy as a whole. Although there is potentially enough food and sufficient food diversity from imports and domestic agriculture, access to nutritious food remains a problem as over half of the population lacks the buying power to obtain a proper diet on a regular basis.

ISRAEL (11 February)

Early prospects for the 2004 wheat and barley crops, to be harvested beginning in April, are favourable so far, reflecting improved precipitation. Domestic production of wheat in normal years covers less than one-fifth of the country's total requirement, while the rest is commercially imported. Aggregate production of wheat and barley in 2003 – estimated at 176 000 tonnes – was slightly lower than in the previous year. Imports of cereals in 2003/04 (July/June) are forecast at about 2.9 million tonnes.

JAPAN (10 February)

The main rice crop that was sown in May–June 2003 was harvested in October–November; the wheat crop sown in September–October will be collected in June–July 2004. The 2003 paddy output has been estimated at 9.7 million tonnes, the lowest level since 1993, reflecting reduced planting areas and unfavourable weather, including an unusually cool summer.

The import requirement for cereals in 2003/04 (July/June) is estimated at 26.4 million tonnes (coarse grains 19.9 million tonnes, wheat 5.9 million tonnes, rice 0.7 million tonnes). The Japanese Government has agreed to keep the government rice production target for 2004 unchanged from 2003 at 8.54 million tonnes.

JORDAN (11 February)

Sowing of the 2003/04 winter crops was completed last December under generally normal weather conditions. Favourable rains and snow in January helped improve soil moisture.

Aggregate production of wheat and barley in 2003 was estimated at 120 000 tonnes, more than double the average of the previous five years, but similar to the 2002 crop. 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 the previous year. Coarse grain imports are forecast at 900 000 tonnes, about 100 000 tonnes higher than in 2002/03.

KAZAKHSTAN (6 February)

Latest reports indicate an increase in areas planted with winter cereals this year to 755 000 hectares compared with 560 000 hectares in 2002/03. Harsh weather conditions in some parts of the country have reportedly compromised some winter cereals, which could result in significantly lower yields. However, much of the failed winter crop area is usually replanted in spring. Spring cereals are the most important crops, accounting for more than 94 percent of the aggregate cereal area. Kazakhstan has emerged as an important supplier in the cereal export market, providing much of the cereal deficit in neighbouring CIS and other countries. Aggregate cereal exports in 2002/03 marketing year were estimated at about 6.2 million tonnes, and estimates for the current marketing year stand at about 6.34 million tonnes.

KOREA, DEMOCRATIC PEOPLE'S REPUBLIC OF* (10 February)

Currently, no main agricultural activities are under way. Winter wheat, one of the main cereals in the Double-cropping programme, which was initiated in 1996 jointly by FAO and UNDP as part of the government framework for agricultural recovery, was planted from the end of September to mid-October, with a significant increase in targeted area from 57 700 hectares last year to 68 500 hectares. Spring barley and potatoes as second-season crops will be sown in March–April, and planted areas in 2004 are expected to remain close to those of 2003 at 34 000 hectares and 98 000 hectares, respectively.

The WFP has estimated that up to 3.8 million North Koreans, 17 percent of the country's population, would be deprived of critical international food aid by the end of the winter because of dwindling international donations.

KOREA, REPUBLIC OF (10 February)

Rice, the country's main cereal, is sown from mid-May and harvested from mid-September. The 2003 paddy crop is officially estimated to be the lowest in a decade at 6 million tonnes, some 9.6 percent lower than the previous year and 14.3 percent below the average of the previous five years. The rice crop was hit by prolonged heavy rains and a very powerful typhoon, Maemi, which severely damaged the southern provinces, the heart of Korea's rice belt. The government's initiative to reduce rice production also contributed towards the record low harvest in 2003.

Most of the country's food needs are met through imports. The import requirement of cereals in the 2003/04 marketing year (October/September) has been estimated at 3.2 million tonnes of wheat, 8.8 million tonnes of maize and 0.3 million tonnes of other grains.

KYRGYZ REPUBLIC (9 February)

The area planted with winter cereals is officially estimated at about 365 000 hectares, which is similar to the area planted in 2003. Winter crops are reportedly in good condition and if the favourable weather conditions persist, average yield may tentatively be estimated at about 3 tonnes per hectare. Aggregate cereal utilization is estimated at about 1.9 million tonnes, whereas production on average reaches about 1.6 million tonnes. The cereal deficit is covered mainly through commercial imports, which are estimated at 187 000 tonnes for the current marketing year (July/June).

LAO PEOPLE'S DEMOCRATIC REPUBLIC (10 February)

The paddy output from the rice crop in 2003 has been estimated at 2.5 million tonnes, an all-time record high that has resulted from expanded rice area and the use of high-yielding varieties.

Planting of 2004 second-season irrigated rice is under way and is expected to be completed by the end of February. This crop accounts for some 15 percent of annual rice production.

LEBANON (11 February)

The sowing of the wheat and barley crops, due for harvest from June, was completed under generally improved weather conditions. Production of cereals in 2003 is estimated at 139 000 tonnes, slightly above average.

Imports of cereals, mainly wheat, in 2003/04 (July/June) are forecast at some 0.78 million tonnes, almost the same as last year.

MALAYSIA (10 February)

Harvesting of the main rice crop, accounting for about 60 percent of total rice production, is under way and should be completed by April. The rest of the production comes from the off-season crop planted in March/April. The output of aggregate paddy rice in 2003 has been estimated at a record 2.4 million tonnes, up some 15 percent from last year and 16 percent higher than the average for the previous five years, reflecting favourable weather conditions. Malaysia is a net importer for major grains. The import requirements of total grains in 2003/04 have been projected at 4.3 million tonnes (1.4 million tonnes of wheat, 0.6 million tonnes of rice, and 2.4 million tonnes of coarse grains).

Incessant rain flooded parts of Johor, Malaysia's main oil palm growing state in January 2004, forcing the evacuation of more than 3 000 people and severely threatening palm oil production.

MONGOLIA* (10 February)

In the northern part of Mongolia (Tuv, Bulgan and Selenge Provinces), the ground is covered by heavy snow. As most animals, especially goats and sheep, cannot forage for pasture in the winter, they depend for survival on stocks of winter feed. The livestock situation is good so far this winter since vegetation cover last summer was relatively good over most of the territory, allowing herders to prepare more livestock feed than in previous years.

Total cereal output in 2003 increased by 26.5 percent from last year and 8.9 percent above the average of the past five years. An increase in yields more than compensated for a decrease in area planted, which resulted from producers' poor financial situation after three years of drought. Many producer had insufficient funds to buy seeds, fuel and farm supplies for the 2003 season.

The 2003/04 total cereal import requirement has been estimated at 248 000 tonnes, accounting for about 63 percent of total domestic consumption. Most of this requirement will be needed from international aid since the country has a serious balance-of-payment problem.

MYANMAR (10 February)

Harvesting of the 2003 main monsoon rice crop and planting of the dry season irrigated crop have been completed. The 2003 paddy output was the highest of the past ten years at 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 as a result of marketing reforms in the rice sector. The Government made a decision in April to halt its involvement in the rice trade and marketing systems. Wheat and maize outputs produced in 2003 are estimated at 100 000 tonnes and 750 000 tonnes, respectively.

As a result of steady increases in paddy production in the past few years, the country has re-entered the world market as a rice exporter.

Since 1 January 2004, rice exports have been banned, for six months, in an effort to lower prices. The ban marks the Government's re-entry into the rice market.

NEPAL (10 February)

The harvesting of rice was completed in December 2003. The output of paddy rice is estimated at 4.16 million tonnes, similar to the previous year. The aggregate output of coarse grains in 2003 is estimated at 1.8 million tonnes, some 3.7 percent below the previous year's bumper crop, but 1.1 percent above the average of the past five years.

PAKISTAN (5 February)

The winter wheat (*rabi*) area planted at the end of October through November 2003, has been estimated higher than the preceding year, reflecting the timely announcement of the support price by the Government, which provided incentive to farmers. Harvesting will start in late March and continue through July; most of the winter wheat is irrigated. The wheat output in 2003 is provisionally estimated at 19.3 million tonnes, some 5.6 percent higher than in the previous year.

Coarse grain output harvested in November 2003, is estimated at 2.1 million tonnes, slightly below the previous year, while paddy rice recovered from 6.9 million tonnes last year to 6.7 million tonnes this year due to favourable weather.

The outbreak of the avian influenza virus in the port city of Karachi has been contained and about 3.5 million birds have been reported as destroyed.

PHILIPPINES (5 February)

The main crops in the ground are the dry season rice (planted in October-December) and maize, which is due for harvest starting from April through May. In most parts of the country, crop conditions are generally normal. In western Luzon, western Visayas and south-western Mindanao however, crops are suffering from moisture deficiency.

Estimates for 2003 paddy rice output have been maintained at 13.5 million tonnes, up by 500 000 tonnes from the previous year, reflecting both government efforts to expand cultivation during the second half of the year to recoup the earlier losses related to El Niño, and increased use of hybrid and higher-yielding varieties by farmers. Paddy rice production target for 2004 is set at 15 million tonnes, some 11 percent higher than that in 2003 and it is planned to achieve this through distribution of high-yielding seeds.

Landslides, triggered by heavy monsoon rains last month, left 154 people dead in Southern Leyte while another 20 people died on the island of Mindanao and 150 000 people affected overall. Infrastructure, agriculture and property were damaged seriously. Some 3 000 people are still in urgent need of shelter and access to clean water after heavy landslides buried their homes in the country last month.

SAUDI ARABIA (11 February)

Growing conditions for the 2003/04 wheat and barley crops due for harvest from April have improved due to recent precipitation. Production of wheat in 2003 is estimated at 1.8 million tonnes, similar to the previous year, which together with stocks, will be sufficient to cover the country's requirements. 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.

SRI LANKA (5 February)

Many parts of Sri Lanka have received low rainfall since September and water levels in major irrigation systems dropped substantially. According to a Government report and preliminary internal mission by a UN country team (FAO/WFP/UNDP), paddy production has been affected by the drought, especially in Badulla, Hambantota, Mannar, Kurunegala, Anuradhapura, Monaragala and Puttalam.

The Maha season paddy crop planted in October-November will be harvested in March report and April 2004. The estimate of paddy output in 2003 remains unchanged from the previous report at an all-time high of 3.1 million tonnes (with 1.9 million tonnes Maha and 1.2 million tonnes Yala) as a result of the improved security situation, rehabilitation of agricultural activities in the North and favourable weather conditions.

The wheat import requirement necessary to meet the domestic consumption needs in 2003/04 is estimated at 950 000 tonnes.

SYRIA (11 February)

Reflecting recent favourable weather conditions, the prospects for the wheat and barley crops to be harvested from May have improved. Production of wheat in 2003 is estimated at an above-average level of 4.9 million tonnes. Barley output rose significantly to 1.1 million tonnes, about 23 percent above the average for the previous five years.

Imports of cereals in 2003/04 (July/June) are forecast at 815 000 tonnes, more than half of last year.

TAJIKISTAN* (9 February)

Latest reports indicate that area planted with winter cereals, estimated at 306 000 hectares, is similar to the significantly increased areas planted in 2002/03. More than 87 percent of this is wheat and about 12 percent is barley. Improved precipitation and ample snow cover has provided ideal conditions for double cropping in the lowlands and marginal lands are increasingly coming under cultivation. Winter crops are reportedly in good conditions and an above average snow cover on the mountains is expected to provide sufficient irrigation water for winter and spring crops. Provided that precipitation in spring and early summer does not drop significantly below average a second crop in much of the irrigated areas will be a real possibility. Even if a record harvest is gathered, Tajikistan will still require some cereal imports to cover domestic requirements. The latter is estimated at just over 1.1 million tonnes. The cereal import requirement during the current marketing year is estimated at 391 000 tonnes, including 103 000 tonnes of food aid.

WFP has been assisting some 1.48 million people with 142 000 tonnes of food under the current Protracted Relief and Recovery Operation (PRRO), which began in July 2003 and is expected to come to an end by early July 2005.

THAILAND (5 February)

The main agricultural operations currently ongoing, include planting of second season rice for harvest from May/June. The main rice crop planted in June/July 2003, which accounts for over 80 percent of total production, was harvested from October/November 2003. The 2003 paddy rice production is estimated to increase to a record level of 26.8 million tonnes, as a result of favourable weather.

Thailand is the world's top rice exporter with an anticipated 8 million tonnes of exports in 2003/04.

Harvesting of coarse grains, mainly maize, is also complete. The 2003 output is estimated at 4.5 million tonnes, almost all used to meet domestic food needs. The demand is weak due to the outbreak of the avian influenza virus which has killed five people in Thailand and about 26 million chickens have been destroyed so far. The country has the fourth-largest chicken industry in the world, with annual exports worth US\$1.5 billion. About 81 000 families, employed on 30 000 poultry farms and in related operations, rely on the poultry industry for their living.

TIMOR-LESTE, DEMOCRATIC REPUBLIC OF (5 February)

Torrential rains towards the end of December 2003 caused severe flooding in several villages situated in Cailaco (Propinsi). Early assessments confirm that up to 400 people were seriously affected and 16 houses were completely or partially destroyed. In late December, the National Disaster Management Office (NDMO) provided support to 26 families with rice, cooling oil, and family kits. However, there are still significant unmet needs among those worst affected by the floods.

TURKEY (11 February)

Early prospects for the 2004 wheat and barley harvest have improved with recent heavy rain and snowfall. Production of wheat in 2003, estimated at 20.5 million tonnes, was about 4 percent higher than the average of the previous five years. Output of coarse grains (mostly barley and maize) also increased by about 200 000 tonnes on the previous five year average, to 11 million tonnes. Paddy production is forecast at 370 000 tonnes slightly above the previous year and the average.

Wheat imports in 2003/04 (July/June) are forecast at 500 000 tonnes compared with 1 million tonnes for the previous year. Maize imports are also forecast to decrease.

TURKMENISTAN (9 February)

Latest official reports indicate that area under winter cereals is similar to the significantly increased area planted last year. The Government, over the past few years, has sought to achieve food self-sufficiency by increasing area planted with cereals at the expense of other crops and cultivating marginal lands and pastures. Area under cereals, in particular wheat, has tripled over the past decade, from about 330 000 hectares in 1992 to about 940 000 hectares in 2003. The two main rivers, Amu and Murghab, are the main sources of irrigation water in Turkmenistan, both of which begin their course from the Hindukush mountain in Afghanistan and Tajikistan. Ample snow cover and precipitation throughout the region and in particular over the Hindukush are seen to provide the much-needed irrigation water for the desert country. With the current production levels the country has, by and large, achieved its stated goal of food self-sufficiency.

UZBEKISTAN (9 February)

Favourable weather conditions and sustained efforts by the government to increase cereal production has ensured that similar areas were planted with winter cereals this year compared with the high areas planted in 2002/03. Winterkill is significantly low and crop conditions are satisfactory. Ample snow cover throughout the region and above average precipitation are seen to positively affect yields and in some areas allow double cropping. Aggregate cereal harvest is tentatively and conservatively estimated at just below 5 million tonnes, which is about 321 000 tonnes below the improved harvest of last year. Cereal import requirement, mainly food-quality wheat, during the current marketing year is estimated at about 394 000 tonnes, including some 35 000 tonnes in food aid.

VIET NAM (9 February)

Harvesting of the summer-autumn and the Lua Mua paddy crops (or the "tenth month" crop harvested in December-January) has been completed. The paddy rice output in 2003 has been officially estimated at 34.7 million tonnes, marginally up from 2002, despite reports of a prolonged drought in the Northern and Central regions.

Viet Nam in 2003/04 is expected to export 4 million tonnes of rice, 2.8 percent more than the previous marketing year, making the country the world's second largest rice exporter after Thailand. Viet Nam has targeted 3.5 million tonnes of rice exports in 2004/05.

Harvest of the winter/spring rice crop is due to start from the middle of February in some parts. The crop is the largest of the three rice crops produced each year, contributing about 36 percent of aggregate rice production. Crop conditions are normal.

The northern part of the country is seriously affected by drought, which could potentially destroy 22 000 hectares of rice crops.

According to provincial officials, around 1 400 cows, buffalos and pigs have been reportedly infected with foot-and mouth disease in central Viet Nam, provincial officials. The disease was initially reported

in central Quang Nam province in late December, and local authorities have destroyed 84 infected pigs. However, infected cows and buffalos are being treated and some of them have recovered.

Up to February 10, the outbreak of the avian influenza virus has caused 14 human deaths. An estimated more than 14 million chickens have been slaughtered or destroyed.

YEMEN (11 February)

Land preparation for the sowing of the main sorghum and millet crops to be harvested towards the end of the year is about to start. The output from the 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 2.5 million tonnes.

CENTRAL AMERICA (including the Caribbean)

COSTA RICA (5 February)

Harvesting of 2003/04 second season cereal crops has been virtually completed. Official sources provisionally estimate 2003 paddy production at about 260 000 tonnes, below the last five-year average of 309 000 tonnes. Output of (white) maize is expected to be 16 700 tonnes, about 42 percent higher than the previous two years' production that was seriously affected by dry spells. However, production of maize continues the declining trend of the past years as the country imports most of its consumption requirements. Harvesting of the bean crops, an important staple in the population's diet, is also well advanced and about 12 800 tonnes are provisionally forecast, which is below last five-year average of 14 500 tonnes.

CUBA (9 February)

Planting of the 2004 winter paddy crop is underway, while harvesting of the summer paddy crop has been completed. Aggregate 2003 paddy output is provisionally estimated at 315 000 tonnes, close to the previous year's volume. Sowing of the second season rain-fed maize crop is due to start from March/April. Harvesting of the 2003/04 sugar cane crop, the main agricultural export, is underway and official sources indicate an output of 2.6 million tonnes, a recovery from the 2002/03 low level of 2.2 million tonnes.

Wheat imports in marketing year 2003/04 (July/June) are forecast at about 1 million tonnes, while rice imports in 2004 (January/December) are expected to be close to previous year's level of 550 000 tonnes.

DOMINICAN REPUBLIC (5 February)

Despite some damage due to hurricane rains and consequent flooding in the Northwest and Northeast departments in November and December, 2003 paddy output (January/December) is provisionally estimated at about 680 000 tonnes, confirming the good results of the last five years. Harvesting of 2003/04 second season minor maize and sorghum crops is underway and the aggregate coarse grain output (first and second seasons) is forecast at an average level of 52 000 tonnes.

EL SALVADOR* (5 February)

Harvesting of 2003 second season coarse grain, paddy and bean crops has been completed. The aggregate output of maize, the main cereal, is expected to be 610 000 tonnes, which is above the last five years' average. By contrast, the 2003 paddy production was estimated at only 28 000 tonnes, reflecting reduced plantings.

The crisis of the coffee sector continues to affect large sections of the rural population with negative impact on the nutritional situation. Food and non-food assistance continues to be delivered by the international community, in particular in the western departments of Ahuachapan, Sonsonate and La Libertad, targeting vulnerable groups such as children under five and expectant and nursing mothers.

GUATEMALA* (5 February)

Harvesting of the 2003 second season cereal crop is almost completed. The aggregate maize and sorghum outputs (first and second seasons) are expected to be an average of about 1 million tonnes and 47 000 tonnes respectively. The 2003 paddy production was a near average 40 000 tonnes.

Maize imports, mainly yellow, in marketing year 2003/04 (July/June) are forecast to increase slightly from the previous year to some 600 000 tonnes, while wheat imports are expected to be stable at last year level of 540 000 tonnes. Food assistance continues to be provided by the international community to rural families with high rates of chronic malnutrition and those financially affected by the persistent crisis of the coffee sector.

HAITI* (19 February)

The political situation in the country continues to deteriorate. The escalation of violence in recent weeks has resulted in loss of life in several areas and is disrupting all economic and trade activities. In the Northern Department, the civil unrest has worsened an already difficult food situation following heavy rains and floods at the end of December 2003 which seriously damaged housing, crops, livestock and food reserves. The international community is facing serious problems in delivering food in the flood-affected areas, as well as in the drought-prone departments of the North-West and Central Plateau, where malnutrition is an endemic problem. This is mainly due to the increasing insecurity and the closure of roads due to the political unrest. If normal delivery of food assistance does not resume in the next few weeks, the food security level of about 270 000 people is likely to be threatened by a major food crisis.

Harvesting of 2003/04 second season cereal crop is about to be completed, while planting of the 2004 first season paddy crop has recently started. The 2003 aggregate maize and sorghum outputs are expected to be average at 200 000 tonnes and about 100 000 tonnes respectively. Wheat imports in 2003/04 marketing year (July/June) are forecast around the previous year's level of 295 000 tonnes, while those of rice are anticipated at 260 000 tonnes.

HONDURAS* (5 February)

Harvesting of 2003/04 second season cereal and bean crops is well advanced. The aggregate output of maize is forecast at about 530 000 tonnes, which is about 10 percent above the last five years average. Production of the minor sorghum crop is expected at an average level of 67 000 tonnes. 2003 paddy output is estimated at 13 600 tonnes.

Wheat and maize imports in marketing year 2003/04 (July/June) are forecast to be slightly higher than the 250 000 tonnes and 240 000 tonnes that respectively were imported in the previous year. Declining international coffee prices continue to affect several thousand rural

families in the sector. Food assistance continues to be provided by the international community, targeting women and children in municipalities with over 50 percent chronic malnutrition.

MEXICO (10 February)

Harvesting of the 2003 rain-fed spring/summer maize crop, which accounts for almost 85 percent of total production, has been virtually completed, while planting of the winter crop is well advanced in the main producing states of Sinaloa, Chiapas and Veracruz. Early forecast points to an aggregate 2003/04 maize output (summer and winter) of about 19.3 million tonnes, similar to the good level of last year reflecting favourable weather. Harvesting of 2004 sorghum crop is still underway reflecting late planting in some areas of the northeast due to lack of rains. The output is provisionally estimated at an average 5.9 million tonnes. Planting of the 2004 main (winter) wheat crop is virtually completed and prospects for the output are good.

Maize imports in 2003/04 marketing year (July/June) are expected to increase from almost 4.8 million tonnes to about 6.7 million tonnes reflecting demographic growth.

NICARAGUA* (5 February)

Harvesting of the 2003/04 second season *postrera* maize crop and beans has been completed and harvesting of the small third *apante* crop, mainly in the departments on the Atlantic coast (Región V, Ríos San Juan and Región Autónoma del Atlántico Norte), is due to start in March. In aggregate, the 2003 maize output is expected to reach a record level of about 529 000 tonnes. Production of beans, an important food staple, is also forecast to be record at 180 000 tonnes.

Wheat imports in marketing year 2003/04 are forecast at average 120 000 tonnes. The coffee crisis is still affecting the country, especially the main growing departments of Matagalpa, Jinotega and Las Segovias, with negative impact on food security. Food assistance from the international community continues to be delivered, particularly through school feeding programs.

SOUTH AMERICA

ARGENTINA (9 February)

Harvesting of the 2003 wheat crop has been completed and output is officially estimated at about 13.2 million tonnes, 7.3 percent higher than last year's output. This mainly reflects beneficial rains in the last months of 2003 in the main growing areas of Buenos Aires, Santa Fe and Entre Ríos, that more than compensated for the reduced outputs in Córdoba and La Pampa, affected by a prolonged dry-spell during the growing season. Planting of 2004 maize crop was completed by late January and the area is provisionally estimated at 2.8 million hectares. Sowing of the 2004 paddy crop was completed by late December and the total area planted is provisionally estimated at 169 000 hectares, an increase of 25 percent compared to the previous year. Production of paddy in 2003 was 718 000 tonnes, continuing the declining trend from the record level of 1.6 million tonnes in 1999.

BOLIVIA (9 February)

Persistent heavy rains during January resulted in floods and landslides in several areas of the departments of La Paz, Cochabamba, Beni and Pando causing serious damage to housing and infrastructure. The international community is providing emergency food aid to the people affected in the city of Trinidad and the department of Cochabamba. However, the abundant rains benefited developing cereal crops, previously stressed by severe dry weather in December 2003. Crops and pastures are currently reported in good conditions. Provided good weather persists in the remaining

of the growing season, a good 2004 first season grain crops (wheat, maize and rice) are expected to be harvested from April.

Wheat imports in marketing year 2003/04 (July/June) are forecast at 250 000 tonnes, similar to the previous year's volume.

BRAZIL (10 February)

Floods and mudslides triggered by continuous rains in January affected northeast, central-west and southeast Brazil, in particular the states of Sao Paulo and Mato Grosso, resulting in loss of life and damage to infrastructure. Harvesting of the 2003 wheat crop has been recently completed and the output is officially estimated at a record level of 5.6 million tonnes, about 90 percent above the previous year's crop. This is largely due to a 21 percent increase in planted area and to the positive effect on yields of favourable weather conditions in the main producing states of Rio Grande do Sul and Parana. Harvesting of the 2004 first season (summer) maize crop is underway in centre-south states. The crop is reported in general good conditions and official forecast points to an output of 33.8 million tonnes, 3 percent lower than in the same season of 2003. This decline is mainly due to diversion of land to soybeans following more attractive prices and trade opportunities. Harvesting of the 2004 paddy crop in Centre and South areas is about to start. A record paddy production of 11.7 million tonnes is forecast, due to expanded planted area in the main growing states of Rio Grande do Sul and Mato Grosso in response to high domestic prices.

CHILE (10 February)

Harvesting of the 2003/04 wheat crop is well advanced and the output is forecast at 1.8 million tonnes, close to last year's good level. Harvesting of the 2004 main maize crop is due to start from March. Following favourable growing conditions a record output of 1.2 million tonnes is anticipated.

Wheat and maize imports in marketing year 2003/04 (July/June) are likely to be similar to last year's levels of 400 000 tonnes and 1 million tonnes respectively.

COLOMBIA (9 February)

Heavy rains, flooding and mudslides in December caused heavy damage to housing and infrastructure, particularly in the departments of Cordoba, Antioquia, Choco and Cundinamarca. Harvesting of the 2003/04 second season cereal crops continues under normal weather conditions. In 2003, Maize output is about 1.2 million tonnes, close to the good results of the last three years, while an average output of 230 000 tonnes of sorghum is anticipated. Production of the main paddy crop is forecast to be record at 2.5 million tonnes, mainly due to the expansion of the area planted.

Wheat imports for marketing year 2003/04 (July/June) are forecast to be similar to the previous year's level of 1.2 million tonnes and those of maize to increase to 2.2 million tonnes, due to increasing feed demand. Food assistance from the international community is being provided to the internally displaced population, victims of the persistent civil strife affecting the country.

ECUADOR (19 February)

Production of 2003 rice is estimated at about 1.2 million tonnes. Plantings of the 2004 main (winter) yellow maize and of the main paddy crop in coastal areas have been stopped due to unfavourable weather conditions. In particular, dry weather during the month of January in the departments of Los Rios, Manabi and Guayas caused losses in the area planted to cereals. While a detailed assessment of the situation is being carried out by the Ministry of Agriculture, normal rains resumed and planting re-started. Although these beneficial rains would allow some hectares of paddy and maize to be re-planted, this will largely depend on the availability of credit. Wheat and maize commercial imports in marketing year 2003/04 (July/June) are expected to be close to the volumes imported the previous year: 400 000 tonnes and 350 000 tonnes respectively.

PERU (10 February)

Planting of yellow maize crop is underway, while the bulk of the planting of white maize crop has been completed. Total maize plantings are expected to be close to the record level of 560 000 hectares reached in the previous two years. Planting of the 2004 wheat crop is underway in the southern highlands, where it is grown for direct human consumption. Provided normal weather conditions persist during the growing season, the output is expected at an average level of 190 000 tonnes. The country heavily depends on imports to satisfy its growing demand, mainly for bread. Wheat imports in marketing year 2004 (January/December) are forecast at 1.4 million tonnes, a slight increase from the previous year reflecting demographic growth. Sowing of the 2004 irrigated paddy crop is underway. The 2003 paddy output was estimated at a record level of 2.3 million tonnes due to higher plantings following governmental support with inputs credit. Maize imports in marketing year 2004 (January/December) are expected to decline from previous year level of 925 000 tonnes due to good prospects for domestic production.

URUGUAY (10 February)

Harvesting of the 2004 paddy, the country's main cereal, is scheduled from March. The output is expected at a record level of 1.15 million tonnes, with an exportable surplus of about 1 million tonnes. This mainly reflects an increase of 20 percent in the area planted in response to higher international prices. Harvesting of the 2003 wheat crop has been completed and official sources point to an output of about 300 000 tonnes, with favourable weather conditions offsetting the decline in planting area. By contrast, the area planted to the 2004 maize crop is estimated some 30 percent higher than in the previous year in response to high domestic prices. Production is forecast to increase to 220 000 tonnes.

VENEZUELA (10 February)

Although maize is planted all year round, the bulk of harvesting of the 2003 (mainly white) maize crop has been completed in December and an above-average output of about 1.6 million tonnes is provisionally estimated. This result is mainly due to the positive impact on yields of favourable weather conditions in the main growing area of Guarico. On the contrary, 2003 paddy production is provisionally estimated at about 0.6 million tonnes, below the average production of 0.7 million tonnes. This result is close to previous year's output that was also affected by a reduction in planting area due the insufficient irrigation water in the state of Guarico.

Wheat and maize imports in marketing year 2003/04 (July/June) are expected to reach 1.2 million tonnes and 500 000 tonnes respectively.

EUROPE

EU (10 February)

Prospects for the winter cereal crops planted last autumn are good reflecting generally favourable weather throughout the winter so far. In order to promote an increase in cereal output in 2004, the European Commission (EC) reduced the compulsory set-aside area to 5 percent, from 10 percent in 2003. Although, the decision came too late to have a large impact on the winter grain sowing decisions in most countries, latest information indicates that the winter wheat area has nevertheless increased, a development that occurred independently of the policy change. The most significant increase is in France, where the early maize harvest last year enabled timely preparation of fields for winter wheat planting and producers were keen to shift area back to winter wheat after the reduced area in the previous year, especially in view of an expected increase in returns for wheat in 2004. Among the other main producers in the Community where the winter wheat area is tentatively estimated to have risen are Germany, the United Kingdom and Spain. Winter coarse grain areas are also likely to be up overall and the spring cereal area is expected to increase throughout the Community, weather conditions permitting. Producers are expected to take full advantage of the

reduced set-aside requirements, especially in view of the improved cereal market prospects in the Community for the coming year.

BELARUS (5 February)

Favourable weather conditions coupled with adequate availability of seeds, machinery and other inputs as well as relatively high cereal prices have encouraged farmers to increase area planted with winter cereals, 1.1 million hectares this year compared with 992 000 hectares in 2003. Adequate snow in the past couple of months has provided good protection for winter crops. Given favourable weather conditions persist, Belarus is set to maintain the high output level of the past few years. The Government has been attempting to increase cereal production, not only to meet domestic consumption requirements but also export. However, the country still remains a net cereal importer, mainly maize and food quality wheat. The aggregate cereal harvest last year totalled 5.1 million tonnes and cereal imports requirements for the 2003/04 marketing year is estimated at 446 000 tonnes.

BOSNIA-HERZEGOVINA (10 February)

Latest reports point to a similar area planted with winter cereals, mainly wheat and barley, as in the previous year, and the crops are reported to be in satisfactory condition. Spring crops are the most important in the country's cropping calendar accounting for more than 80 percent of the aggregate cereals. Both winter and spring crops are highly susceptible to adverse weather conditions, it is therefore too early to predict cereal harvest for this year. Last year adverse weather conditions significantly compromised winter and spring crops and aggregate cereal harvest amounted to just over 1 million tonnes, which is some 234 000 tonnes down on 2002 harvest. Domestic production cannot meet requirements even when harvest is good. Aggregate cereal import requirement for 2003/04 is estimated at about 510 000 tonnes, including 100 000 tonnes in food aid.

BULGARIA (10 February)

The winter wheat area is officially reported to be about 940 000 hectares, up from about 900 000 in the previous year. The crop is reported to be in excellent condition so far and if weather conditions remain normal then output of wheat in 2004 is set to rise significantly from last year's drought-reduced level.

CROATIA (10 February)

Latest reports indicate satisfactory winter crop conditions and that similar areas have been planted with winter cereals. The Government is planning to match the improved harvest of 2001/02. It is too early to predict this year's harvest but the overall growing conditions seem favourable. Following an unusually dry spring and summer aggregate cereal harvest declined from 3.7 million tonnes in 2001/02 to 2.5 million tonnes in 2002/03. Aggregate cereal import requirement for the current marketing year is estimated at 192 000 tonnes, whereas over the past 5 years Croatia was a net cereal exporter.

CZECH REPUBLIC (10 February)

Cereal production is likely to recover in 2004 from the low level last year. A return to normal planted areas and average yields could raise output by some 1 million tonnes compared to the drought-struck crop of just 5.7 million tonnes in 2003. Weather conditions have been favourable so far for the winter cereals, which account for bulk of the country's cereal output.

ESTONIA (10 February)

Latest reports indicate that the aggregate area planted with cereals is planned to remain similar to the 2002 level. Area planted with winter cereals, estimated at about 38 000 hectares is a mere 14 percent of the aggregate. Estonia relies on commercial imports to meet consumption requirements.

The aggregate cereal import requirement for the current marketing year is estimated at about 243 000 tonnes. Average cereal production over the past five years is estimated at about 570 000 tonnes.

HUNGARY (10 February)

The winter wheat area in Hungary is estimated to be slightly larger than that of the previous year and soil moisture is reported to be adequate so far pointing to a sharp recovery in output this year after drought in 2003 if normal conditions prevail.

LATVIA (9 February)

Latest reports indicate that a similar area has been planted with winter cereals this year compared with last year, estimated at about 144 000 hectares. Winter wheat and rye are the most important winter cereals. Winter crops are reportedly in good condition following ample snow cover, which has shielded crops from the cold winter. Output of winter cereals is seen to match the good harvest of the past few years, provided favourable weather conditions prevail. Last year Latvia harvest an aggregate of 980 000 tonnes of cereals and import requirement for the current marketing year is estimated at 141 000 tonnes.

LITHUANIA (9 February)

Favourable weather conditions and improved access to farm inputs in addition to relatively high cereal prices have encouraged farmers to plant 400 000 hectares with winter cereals, matching last year's area. Winterkill is reported to be slightly above last year's level. The aggregate winter cereal harvest is tentatively estimated at about 1.2 million tonnes, which is some 140 000 tonnes down on last year's improved harvest. Winter and spring crops are equally important in the country's cropping calendar and some of the damaged areas are usually replanted in spring. Cereal production is sufficient to meet domestic requirements.

MOLDOVA (6 February)

Area planted with winter cereals, mainly wheat and barley, is estimated at 313 000 hectares, which is about 184 000 hectares less than initial plans. Despite favourable weather conditions, farmers did not have sufficient access to seeds, machinery, fuel and fertilizers, following last year's worst crop failure in living memory. Hopes are pinned on spring crops, which are highly susceptible to spring and summer precipitation and temperatures. Last year wheat harvest was estimated at 102 000 tonnes compared with almost 1.2 million tonnes the year before, while barley harvest declined from 256 000 tonnes to a mere 48 000 tonnes. Maize planted in late spring and early summer last year yielded more than 1.5 million tonnes, compared with 1.19 million tonnes in 2002, the latter was considered a record harvest.

POLAND (10 February)

Early indications point to a recovery in cereal output in 2004 after the previous year's drought-reduced level. The overall cereal area for the 2004 harvest is expected to increase in response to better price prospects in the coming season. An increase in the size of the winter cereal area has already been reported. The winter crops are reported to be in satisfactory conditions so far and if weather conditions are normal for the remainder of the season then even a return to average yields after last year's poor levels will ensure a significant increase in output.

ROMANIA (10 February)

Cereal output is expected to recover in 2004 due to increased plantings and yields. An early official forecast puts wheat output at about 6 million tonnes in 2004 (2003: 2.5 million tonnes) reflecting favourable weather during planting, which allowed an average area to be sown and ensured good emergence and establishment of crops.

RUSSIAN FEDERATION (5 February)

Adequate soil moisture and favourable weather conditions in early winter throughout the country were favourable to winter cereal planting. Area planted with winter cereals is up by 13 percent compared with 2003 but more than 11 percent below the plan to match areas planted in 2002. Inadequate access to seeds and other inputs in some parts of the Russian Federation are reportedly the main causes of lower than planned areas being planted with winter cereals. Sufficient snow cover in much of the country sheltered winter cereal crops from the recent harsh winter weather. Therefore, winterkill, on average 1.5 to 2 million hectares, is seen to be significantly down. Preliminary forecasts for aggregate cereal harvest stands at about 78 million tonnes, which is nearly 19 percent above the harvest in 2003 but almost 9 percent below the bumper harvest in 2002. Last year adverse weather conditions significantly compromised the cereal harvest and exports plunged to 5.4 million tonnes from a record 18.3 million tonnes in 2002/03 marketing year.

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. WFP plans to provide 47 882 tonnes of food to target some 259 000 most vulnerable population in Chechnya and Ingushetia over a period of 18 months beginning from January 2004.

SERBIA AND MONTENEGRO* (10 February)

Area planted with winter cereals, mainly wheat and barley, is similar to last year, and winter crops are reportedly in satisfactory conditions. Aggregate cereal production has varied between 5 and 10 million tonnes over the past six years, owing to highly volatile weather conditions. Given the nature of weather volatility, it is too early to forecast this year's cereal harvest. However, the Government predicts to match the good harvest of 2001 estimated at 8.9 million tonnes. Last year aggregate harvest amounted to about 5.5 million tonnes, nearly 3 million tonnes down on the year before. Aggregate cereal import requirements, mainly wheat, for the current marketing year is estimated at 500 000 tonnes, including 60 000 tonnes of food aid.

The current Protracted Relief and Recovery Operation (PRRO) is expected to phase out by the end of March 2004. A total of 63 200 internally displaced persons and vulnerable population would have received 12 237 tonnes of food under the current phase of the PRRO, which began in July 2003.

SLOVAK REPUBLIC (10 February)

A recovery from last year's reduced cereal output is expected in 2004, reflecting generally favourable weather conditions so far and the good price incentive for cereal producers throughout the region this season.

THE FORMER YUGOSLAV REPUBLIC OF MACEDONIA (10 February)

Prospects for the winter cereal crops are generally satisfactory despite some planting delays due to unfavourable weather and persisting dry conditions in parts. As of mid-December the winter cereal area was reported to be about 90 percent of the targeted 180 000 hectares, but the remainder was expected to be successfully completed. Slow planting activity was mostly evident among the large cooperatives (mostly state-owned), due to lack of funding, unresolved ownership status and lack of quality seed.

In response to reduced domestic wheat supplies after last years small crop and the generally reduced supply situation elsewhere in Europe also, the Government announced in January a ban on exports of wheat and flour until 30 June 2004.

UKRAINE (5 February)

Area planted with winter cereals at 6.8 million hectares is only 86 percent of the targeted area and nearly 1 million hectares below the five year average. Adverse weather conditions during the planting season, lack of sufficient seeds, agricultural machinery, fuel and fertilizers have reportedly contributed to lower than planned area being planted with winter crops. Latest reports indicate that more than 70 percent of the crops are in good conditions, usually the figures is much lower with winterkill ranging between 1 and 1.5 million hectares. Adequate soil moisture and snow cover are seen to reduce winterkill this year. Last year winterkill was estimated at 3.7 million hectares, which resulted in a record low winter cereal harvest of 4.2 million tonnes compared with about 22 million tonnes in 2002. The government is attempting to increase area under spring crops to counter the drop in area under winter cereals. Aggregate cereal harvest in 2003 amounted to 19.9 million tonnes compared with 36.3 million tonnes the year before. Ukraine became a net cereal importer with imports estimated at 3.6 million tonnes during the current marketing year. Exports during the 2002/03 marketing year amounted to a record 10.7 million tonnes.

NORTH AMERICA

CANADA (9 February)

Agriculture and Agri-Food Canada reported their outlook for the 2004/05 crop seeding in early February. The relatively small winter wheat crop for harvest in 2004 has already been sown and the area is estimated at some 600 000 hectares, about 10 percent down from the record level in the previous year. Plantings decreased sharply in Eastern Canada due to poor conditions in the autumn for fieldwork. Early indications for the main spring wheat crop to be sown later this year point to a marginal decrease in soft wheat area and production but a significant increase for durum. The soft wheat area is expected to decrease by about 4 percent in response to a reduced price outlook compared to the previous year, particularly for soft wheat relative to some other crops. Thus, even assuming normal weather throughout the season and an average yield, production could decline marginally to just about 19 million tonnes. By contrast, the durum seeded area is expected to increase by about 4 percent, reflecting continued premiums for durum in the previous year compared to soft wheat. Furthermore, assuming that the average durum yield returns to normal after a poor level in 2003, durum output is expected to increase by over 20 percent to about 5.2 million tonnes. The aggregate wheat crop in 2004 is tentatively forecast at about 24.3 million tonnes, 3.3 percent up from 2003.

Production of coarse grains is also expected to increase in 2004 by about 5 percent to 27.9 million tonnes. Although the area seeded to barley, the main coarse grain, is forecast to decrease slightly, the amount cut for fodder is expected to be less than the average in recent years and thus the area harvested for grain should increase. Barley yields also seen to increase somewhat this year after drier than normal conditions continued to affect some crops last year. However, as in the previous year, cereal yields in 2004 will depend largely on timely rains as sub-soil moisture conditions remain below normal in some areas still suffering from the drought since 2002.

UNITED STATES (9 February)

The winter wheat area for the 2004 harvest is officially estimated at 17.6 million hectares, 3 percent down from the previous year's area. The Hard Red Winter wheat area fell by 4 percent and much of the crop in the western and southern Great Plains is reported to have suffered from lack of moisture during emergence and establishment, with a likely negative impact in the winter-hardiness of crops. Furthermore, with limited snow cover reported in many parts of the Plains, large areas of dormant crops are vulnerable to low temperatures. The White Winter wheat area also dropped due to lack of soil moisture at planting time. By contrast, the Soft Red Winter wheat area in the Corn Belt states is up slightly from last year reflecting increased incentive for producers from this crop, which performed well last year compared to alternative crops. At this stage, with little change expected in the spring

wheat area, given the reduced area and relatively poor condition of the main winter wheat crop, it looks likely that the aggregate US wheat output will decline somewhat in 2004 from the previous year's crop, which was the largest of the past five years (63.6 million tonnes).

The final estimate of the 2003 coarse grains crop is 276 million tonnes, almost 13 percent up from the previous year's poor crop and above the average of the past five years. Of the total, maize is estimated to account for about 257 million tonnes. The 2004 coarse grain sowing will start from March.

OCEANIA

AUSTRALIA (10 February)

The recently completed 2003 wheat harvest is officially estimated at 23.9 million tonnes, almost 37 percent up from the previous year's severely reduced crop and above the average for the five years preceding the 2002 drought. The 2003 winter coarse grain crop was also sharply recovered from the previous year's drought level, taking aggregate coarse grain output in 2003 to 12 million tonnes (2002: 7.6 million tonnes). Early prospects for the 2004 summer coarse grain crop (mostly sorghum) are very favourable reflecting good rains in Queensland, the main producing region. In New South Wales, the continuation of drought until recently somewhat restricted sorghum plantings again but yields prospects for the crops that were sown there are also good. The sorghum output in 2004 is officially forecast at 2.0 million tonnes, compared to just 1.5 million tonnes in 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 |
| AFRICA | | 33 216.6 | 3 899.3 | 37 115.9 | 33 026.6 | 9 197.9 | 1 273.0 | 7 924.9 |
| Northern Africa | | 15 984.8 | 15.4 | 16 000.2 | 14 353.0 | 6 566.1 | 17.1 | 6 549.0 |
| Egypt | July/June | 11 709.6 | 11.0 | 11 720.6 | 12 100.0 | 5 663.9 | 17.1 | 5 646.8 |
| Morocco | July/June | 4 275.2 | 4.4 | 4 279.6 | 2 253.0 | 902.2 | 0.0 | 902.2 |
| Eastern Africa | | 3 461.2 | 2 394.4 | 5 855.6 | 4 814.0 | 492.7 | 320.4 | 172.3 |
| Burundi | Jan./Dec. | 39.4 | 57.4 | 96.8 | 70.0 | 3.7 | 3.7 | 0.0 |
| Comoros | Jan./Dec. | 23.6 | 0.0 | 23.6 | 33.0 | 9.7 | 0.0 | 9.7 |
| Djibouti | Jan./Dec. | 56.6 | 6.4 | 63.0 | 63.0 | 1.6 | 1.6 | 0.0 |
| Eritrea | Jan./Dec. | 258.0 | 228.4 | 486.4 | 478.0 | 39.3 | 39.3 | 0.0 |
| Ethiopia | Jan./Dec. | 48.6 | 1 683.2 | 1 731.8 | 210.0 | 21.1 | 21.1 | 0.0 |
| Kenya | Oct./Sept. | 1 065.5 | 84.4 | 1 149.9 | 1 610.0 | 90.4 | 42.9 | 47.5 |
| Rwanda | Jan./Dec. | 203.2 | 23.2 | 226.4 | 226.0 | 1.7 | 1.7 | 0.0 |
| Somalia | Aug./July | 283.5 | 16.5 | 300.0 | 290.0 | 31.8 | 18.4 | 13.4 |
| Sudan | Nov./Oct. | 1 023.5 | 111.0 | 1 134.5 | 1 229.0 | 91.7 | 91.7 | 0.0 |
| Tanzania,U.R. | June/May | 399.9 | 40.1 | 440.0 | 440.0 | 190.7 | 89.0 | 101.7 |
| Uganda | Jan./Dec. | 59.4 | 143.8 | 203.2 | 165.0 | 11.0 | 11.0 | 0.0 |
| Southern Africa | | 3 567.4 | 982.6 | 4 550.0 | 3 646.0 | 1 792.2 | 651.6 | 1 140.6 |
| Angola | April/March | 607.2 | 223.9 | 831.1 | 709.0 | 339.7 | 179.7 | 160.0 |
| Lesotho | April/March | 202.0 | 41.7 | 243.7 | 329.0 | 148.3 | 16.9 | 131.4 |
| Madagascar | April/March | 301.1 | 45.9 | 347.0 | 353.0 | 149.2 | 42.1 | 107.1 |
| Malawi | April/March | 450.3 | 184.4 | 634.7 | 96.0 | 9.8 | 8.7 | 1.1 |
| Mozambique | April/March | 656.2 | 94.9 | 751.1 | 744.0 | 414.0 | 169.4 | 244.6 |
| Swaziland | May/April | 90.5 | 14.6 | 105.1 | 128.0 | 75.6 | 6.8 | 68.8 |
| Zambia | May/April | 301.3 | 61.4 | 362.7 | 36.0 | 43.5 | 16.0 | 27.5 |
| Zimbabwe 2/ | April/March | 958.8 | 315.8 | 1 274.6 | 1 251.0 | 612.1 | 212.0 | 400.1 |
| Western Africa | | 9 342.5 | 435.9 | 9 778.4 | 9 273.6 | 318.5 | 255.5 | 63.0 |
| Coastal Countries | | 6 780.1 | 224.9 | 7 005.0 | 6 891.4 | 89.2 | 89.2 | 0.0 |
| Benin | Jan./Dec. | 112.2 | 8.0 | 120.2 | 115.0 | 6.5 | 6.5 | 0.0 |
| Côte d'Ivoire | Jan./Dec. | 1 369.2 | 12.1 | 1 381.3 | 1 392.4 | 5.4 | 5.4 | 0.0 |
| Ghana | Jan./Dec. | 526.0 | 55.3 | 581.3 | 516.0 | 61.8 | 61.8 | 0.0 |
| Guinea | Jan./Dec. | 333.5 | 38.2 | 371.7 | 365.0 | 0.0 | 0.0 | 0.0 |
| Liberia | Jan./Dec. | 116.8 | 63.7 | 180.5 | 183.0 | 14.7 | 14.7 | 0.0 |
| Nigeria | Jan./Dec. | 3 970.0 | 0.0 | 3 970.0 | 3 900.0 | 0.0 | 0.0 | 0.0 |
| Sierra Leone | Jan./Dec. | 268.4 | 39.6 | 308.0 | 320.0 | 0.8 | 0.8 | 0.0 |
| Togo | Jan./Dec. | 84.0 | 8.0 | 92.0 | 100.0 | 0.0 | 0.0 | 0.0 |
| Sahelian Countries | | 2 562.4 | 211.0 | 2 773.4 | 2 382.2 | 229.3 | 166.3 | 63.0 |
| Burkina faso | Nov./Oct. | 243.1 | 19.5 | 262.6 | 223.0 | 14.8 | 14.8 | 0.0 |
| Cape Verde | Nov./Oct. | 40.4 | 41.9 | 82.3 | 70.0 | 34.3 | 34.3 | 0.0 |
| Chad | Nov./Oct. | 80.0 | 15.9 | 95.9 | 91.0 | 9.2 | 9.2 | 0.0 |
| Gambia | Nov./Oct. | 150.6 | 6.4 | 157.0 | 142.6 | 2.0 | 2.0 | 0.0 |
| Guinea Bissau | Nov./Oct. | 58.7 | 15.2 | 73.9 | 69.6 | 5.4 | 5.4 | 0.0 |
| Mali | Nov./Oct. | 251.0 | 6.8 | 257.8 | 170.0 | 0.8 | 0.7 | 0.1 |
| Mauritania | Nov./Oct. | 370.0 | 78.9 | 448.9 | 290.0 | 61.0 | 61.0 | 0.0 |
| Niger | Nov./Oct. | 335.2 | 11.5 | 346.7 | 357.0 | 19.0 | 19.0 | 0.0 |
| Senegal | Nov./Oct. | 1 033.4 | 14.9 | 1 048.3 | 969.0 | 82.8 | 19.9 | 62.9 |
| Central Africa | | 860.7 | 71.0 | 931.7 | 940.0 | 28.4 | 28.4 | 0.0 |
| Cameroon | Jan./Dec. | 357.5 | 10.0 | 367.5 | 387.0 | 14.0 | 14.0 | 0.0 |
| Cent.Afr.Rep. | Jan./Dec. | 36.0 | 3.0 | 39.0 | 41.0 | 0.0 | 0.0 | 0.0 |
| Congo, Dem.Rep. | Jan./Dec. | 258.0 | 51.2 | 309.2 | 300.0 | 14.3 | 14.3 | 0.0 |
| Congo, Rep. | Jan./Dec. | 184.3 | 5.7 | 190.0 | 185.0 | 0.1 | 0.1 | 0.0 |
| Eq. Guinea | Jan./Dec. | 15.0 | 0.0 | 15.0 | 15.0 | 0.0 | 0.0 | 0.0 |
| Sao Tome | Jan./Dec. | 9.9 | 1.1 | 11.0 | 12.0 | 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 |
| ASIA | | 38 017.8 | 3 575.3 | 41 593.1 | 40 516.0 | 12 607.3 | 2 193.9 | 10 413.4 |
| Afghanistan | July/June | 809.1 | 376.8 | 1 185.9 | 506.0 | 87.3 | 87.3 | 0.0 |
| Armenia | July/June | 123.0 | 29.0 | 152.0 | 161.0 | 39.1 | 26.0 | 13.1 |
| Azerbaijan | July/June | 701.0 | 9.0 | 710.0 | 512.0 | 408.6 | 27.7 | 380.9 |
| Bangladesh | July/June | 2 874.9 | 383.9 | 3 258.8 | 2 325.0 | 1 739.6 | 134.6 | 1 605.0 |
| Bhutan | July/June | 67.9 | 3.1 | 71.0 | 59.0 | 1.6 | 1.6 | 0.0 |
| Cambodia | Jan./Dec. | 84.2 | 21.8 | 106.0 | 107.0 | 0.0 | 0.0 | 0.0 |
| China 3/ | July/June | 9 180.0 | 85.0 | 9 265.0 | 11 465.0 | 3 025.0 | 21.8 | 3 003.2 |
| Georgia | July/June | 476.0 | 18.0 | 494.0 | 530.0 | 303.6 | 59.8 | 243.8 |
| India | April/March | 42.8 | 166.2 | 209.0 | 100.0 | 280.1 | 240.3 | 39.8 |
| Indonesia | April/March | 9 117.8 | 186.2 | 9 304.0 | 8 340.0 | 1 104.9 | 167.9 | 937.0 |
| Iraq | July/June | 2 284.1 | 826.7 | 3 110.8 | 3 444.0 | 2 075.4 | 777.4 | 1 298.0 |
| Korea, D.P.R. | Nov./Oct. | 441.9 | 966.8 | 1 408.7 | 944.0 | 329.9 | 234.8 | 95.1 |
| Kyrgyz Republic | July/June | 127.0 | 8.0 | 135.0 | 187.0 | 0.0 | 0.0 | 0.0 |
| Lao, P.D.R. | Jan./Dec. | 19.3 | 19.2 | 38.5 | 27.0 | 0.3 | 0.3 | 0.0 |
| Maldives | Jan./Dec. | 38.0 | 0.0 | 38.0 | 40.0 | 14.6 | 14.6 | 0.0 |
| Mongolia | Oct./Sept. | 238.0 | 0.0 | 238.0 | 248.0 | 43.2 | 29.5 | 13.7 |
| Nepal | July/June | 96.1 | 3.9 | 100.0 | 100.0 | 8.0 | 8.0 | 0.0 |
| Pakistan | May/April | 306.3 | 74.2 | 380.5 | 1 800.0 | 20.9 | 14.0 | 6.9 |
| Philippines | July/June | 4 853.0 | 68.2 | 4 921.2 | 4 358.0 | 1 988.4 | 114.0 | 1 874.4 |
| Sri Lanka | Jan./Dec. | 1 018.5 | 31.5 | 1 050.0 | 1 105.0 | 366.3 | 23.5 | 342.8 |
| Syria | July/June | 1 933.3 | 9.2 | 1 942.5 | 815.0 | 514.0 | 5.0 | 509.0 |
| Tajikistan | July/June | 437.0 | 140.0 | 577.0 | 391.0 | 41.4 | 28.0 | 13.4 |
| Turkmenistan | July/June | 60.0 | 0.0 | 60.0 | 38.0 | 7.2 | 0.0 | 7.2 |
| Uzbekistan | July/June | 255.0 | 118.0 | 373.0 | 394.0 | 112.2 | 82.1 | 30.1 |
| Yemen | Jan./Dec. | 2 433.6 | 30.6 | 2 464.2 | 2 520.0 | 95.7 | 95.7 | 0.0 |
| CENTRAL AMERICA | | 3 036.7 | 238.2 | 3 274.9 | 3 320.0 | 1 193.2 | 156.8 | 1 036.4 |
| Cuba | July/June | 1 773.8 | 1.2 | 1 775.0 | 1 830.0 | 579.1 | 0.0 | 579.1 |
| Haiti | July/June | 471.8 | 153.2 | 625.0 | 620.0 | 236.1 | 55.8 | 180.3 |
| Honduras | July/June | 575.1 | 26.9 | 602.0 | 630.0 | 244.0 | 55.4 | 188.6 |
| Nicaragua | July/June | 216.0 | 56.9 | 272.9 | 240.0 | 134.0 | 45.6 | 88.4 |
| SOUTH AMERICA | | 797.1 | 62.9 | 860.0 | 881.0 | 334.4 | 5.3 | 329.1 |
| Ecuador | July/June | 797.1 | 62.9 | 860.0 | 881.0 | 334.4 | 5.3 | 329.1 |
| OCEANIA | | 400.5 | 0.0 | 400.5 | 402.0 | 27.2 | 0.0 | 27.2 |
| Kiribati | Jan./Dec. | 8.0 | 0.0 | 8.0 | 8.0 | 0.0 | 0.0 | 0.0 |
| Papua New Guinea | Jan./Dec. | 335.5 | 0.0 | 335.5 | 336.0 | 27.2 | 0.0 | 27.2 |
| Samoa | Jan./Dec. | 19.0 | 0.0 | 19.0 | 19.0 | 0.0 | 0.0 | 0.0 |
| Solomon Isl. | Jan./Dec. | 26.0 | 0.0 | 26.0 | 26.0 | 0.0 | 0.0 | 0.0 |
| Tuvalu | Jan./Dec. | 1.0 | 0.0 | 1.0 | 1.0 | 0.0 | 0.0 | 0.0 |
| Vanuatu | Jan./Dec. | 11.0 | 0.0 | 11.0 | 12.0 | 0.0 | 0.0 | 0.0 |
| EUROPE | | 1 492.4 | 111.6 | 1 604.0 | 1 597.0 | 204.6 | 8.7 | 195.9 |
| Albania | July/June | 355.8 | 27.2 | 383.0 | 384.0 | 142.6 | 8.7 | 133.9 |
| Belarus | July/June | 564.0 | 0.0 | 564.0 | 446.0 | 62.0 | 0.0 | 62.0 |
| Bosnia-Herzegovina | July/June | 315.6 | 84.4 | 400.0 | 510.0 | 0.0 | 0.0 | 0.0 |
| Macedonia, FYR | July/June | 257.0 | 0.0 | 257.0 | 257.0 | 0.0 | 0.0 | 0.0 |
| TOTAL | | 76 961.1 | 7 887.3 | 84 848.4 | 79 742.6 | 23 564.6 | 3 637.7 | 19 926.9 |

SOURCE: FAO

1/ Includes food deficit countries with per caput income below the level used by the World Bank to determine eligibility for IDA assistance (i.e. 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.

| C O N T E N T S | page |
|---------------------------------------|-------------|
| Affected countries | 2 |
| Crop and food supply situation | 3 |
| Country reports | 6 |
| Northern Africa | 6 |
| Western Africa | 7 |
| Central Africa | 11 |
| Eastern Africa | 13 |
| Southern Africa | 16 |
| Asia | 19 |
| Central America | 29 |
| South America | 31 |
| Europe | 33 |
| North America | 37 |
| Oceania | 38 |
| Summary tables | |
| Estimates for 2003/2004 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.

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